MR9 User Guide

for records retrieval & process serving businesses

version 9.01

The content of this user guide is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by OMTI Inc. OMTI assumes no responsibility or liability for any errors or inaccuracies that may appear in this book. Any references to company names or persons in sample screens are for demonstration purposes only and are not intended to refer to any actual organization or person.

MetaRecords 9, the MetaRecords logo and design, MR Connect, and the MR Connect design are trademarks of OMTI Inc. in the United States and other countries. *Excel* is a trademark of Microsoft Corporation registered in the United States and other countries. QuickBooks is a trademark of Intuit Inc. registered in the United States and other countries. Adobe Acrobat is a trademark of Adobe Systems Inc. registered in the United States and other countries.

For current information on OMTI and MetaRecords software and services, visit www.omti.com.

© 2026 OMTI Inc. All Rights Reserved. OMTI • 3420 Bristol St., Suite 400, Costa Mesa, CA 92626

MR9 User Guide

Table of contents

- Getting started
- Program Basics
- Orders
- Production
- Billing
- Inquiry
- Receivables
- Payables
- Reports
- Tools
- Entities
- Setup
- Connect
- Help
- Personal
- Appendices

Orders

Use the **Orders** module to enter new records requests, work orders (parts) and waiver responses; plus receive records, print forms, request fee checks, and schedule pickups.

- Orders
- Parts
- Tracking
- Notify Runners
- Send Forms
- Receive Records
- Daily Orders Audit
- Orders in Progress
- Processed Orders
- Orders Turnaround
- Order Analysis
- Daily Tracking Summary

Reference

- Order
- Orders preferences

Step-by-step instructions

- Starting orders
- Searching orders
- Updating orders
- Adding parts to orders
- Updating parts
- Generating a task list
- Notifying runners
- Sending forms
- Receiving records

- Auditing orders
- Analyzing work order progress
- Monitoring processed orders
- Analyzing work order turnaround
- Knowing who is calling
- Producing daily tracking summary

Production

Production is where you turn in orders and prepare them for billing. Ship out produced service items. Produce letters and labels. Archive and manage files in the central repository.

- Turn In
- Production Sheets
- Envelopes and Labels
- Shipping
- Repository

Reference

- System Preferences > Production
- Lists > Production

Step-by-step instructions

- Generating invoices
- Generating production sheets
- Printing envelopes and labels
- Shipping to clients
- Using repositories

Billing

After turning in orders and creating invoices, use this module to manage invoices, including COD invoices and electronic billing.

- Post Invoices
- COD Invoices
- Send Invoices
- Transfer Invoice
- Export Invoices
- Send Billing Forms

Reference

- System Preferences > Billing

Step-by-step instructions

- Searching unposted invoices
- Working with COD invoices
- Sending and archiving invoices
- Transferring invoices
- Exporting invoices in LEDES format
- Sending billing forms

Inquiry

Locate information in MR9's database, such as a particular invoice or which clients have an upcoming birthday. Plus analyze different aspects of your business, such as a client's invoice history.

- Invoice Inquiry
- Client Activity
- Client Analysis
- Receivable Transaction Inquiry
- Anniversary Inquiry
- Marketing Inquiry

Step-by-step instructions

- Searching for posted invoices
- Viewing client activity
- Summarizing client activity
- Searching for payment histories
- Keeping track of important client dates
- Knowing your market
- Finding highest commissioned sales reps

Receivables

Credit and track accounts receivable in MR9; plus assess finance charges, print monthly reports, and monitor collection efforts.

- Receive Payments
- Enter Other Transactions
- Send Payment Receipts
- Daily Register
- Daily Balance Log
- Finance Charges
- Monthly Journals
- Aged A/R
- Send Statements
- Client Account Activity
- Paid Invoices
- Voided Invoices
- Collection Letters
- Collection Follow-up
- Collection Forecast

Reference

- Accounts receivable
- System Preferences > Receivables
- Monthly reports at a glance

Step-by-step instructions

- Entering payments
- Applying retainers
- Viewing & posting other transactions
- Sending receipts for payments
- Printing daily registers

- Keeping track of accounts receivable balances
- Generating finance charges
- Printing monthly journals
- Finding overdue invoices
- Sending receipts for payments
- Printing client account activity reports
- Viewing paid invoices
- Viewing voided invoices
- Sending collection letters
- Following up on collection promises
- Forecasting cash flow from collections

Payables

Use MR9's Payables module to print fee checks/make credit card payments, and generate reports, such as sales commission or sales tax reports. Audit and reconcile fee checks/payments to get a handle on your custodian fee spending.

- Request Checks
- Print Checks
- Fee Checks
- Check Reconciliation
- Sales Commission Report
- Override Sales Commission
- Sales Tax
- Reward Points Summary
- Reward Points History
- Reward Points Analysis
- Import Check Reconciliation Data
- Bank Reconciliation

Reference

- System Preferences > Payables

Step-by-step instructions

- Entering check requests in batches
- Printing custodian fee checks
- Managing fee checks
- Printing sales commission reports
- Overriding commissionable amounts
- Generating sales tax reports
- Managing points
- Viewing point history
- Analyzing point activity
- Controlling custodian fee expenses
- Reconciling banks

Reports

Generate reports to analyze your business's productivity, profitability and other relevant data.

- Business Analysis
- Misc. Sales
- Client Rating Report
- Insurance Billing
- Processor Production
- Tracking Productivity Analysis
- Tracking Notes Log Analysis

Step-by-step instructions

- Analyzing your business
- Producing miscellaneous sales reports
- Producing client rating reports
- Producing insurance billing reports
- Producing processor production reports
- Analyzing tracking productivity

Tools

Reach for this toolbox when you want to import entities from other applications, quickly update different entities, or create and manage templates for form letters, notes, and labels. It also includes other admin tools, such as a way to search notes globally, monitor repository usage, and make your own queries to the database.

- Bulk Import
- Bulk Update
- Tag Manager
- Form Templates
- Label Templates
- Notes Finder
- Repository Download Log
- Download Backup File
- Email Log
- Merge History
- Query Maker
- QuickBooks Integrator

Reference

- System Preferences > Tools

Step-by-step instructions

- Importing entities from other systems
- Updating multiple firms at once
- Updating multiple contacts at once
- Updating multiple locations at once
- Managing tags
- Creating/updating forms & letters
- Creating DYMO label templates

- Managing label templates
- Searching notes
- Tracking inhouse and online repository access
- Viewing email logs
- Viewing merge histories
- Creating custom reports
- Preparing to use *QuickBooks Desktop* with MR9

Entities

Entities in MR9 are individuals, businesses, places, or discrete parts of your company, such as revenue centers or branch offices.

- Firms
- Contacts
- Locations
- Business Units

Reference

- Lists > Firms
- Lists > Contacts
- Lists > Locations
- System Preferences > Entities

Step-by-step instructions

- Adding firms to MR9
- Updating firms
- Adding contacts to MR9
- Updating contacts
- Adding locations to MR9
- Updating locations
- Setting up business units
- Updating business units
- Removing entities

Setup

Setup contains functions for customizing MR9 to your business. You can run your business using the setup defaults that MR9 includes. Or edit them, delete any you don't need, and add your own options to tailor MR9 to your work processes. You can update any Setup function at any time.

- Lists
- Users and Groups
- Chart of Accounts
- Service Item Subgroups
- Service Item Master
- Billing Rates
- Billing Sets
- Invoice Headers
- Invoice Messages
- Scopes
- Repository Descriptions
- States
- Tracking Steps
- Form Types and Groups
- Form Data List Templates
- Form Packages
- System Preferences

NOTE: Set up BUs first
Before you can use MR9, you must have at least one business unit (BU) set up for processing receivables. See Business Units.

Reference

- Business Units
- Quick setup
- Accounts receivable

Step-by-step instructions

- Customizing lists
- Creating user accounts
- Managing groups
- Customizing accounts
- Organizing service items
- Adding service items
- Setting up billing rates
- Setting up billing sets
- Setting up invoice headers
- Setting up invoice messages
- Managing scopes
- Managing states
- Defining tracking steps
- Customizing global preferences

Connect

MR Connect gives your clients and third parties access to your office through the internet and on mobile devices.

- Send Invitations
- Import Online Orders
- Publish COD Invoices
- Fulfill Points Redemption Orders
- Support Tickets
- Activity Log
- Connect Preferences

Step-by-step instructions

- Sending invitations
- Searching online orders
- Publishing COD invoices
- Fulfilling online reward point requests
- Resolving support issues
- Tracking MR Connect activities

Help

Access the full MR9 manual, training videos, KnowledgeBase, live support, support tickets, product suggestions, and basic MR9 info.

- User Guide
- Online Training
- Update History
- FAQ/KnowledgeBase
- Online Support
- Live Chat
- Report Issues
- Suggest Ideas
- About

TIP: Help is always available

Click the **Help** button on any function window to jump to the section of this manual that is relevant to the function you are using.

Reference

- Team Viewer

Step-by-step instructions

- Accessing the user guide
- Viewing MR9 updates
- Finding answers to your MR9 questions
- Using Team Viewer
- Live chatting with OMTI Support
- Reporting issues
- Searching ideas

MR9 personal options

Click your name at the top-right of the screen to access MR9's message center, change your password and other preferences, view information about locked data, clear your window, or log out of the program.

- Notifications and Messages
- Change Password
- Locked Data
- User Preferences
- Close All Tabs
- Log Out

Step-by-step instructions

- Communicating within MR9
- Updating your password
- Managing locked data
- Setting personal preferences
- Closing tabs
- Logging out of MR9

Appendices

This information includes a basic orientation to accounting principles and descriptions of what each MR9 report covers.

- Basic accounting
- Monthly reports at a glance

Program Basics

MR9 is an application that works within a browser on your desktop, laptop, or tablet. Information you store and access through MR9 resides on MR9 servers in the cloud. There is nothing to install on your own hardware.

MR9 comes with default settings so you can quickly start using it. Familiarize yourself with these MR9 basics first:

- Log in
- MR9 Interface
- Help
- MR9 personal options
- Quick Setup

NOTE: Automatic time-out

MR9 automatically times out after 20 minutes. Online timeouts are required for security reasons. MR9 does not save your work or remember which functions you were using, so be sure to **save your work frequently and especially before switching to a different a function or leaving your desk.**

Step-by-step instructions

- Logging into MR9
- Getting started

Quick Setup

MR9 comes with a built-in set of default values, forms, and templates that you can update at any time to better meet your needs. If you want to get started quickly, you only need to set up one thing: your company's Business Units (BUs).

IMPORTANT: One required set-up item

Before using MR9, you must set up at least one BU.

Reference

- Business Units
- Complete MR9 setup
- Modules & functions
- Program Basics

Step-by-step instructions

- Setting up business units

Log in

MR9 is a secure website that follows general security rules for business applications. Access to MR9 is through your company's MR9 web address in a browser using your assigned credentials. If you do not have a password, you can set one from the login page. If you do not have a user name for MR9, contact your system administrator.

MR9 is optimized to work in all of the common browsers in the following order:

Step-by-step instructions

- Logging into MR9
- Setting your password at log-in
- Verifying your device

MR9 Interface

MR9 has a simplified interface to make it load as fast as possible over the internet.

- Modules & functions
- Function layout
- Date Navigator
- Mail Composer
- Notes Logs
- Repository

Step-by-step instructions

- Searching in MR9
- Entering dates & times
- Emailing from MR9
- Making entries in notes logs

Logging into MR9

You can use MR9 anywhere you have internet access through a browser. All you need is your company's MR9 URL, your user name/email address and password.

TIP: Setting your password from the log-in page

If you don't have a password or forgot your password, you can set it yourself. See Setting your password at log-in.

NOTE: Worried about entering information in MR9?

Before you log into MR9, you can read our privacy policy by clicking its link on the login page. It links to the latest information on our website about how we handle your information on our sites.

1. Enter your company's MR9 URL. If you have MR Connect, click on the Portal page. Otherwise, be sure to enter the subpath "/office" at the end of your MR9 URL.
2. To sign in either:
   - **Enter your credentials**
     1. Enter your work email address or the login name assigned to you in **Email/Login Name.**
     2. Enter your password in **Password.**
     3. Click **Login.**
   - **Sign in with LastPass**

     If you have a LastPass account, you can store your MR9 login credentials in your vault, then apply them here.

     1. Click . (If you do not have an active LastPass account, this button is grayed out. You can click it to set up your Last Pass account.)
     2. Select your MR9 credentials in the dropdown.
     3. Click **Login.**
   - **Sign in with social media**

     If you have the option, you can sign in using your social media account by clicking one of the social media buttons (Facebook, Google+, LinkedIn, or Microsoft), then log into that account.
3. If the screen changes to Request Verification Code, see Verifying your device. Otherwise, the main MR9 web page appears.

4. Next time you visit the MR9 site on the same device, it will display the last user name/email address used so you will only have to enter your password.

NOTE: MR9 notifies you of overdue payments

If your designated credit card has expired and OMTI is unable to collect payment, the Login window will display a "License Expired" notice with instructions:

- **Before payment is 15 days overdue:** You can continue to use MR9 but you are requested to contact OMTI immediately to arrange payment before your service is suspended.
- **After 14 days:** You will not be able to log into MR9. Contact OMTI to arrange payment or click **PAY NOW.** See Paying invoices.

NOTE: Logging in for the first time

When you log in for the first time, the User Preferences window will open automatically, and you will be prompted to enter default information. See Setting personal preferences.

NOTE: Changing your credentials

You might not be able to change your assigned user login name (based on your company's MR9 setup) but you can change your password at any time.

TIP: Read what's in an update at your convenience

When MR9 updates, a list of what has changed automatically appears on the main MR9 web page the first time you log into the updated version. You can read the update information at that time or open other functions to work on instead. The update info is on a tab called "What's New" that you can click to access until you log out or close out the tab. To view what's in an update later, click **Help > Update History,** then click a release number to access the update. See Viewing MR9 updates.

TIP: Logging in using the dedicated subpath

If you log into Connect using the URL that ends with "/office" you skip step 1 in the login process.

Reference

- LastPass

Step-by-step instructions

- Setting your password at log-in
- Verifying your device
- Paying invoices
- Setting personal preferences
- Updating your password
- Viewing MR9 updates

Getting started

Before using MR9, orient yourself to the system so you can use MR9 efficiently.

- **For all users**

  See Program Basics.

- **For administrators**

  Also see Quick Setup.

Orders

Enter new cases into MR9 as *orders.* Then use the **Orders** function to find orders in a customizable results grid, with shortcuts to popular operations. It has search criteria so you can narrow results further.

Reference

- Order

Step-by-step instructions

- Starting orders
- Searching orders
- Customizing grids

Parts

Parts displays parts to an order in a customizable results grid, with shortcuts to popular operations. You can also quickly enter new parts to an order in this function.

Reference

- Order
- Part

Step-by-step instructions

- Adding parts to orders
- Updating parts
- Customizing grids

Tracking

Use **Tracking** to generate a *task list* (AKA to-do list or call list) which is a list of work orders (parts) to be worked on. Since every business operates differently, MR9 provides numerous filters to bring up work orders:

- For records retrieval, processing serving, or other types of records activity you have.
- That are currently at certain tracking steps.
- That are assigned to a particular individual.
- Based on part status.
- Based on certain actions taken within a date range.
- Based on part ordered date, due date, follow-up date, start date, waiver date, or scheduled date.
- That are part of a specific order.
- That belong to a particular processor, client rep, or runner.
- Based on location postal code or ROI Handled By.
- By schedule type, i.e. how order was received.
- For one or more business units.

Use Tracking to move parts through your workflow. You can also produce reports to document your process.

NOTE: Set up Tracking for your workflow

Before you can monitor parts as they move through your workflow, you must customize the module to fit into your process. Then you can track orders so you always know their current status.

Reference

- Lists > Tracking
- Tracking Steps
- Daily Tracking Summary
- Tracking Productivity Analysis

Step-by-step instructions

- Customizing lists
- Defining tracking steps
- Generating a task list
- Searching tracking

Notify Runners

Notify Runners assembles worksheets for assigned runners with all the pertinent information about the part which you can email or download to give to the runners.

Reference

- Part

Step-by-step instructions

- Notifying runners

Send Forms

With MR9’s built-in word processor, forms are automatically populated with data from your MR9 database for you to download, email, preview, or print either singly or bundled together into a package.

Reference

- Order

Step-by-step instructions

- Sending forms

Receive Records

If you have someone (such as a receptionist) who enters all of the received records as they open the daily mail, they can use this function instead of entering them in **Parts** or **Turn In.**

Reference

- Parts
- Turn In

Step-by-step instructions

- Receiving records
- Searching records

Daily Orders Audit

Quickly see how many orders been entered or canceled today or for any date range. You can also use MR9's Daily Orders Audit to review new entries for typos and other mistakes.

Reference

- Order

Step-by-step instructions

- Auditing work orders

Orders In Progress

Use **Orders in Progress** to analyze processors' workloads. Set up grouping by Processor, then Records Of to see the backlog of work orders each processor is working on, grouped by patient/subpoenaed witness, with the age (number of days old) for each work order. If you specify a Part Due Date range, only work orders having the same or prior due date will be listed.

Reference

- Order

Step-by-step instructions

- Analyzing work order progress

Processed Orders

Processed Orders is a report that lists all parts/work orders processed, i.e., entered or updated for the specified period, color coded by part status. “Processed” covers every stage a part goes through as it moves through your workflow.

Reference

- Part

Step-by-step instructions

- Monitoring processed orders

Orders Turnaround

Use **Orders Turnaround** to see how quickly parts/work orders were turned around and invoiced in a specified time period. See basic details about the parts and invoices at a glance.

Reference

- Part

Step-by-step instructions

- Analyzing work order turnaround

Order Analysis

Order Analysis reports show new and canceled orders by firm — broken down by contact — so you can see how many orders you are getting from each client.

TIP: Qualify clients by how many orders they generate

You can easily see who your best clients are by looking at the number of settings they generate. This is better for your marketing staff to know because total invoice amounts can be misleading — a lot of work is billed to third parties, such as insurance companies whom you don't market to, and a lot of a law firm's invoices might be copy orders on orders they didn't initiate.

Reference

- Order

Step-by-step instructions

- Knowing who is calling

Daily Tracking Summary

List all parts with completed steps within a specified period. Produce reports to document your day’s progress.

Reference

- Tracking

Step-by-step instructions

- Producing daily tracking summary

Order

An **order** in MR9 is usually a request for all records related to a case or to serve a subpoena for an appearance at a legal proceeding. This is different from a *work order* which is called a part in MR9 as it is part of an order. You can have multiple parts/work orders for a single order/case.

Reference

- Part

Step-by-step instructions

- Starting orders
- Searching orders
- Updating orders

Orders preferences

System-wide preferences and defaults for Orders functions.

- **Assemble Court**

  Options for the layout of and content — including merge fields — for cover sheets of documents for federal, state, and local cases.

- **Holidays**

  Days excluded from the business days included in calculating due dates for orders.

- **New Order**

  Defaults for new order settings.

- **Order Status Color**

  Defaults for order status color coding.

- **Part Status Color**

  Defaults for part status color coding.

- **Tracking Step Automation**

  Defaults for automatic tracking step updates.

- **Worksheet**

  Defaults for the email that accompanies worksheets sent to runners (field agents).

Reference

- Orders
- Part
- Tracking
- Notify Runners

Step-by-step instructions

- Customizing global preferences

Starting orders

You can quickly set up an order with only the scheduling client and MR9 defaults. Orders can be started from scratch, copied from an existing order, or added from a client's online request.

After setting up an order, add parties, create parts (work orders), print forms, request fee checks, call custodians, and receive records, all from within the order. When you get additional information, you can search for the order and enter it then.

Start a new order

You can start a new order in several ways:

- **From scratch**

  To enter orders that are not similar to an existing order — for example, when starting a new case — see Starting orders from scratch.

- **From an existing order**

  To create an order using information from an existing order — for example, when entering a new patient on a class action lawsuit — see Starting orders from existing orders.

- **From an MR Connect request**

  To import orders from MR Connect requests, see Importing orders from online requests.

Reference

- Order
- Part
- Scheduling Client
- MR Connect

Step-by-step instructions

- Starting orders from scratch
- Starting orders from existing orders
- Importing orders from online requests
- Searching orders

Searching orders

Find orders directly in your MR9 database using various search criteria. View order details, use shortcuts, and update information.

1. Set search criteria

1. **Orders > Orders**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:

   - **Order No.**

     Enter the entire order number.

   - **Party Type**

     Scheduling Party is the default. To search by another party to the order, select Other Party in the dropdown.

   - **Scheduling Firm/Other Firm**

     Click to restrict search to one firm's orders. See Looking up firms.

   - **Scheduling Contact/Other Contact**

     Click to restrict search to one contact's orders. See Looking up contacts.

   - **Ordered By**

     Click to restrict search to orders that a single contact is responsible for but not necessarily scheduled by them. See Looking up contacts.

   - **Case Name**

     Enter part of the related case's name.

   - **Case No.**

     Enter the related case's number.

   - **Case Type**

     Click to select one or more categories of cases in the **Lookup Case Type** popup. (Case Types are set in Lists > Orders.)

   - **Order Status**

     Stage the order is in, e.g., New or Cancelled. Default is ALL. Click to restrict the results. See Lookup panel. (Order Status options are set in Lists > Orders.)

- **Order Date From/Order Date To**

  Default is tomorrow's date. Click in these fields to enter a date range of when orders were placed in Date Navigator.

- **Records Of**

  Enter part of a patient's name — or witness if this is a subpoena.

- **Records Of SSN**

  Enter a patient's/subpoenaed witness's entire social security number.

- **Records Of DOB**

  Click in the field to enter a patient's/subpoenaed witness's date of birth.

- **Processor**

  Click to restrict search to orders that are assigned to a specific case coordinator. See Looking up users.

- **Parent Firm**

  Click to look up and select the firm's headquarters. See Looking up firms.

  TIP: Viewing orders of multiple-office firms

  If you have a client that has multiple offices, group them together by designating the main office as the *parent firm* of each of the offices (including the main office) in their firm set-up. That way you can search orders by the parent firm and see all of the related offices' orders in one results grid. See Adding firms to MR9.

- **Client Matter No.**

  Enter the full client matter number (a number designating the client combined with a number designating the case).

- **Custom Date Name**

  Select a type of date, such as depo or mediation, in the dropdown. (Custom date categories are set in Lists > Orders > Custom Date.) Works with **Custom Date From/Custom Date To** below.

- **Custom Date From/Custom Date To**

  After selecting a custom date name above, enter dates for the scheduled events in the fields or click to select dates in the Date Navigator.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to orders tied to specific BUs. See Lookup panel.

2. View results/use shortcuts

1. Click . All orders that meet the search criteria appear in the results pane color coded for order status. (Order Status Colors are set in System Preferences > Orders > Order Status Color.) The results grid is customizable (see Customizing grids).
2. Click a hyperlinked order to view details. To update the order, see Updating orders. Or use shortcuts in the results grid: Click the order's >

   - **View** – To open the order in its View window.
   - **Edit** – To update the order. See Updating orders.
   - **Delete** – To delete the order. In the popup that appears, click **Yes.**
   - **Copy Order without Parts** – To create a new order from the selected order without copying any of its parts. MR9 creates a new order and jumps to the **Records Of** pane. To enter the patient/subpoenaed witness information, see Entering patient & other records information.
   - **Copy Order with Parts** – To create a new order from the selected order that includes one or more of its parts. The **Select Parts** popup appears with any active parts selected. If you want to change which parts to copy, check the boxes of parts you want to copy. Then click **Save.** MR9 creates a new order and jumps to the **Records Of** pane. To enter the patient/subpoenaed witness information, see Entering patient & other records information.
   - **Parts** – To add, view, update, or turn in parts related to the order. See Adding parts to orders or Updating parts.
   - **Send Forms** – To email, preview, print, and download forms to clients or custodians. See Sending forms.

Reference

- Order
- Scheduling client
- Lists > Orders
- Lookup panel
- MR Connect
- Date Navigator
- Processor
- Parent Firm
- Business Units
- Order Status Color preferences

Step-by-step instructions

- Looking up firms
- Looking up contacts
- Looking up users
- Adding firms to MR9
- Using custom dates
- Customizing grids
- Updating orders
- Entering patient & other records information
- Adding parts to orders
- Updating parts
- Sending forms

Updating orders

When adding an order to your MR9 database or at any time later, you can add to or edit the order's information. You can also send order-related forms to clients and custodians, copy the order to create another order, add parts to the order, or delete the order in the Edit Order window.

1. Find the order

- If in a function with a **Records Of** or **Order No.** field, click its . Then in the View Order window, click **Edit.**
- If not already in the Edit Order window of an order you want to update, find the order in **Orders > Orders.** See Searching orders.
- If in the order's View Order window, click **Edit.**

TIP: Use Parts function to add parts quickly

If you just want to add parts to an order and you know the order number, you can skip the Orders function. Instead click **Orders > Parts** in the top menu. Then enter the entire order number in **Order No.** and click . The order's details appear in the **Order Info** pane so you can confirm you are adding parts to the correct order. See Adding parts to orders.

2. Update information

TIP: Update multiple orders at the same time

Save time updating information for multiple orders such as when the assigned client rep or processor changes by updating them all at the same time using **Bulk Update.** See Bulk updating orders.

1. Within an Edit Order window, you can update any information you entered, except notes entered in the Notes Log. They can only be canceled. See Canceling notes.
2. Add to or update:
   - **General**

     Basic order information, such as client name(s), order status, and warnings. See Entering general order information.
   - **Case**

     Information about the related case. See Entering case information.

Records Of

Patient/subpoenaed witness information, such as address, ID numbers, and date of birth. See Entering patient & other records information.

- #### Additional

  Other information related to the order, such as trial date, sales rep, and remarks. See Entering additional order information.

- #### Custom Dates

  Additional dates related to the order, such as scheduled depositions or mediation. See Using custom dates.

- #### Forms

  Full case style and court style as they will appear on documents related to this order, See Entering case & court styles.

- #### Parties

  Scheduling firm is automatically included in Parties. To add parties to the order, see Adding parties. To update an existing party's information, see Updating parties.

- #### Repository

  To add files to the order's repository, see Uploading files to a repository.

- #### Notes Log

  To make notes on the order and set reminders for following up, see Making entries in notes logs.

  #### TIP: Add a note to multiple orders at same time

  To add the same entry to more than one order's **Notes Log** at once, check the boxes in the **Orders** main page results pane of orders to select them. Then click **Actions > Add Notes Log.** See Making entries in notes logs.

3. ## Do more

   In the Edit Order window, click:

   - **Delete** – To delete the order. See Deleting orders.
   - **Parts** – To add/manage parts of the order. See Adding parts to orders or Updating parts.
   - **More >**
     - **Copy Order without Parts** – To copy only the order.

- **Copy Order with Parts** – To copy any parts along with the order. The **Select Parts** panel opens with any active parts selected. If you want to change which parts to copy, check the boxes of parts you want to copy. Then click **Save.** To change information in the copied part(s), see Updating parts.
- **Send Forms** – To email, preview, print, or download forms related to the order. See Sending forms.

4. ## Save order

   Click **Save >**

   - **Save & Edit** – To continue working on the same order.
   - **Save & Close** – To save your work and close the window.

Reference

- Order
- Notes Log

Step-by-step instructions

- Searching orders
- Adding parts to orders
- Bulk updating orders
- Canceling notes
- Entering general order information
- Entering case information
- Entering patient & other records information
- Entering additional order information
- Using custom dates
- Entering case & court styles
- Adding parties
- Updating parties
- Uploading files to a repository
- Making entries in notes logs
- Updating parts
- Sending forms
- Deleting orders

Adding parts to orders

Once an order is created and the parties entered, you can start creating parts (work orders) for the order. If an order already has parts, you can save time adding more parts by copying a part to create a new part for the same location and patient. Otherwise create parts from scratch. The only information you are required to enter in a part is the location.

TIP: Use Parts function to add parts quickly

If you know the order number, you can skip the Orders function. Instead click **Orders > Parts** in the main MR9 menu. Then enter the entire order number in **Order No.** and click . The order's details appear in the **Order Info** pane so you can confirm you are adding parts to the correct order.

Continued from Starting orders from scratch or Updating orders.

1. Start a new part

1. In a View Order/Edit Order window, click **Parts.**
2. Any parts already entered appear in the Parts results pane. To:
   - **Copy a part,** click **> Copy.** MR9 copies the information in the part's **General** pane into a new part. See Creating new parts from old parts.
   - **Create a part from scratch,** click **New.** MR9 includes only the patient/subpoenaed witness information from the **Records Of** pane of the related order. See Entering patient & other records information.

2. Enter required information

The only information you are required to enter in a part is the location where records are to be retrieved from/subpoena is to be served at. (If you copied a part to create this new part, the location is automatically filled in for you.) To enter the location, click the ***Location** field's in the **General** pane of a New Part window. See Looking up locations.

3. Enter part information (optional)

In the New Part window, not all fields are editable. You can enter more information now or later.

- **General**

  To enter basic information about the part, such as location and patient info, see Entering general part information.

- **Additional Info**

  To enter miscellaneous information about the part and add notes/remarks, see Entering additional part information.

- **Schedule Pickup**

  To enter information about a scheduled pickup, see Scheduling pickups.

- **Forms**

  To enter information for forms related to the part, see Setting up part forms.

- **Tracking**

  You cannot change the tracking step until you save the part.

4. ## Save the new part

   Click **Save >**

   - **Save & Edit** – Additional panes for **Services, Fee Checks, Repository,** and **Notes Log** appear, and the **Tracking** pane posts the default first step to be taken in the **Tracking Step** field. To continue adding information to the saved part, see Updating parts.
   - **Save & Close** – To save your work and close the window.
   - **Save & New** – To start a new part related to the same order. The part is assigned a part number, and is replaced in the New Part window with a new blank part that includes the same Records Of information.

Reference

- Order
- Part

Step-by-step instructions

- Starting orders from scratch
- Updating orders
- Creating new parts from old parts
- Entering patient & other records information
- Looking up locations
- Entering general part information
- Entering additional part information
- Scheduling pickups
- Setting up part forms
- Moving work to the next step
- Updating parts

Updating parts

When adding parts to an order or at any time later, you can add to or edit the part's information. You can also access related functions from within a part which will have the selected part's information already filled in to save time.

TIP: Save time by updating multiple parts at once

If you have multiple parts that need the same update, you can update them all at once. See Updating multiple parts at once.

Continued from Updating orders, Adding parts to orders, Auditing orders, Analyzing work order progress, Generating invoices, or Viewing & updating repository file details.

1. Find the part

If not already in a View Part/Edit Part window, see Finding parts.

2. Update information

If in a View Part window, click **Edit.** In the Edit Part window, add to or update:

- **General**

  For basic part information, such as the record location and part status, see Entering general part information.

- **Additional Info**

  To enter miscellaneous information, see Entering additional part information.

- **Schedule Pickup**

  To enter/update records pickup scheduling, see Scheduling pickups.

- **Forms**

  To enter/update form information, see Setting up part forms.

- **Tracking**

  To move the part to the next step or update existing steps, see Moving work to the next step.

- **Services**

  To enter/update services requested for the part, see Entering services to be billed.

- **Fee Checks**

  To enter/update requests for payment of custodians' fees for records for the part, see Entering & updating fee check requests in parts.

- **Repository**

  To upload any documents you have for the part to the part's repository, see Uploading files to a repository.

- **Notes Log**

  To make notes on the part and set reminders for following up, see Making entries in notes logs.

3. ## Do more

   Use shortcuts to open a part in other functions. Click **More >**

   - **Copy** – To create a new part that includes the information from the current part's **General** and **Forms** panes. See Creating new parts from old parts.
   - **Notify Runner** – To open the Notify Runner function with the part information already filled in. See Notifying runners.
   - **Send Forms** – To email, preview, print, or download forms related to the order. See Sending forms.
   - **Receive Records** – To create the record for the part with the order and part information filled in. In the popup that appears, click **Yes.** See Receiving records.
   - **Turn In** – To begin turning in the part. See Generating invoices.

   ### TIP: Skip the edit step for some functions

   Some **More >** functions are available in the View Part window. You can go directly to Notify Runners, Send Forms, Receive Records, or Turn In from the View Part window's **More >** options and they will have the part information already filled in.

4. ## Save the part

   When finished updating the part, click **Save >**

   - **Save & Edit** – To continue adding information to the saved part.
   - **Save & Close** – To save your work and close the window.

Reference

- Notes Log
- Notify Runners
- Send Forms
- Receive Records

Step-by-step instructions

- Updating multiple parts at once
- Updating orders
- Adding parts to orders
- Auditing orders
- Analyzing work order progress
- Monitoring processed work orders
- Generating invoices
- Viewing & updating repository file details
- Finding parts
- Searching orders
- Entering general part information
- Entering additional part information
- Scheduling pickups
- Setting up part forms
- Moving work to the next step
- Entering services to be billed
- Entering & updating fee check requests in parts
- Uploading files to a repository
- Making entries in notes logs
- Creating new parts from old parts
- Notifying runners
- Sending forms
- Receiving records

Generating a task list

Create task lists of work orders so you can see where parts are in your workflow and what needs to be done. Customize Tracking's results grid to show information in the way that works best for you, including grouping orders by additional/different criteria. For example group by location, then tracking step and due date to see all activities for each location in order and when due. Access other functions directly from the list.

1. Find work orders

1. **Orders > Tracking**
2. In the Tracking window, find current work orders using the search criteria. See Searching tracking.
3. Click . MR9 displays the results of your search.

2. Customize the results

Set up the results grid to show you work orders grouped by tracking step and/or other parameters.

1. Click **> Show Grouping Zone.**

3. The Grouping Zone appears above the column headers in the results grid. To group processed work orders by tracking step, drag the **Tracking Step** column header into the Grouping Zone.
4. MR9 will group the work orders by **Tracking Step.** You can group the results by additional or different column headers and change the sequence of displayed results. See Grouping results and Customizing grids.
5. If this is the primary way you will use Tracking, save your custom grid by clicking **> Save Grid Layout.**

6. Do more

You can update some options in multiple parts at the same time from the Tracking results grid, including changing the tracking step. See Updating multiple parts at once.

7. Update individual parts

Use shortcuts to view/update individual parts or open a part in other functions. Click **>**

- **View** – To open the part in its View window. (You can also click the hyperlinked **Order.Part No.** in the results grid to view the part.) To update the item from the View Part window, click **Edit**.
- **Edit** – To open the part in its Edit window. To update the part's tracking information such as moving it to the next step, see Moving work to the next step.
- **Request Check** – To generate a check request for the selected work order. See Entering & updating check request details.
- **Fee Checks** – To pull up all of the checks/credit card payments issued so far for the selected work order. See Managing fee checks.
- **Notify Runner** – To send a notification to the runner assigned to the selected work order. See Notifying runners.
- **Receive Records** – To enter the record for the part with the order and part information filled in. In the popup that appears, click **Yes.** See Receiving records.
- **Turn In** – To start the billing process for the selected work order. See Generating invoices.

5. ## Export/print results

   To export and save the task list, click and select an export file type. See Exporting & printing results.

6. ## Move work to next step

   When the work is completed in a part's current tracking step, "push" the part to the next step in the workflow. See Moving work to the next step.

Reference

- Part

Step-by-step instructions

- Searching tracking
- Grouping results
- Customizing grids
- Entering & updating check request details
- Managing fee checks
- Notifying runners
- Receiving records
- Generating invoices
- Exporting & printing results
- Moving work to the next step

Notifying runners (field agents)

After assigning runners, the next task in the daily scheduling of pickups is notifying runners. The Notify Runners function assembles all of the pertinent information from a work order, including any instructions or remarks entered in the **Pickup Notes** field, into an easy-to-read worksheet.

1. Select runners

1. **Orders > Notify Runners**
2. In the **Search By** pane, **Scheduled Date From/Scheduled Date To** default to today. Change the search criteria if needed:
   - **Scheduling Type**

     Default is ALL. Click to select one or more pickup methods. (Scheduling Types are set in Lists > Parts.)
   - **Scheduled Date from/Scheduled Date To**

     Enter dates in the fields or click to select dates in the Date Navigator.
   - **Order No.**

     Enter the order number tied to the records.
   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) for a single part of the order.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to work orders tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all scheduled work orders for the date range selected and other search criteria along with important information like the assigned runner, part status, and records location.
4. Select runners to notify by checking their boxes or checking the box in the header to select all.

2. Send/print worksheets

1. Click:
   - **Send Email** – To email runners their worksheets. See Emailing from MR9.

- **Print** – To print out worksheets to give to runners.

2. MR9 makes an automatic entry in the Part Notes Log when you email a runner the worksheet. See Making entries in notes logs.

NOTE: Set up your worksheet's email first

Before you can email worksheets to runners you must set up the automatic email that accompanies worksheets. See Worksheet preferences.

Reference

- Date Navigator
- Business Units
- Lookup panel
- Notes Log
- Worksheet preferences

Step-by-step instructions

- Scheduling pickups
- Emailing from MR9

Sending forms

Email, preview, print, and download forms one at a time or save time by using packages that contain multiple forms.

1. Select part(s)

1. To send forms with order and part information automatically filled in by MR9:
   - In **Orders > Send Forms,** enter the order number in **Order No.** and click .
   - In the results pane of **Orders > Orders,** click an individual order's **> Send Forms.** (See Searching orders.)
   - In a View Order/Edit Order window, click **More > Send Forms.** (See Updating orders.)
   - In the results pane of a Parts window, click an individual part's **> Send Forms.** (See Finding parts.) Or check multiple parts' checkboxes, then click **Actions > Send Forms.** (See Updating multiple parts at once.)
   - In a View Part/Edit Part window, click **More > Send Forms.** (See Updating parts.)
2. In the Send Forms window, all parts of the order that appears in the **Search By** pane are listed in the **Parts** pane. If the part(s) you want to send forms for are not selected, check their box(es) or check the box in the header to select all parts.

2. Prepare form(s)

- **To bundle multiple forms** into a single PDF file, see Sending forms using packages.
- **To send single forms,** see Sending forms individually.

Reference

- Form Packages

Step-by-step instructions

- Searching orders
- Sending forms using packages
- Sending forms individually
- Updating orders
- Finding parts
- Updating multiple parts at once
- Updating parts

Receiving records

As soon as records are received, you can enter the information in the Orders module to update the part status and upload files to the repository, even if the production department hasn't started paginating the records yet. The actual page count can be entered later when you do turn-in. You can also enter records in Turn In (see Adding records).

1. Check for existing records

1. Before entering a new record, you can review the existing records to prevent making duplicate entries. You can start the process of entering records in the **Orders** module in several ways:

   - **Orders > Receive Records**

     Before adding the record, you can check to see if there a duplicate entered already by searching the **Order No.** and **Part No.** in Receive Records. See Searching records.

   - **Orders > Parts**

     1. Enter the **Order No.** and click .
     2. Click a part's **> Receive Records.**
     3. If this is the first time you are receiving records for the part, a popup appears. Click **Yes.** If no popup appears, Receive Records' main page opens with all of the records received so far listed.

   - **Orders > Tracking**

     1. Find the part. See Searching tracking.
     2. Click the part's **> Receive Records.**
     3. If this is the first time you are receiving records for the part, a popup appears. Click **Yes.** If no popup appears, Receive Records' main page opens with all of the records received so far listed.

   - **Within a part**

     1. Find the part. See Finding parts.
     2. In the View/Edit Part window, click **More > Receive Records.**
     3. If a popup appears, click **Yes.** If no popup appears, Receive Records' main page opens with all of the records received so far listed.

2. Update any record listed by clicking its **> Edit** or clicking its hyperlinked **Order.Part No.,** then clicking **Edit** in the View Record window. See Entering information about records received.

2. Enter new record(s)

1. If there is no duplicate record in the grid, click **New.**
2. In the New Record window, enter the ***Order No.** and ***Part No.** (no need to include leading zeroes) if they are blank. Then click .
3. MR9 automatically fills in the **Order Info** pane and the **Record Info** pane appears.

3. Enter record details

In the **Record Info** pane, enter or update information. Usually the production department will enter the page count during Turn In but you can enter it now, if known. See Entering information about records received.

4. Save

1. Click **Save >**
   - **Save & Edit** – To continue working on the same record submission. The submission is saved and the **Repository** pane appears.
   - **Save & Close** – To save your work and close the window.
   - **Save & New** – To start a new record submission. The current submission is saved and replaced in the New Record window with a new blank record that includes the same order information.
2. **Part Status** in the Edit Record window's **Order Info** pane updates to Records Obtained.

TIP: Enter records in batches

If you have multiple records to enter for the same part/work order, use the **Save & New** option when saving the records to keep the New Record window open with the same order and part information.

5. Upload records to repository

After saving the record(s), a **Repository** pane is added to the Edit Record window. To upload files associated with the record, see Uploading files to a repository.

Reference

- Date Navigator
- Lists > Parts

Step-by-step instructions

- Adding records
- Searching records
- Searching tracking
- Finding parts
- Entering information about records received
- Uploading files to a repository

Auditing work orders

View new work order settings daily to check for errors.

1. Find work orders

1. **Orders > Daily Orders Audit**
2. In the **Search By** pane, **Activity Type** defaults to In Progress, and the date range defaults to today. Change the search filters as needed, then click .

   - **Activity Type**

     Stage the order parts are in. (Stages are set in Lists > Parts > Action Type.)

   - ***Activity Date From/*Activity Date To**

     Required. Default is today. Change date range, if desired. See Date Navigator.

   - **Processor**

     Case coordinator for the parts. Default is all users. To see a single processor's work orders, click . See Looking up users.

   - **Client Rep**

     Default is all users. To see a single client rep's work orders, click . See Looking up users.

   - **Assign To**

     Default is all users. To see a single user assigned responsibility for current tracking steps, click . See Looking up users.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to order parts tied to specific BUs. See Lookup panel.

2. Check report for errors

1. MR9 lists all of the parts/work orders that meet the specified search condition(s). At a glance you can see:

   - **Order.Part No.**

     To view more details, click the hyperlinked order part number. See Updating parts.

- **Location**

  Where records are to be retrieved from.

- **Activity Type**

  What stage the part is in

- **Activity Date**

  Date the part entered the stage listed under **Activity Type.**

- **Part Status**

  Where the part order is in your production cycle.

- **Part Rush**

  Checked if the part order is a rush.

- **Records Of**

  Patient name — or witness if this is a subpoena.

- **Processor**

  User who is the case coordinator for the order.

- **Client Rep**

  User who represents the client who placed the order.

- **Assign To**

  User who is assigned to the work order's current tracking step.

- **Scheduling Firm/Scheduling Contact**

  Client who placed the order for records or other services.

- **BU**

  Part of your business responsible for invoicing the order.

2. The Daily Orders Audit's results grid layout is customizable. To rearrange columns and sorting order in your report, see Customizing grids. You can save your customizations so whenever you use Daily Orders Audit, your report will look the way you want it to.

3. View/update part details

1. If you want to view details or make changes to a part, click its:
   - **> View** or hyperlinked **Order.Part No.** to view the part.
   - **> Edit** to edit the part. Or **> View** or the hyperlinked **Order.Part No.** In the View Part–[#] window, click **Edit.**

2. To make changes to the part, see Updating parts.

4. Export/print report

To export and save the results, click and select an export file type. See Exporting & printing results.

BEST PRACTICES: Audit new orders daily

At the end of each day, spend a few minutes auditing new order settings for errors.

Reference

- Order
- Part
- Lists > Parts
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Customizing grids
- Customizing lists
- Looking up users
- Updating parts
- Exporting & printing results

Analyzing work order progress

Use the default setting to view all outstanding parts/work orders grouped by patient/subpoenaed witness, or use search filters to see a single processor's To-Do list, a single client's outstanding orders, or other criteria. Customize the results grid to show information in the order that works best for you, including grouping orders by additional/different criteria. For example group by Processor to analyze processor's work loads in relation to each other.

You can also update parts with their current status and other information as they progress and are completed. And enter notes to parts logs either individuallly or in bulk.

1. Find outstanding work orders

1. **Orders > Orders in Progress**
2. In the **Search By** pane, no specific filter is required. Click to see all outstanding parts or use the search filters to restrict the results:

   - **Order Status**

     Default is ALL. To view outstanding parts for orders in particular phases of your production cycle, click and select one or more options in the **Lookup Order Status** popup. See Lookup panel. (Order Status options are set in Lists > Orders.)

   - **Part Status**

     Default is ALL. To view outstanding parts in particular phases of your production cycle, click and select one or more options in the **Lookup Part Status** popup. See Lookup panel. (Part Status options are set in Lists > Parts.)

   - **Part Order Date From/Part Order Date To**

     A part order date is the date you entered the part in the system (default) or a date you entered manually for the part. Default search is all days up to today. Change date range, if desired, in Date Navigator.

   - **Part Due Date From/Part Due Date To**

     Deadline date or date range for outstanding parts you are expecting records to be retrieved by. Default is all days. Change date range, if desired, in Date Navigator.

   - **Processor**

   - Case coordinator. Default is all users. To see a single processor's To-Do list, click . See Looking up users.

   - **Client Rep**

     Default is all users. To see a single client rep's list, click . See Looking up users.

Assign To

- Default is all users. To see a single user's list, click . See Looking up users.
- #### Scheduling Firm

  Default is all firms requesting records/services. Click to restrict search to tasks for one firm's orders. See Looking up firms.

- #### Scheduling Contact

  Default is all contacts requesting records/services. Click to restrict search to tasks for one contact's orders. See Looking up contacts.

- #### Business Units

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to orders tied to specific BUs. See Lookup panel.

3. Click .

2. Review outstanding work orders

MR9 lists all of the parts that meet the specified search condition(s). The default is that all parts are grouped by **Records Of,** with each record's parts' **Days Old** (number of days since being ordered) averaged in the footer of their grouping. At a glance, you can see:

- #### Order.Part No.

  To view more details, click the hyperlinked order part number. See Updating parts.

- #### Location

  Where records are to be retrieved from.

- #### Part Order Date and Due Date

  When the part was ordered and when its records are due.

- #### Days Old

  Number of days since the order was entered into MR9. The **Days Old** column is calculated using the number of business days since the **Order Date.**

- #### Part Status

  Where the part order is in your production cycle.

- #### Part Rush

  Checked if the part order is a rush.

- **Assign To**

  User who is responsible for obtaining the records/serving the subpoena.

- **Order Status**

  Where the part's order is in your business cycle.

- **Processor**

  User who is the case coordinator for the order.

- **Client Rep**

  User who represents the client who requested the order.

- **Scheduling firm and contact**

  The client who requested the order.

- **BU**

  Part of your business responsible for invoicing the order.

3. ## Analyze workloads

   Set up the results grid to show you work orders by processor — so you can analyze everyone's workloads — or by other parameters.

   1. Click **> Show Grouping Zone.**
   2. The Grouping Zone appears above the column headers in the results grid with the parameters being used to group the results and sort the groups. For example, the default grouping for Orders in Progress is by **Records Of** in alphabetical order. To group work orders by processor, drag the **Processor** column header into the Grouping Zone and drag it to the leftmost side of the zone.
   3. MR9 will group the work orders by **Processor** broken down by **Records Of** in each processor's list. You can group the results by additional or different column headers and change the sequence of displayed results. See Grouping results and Customizing grids.
   4. If this is the primary way you will use Orders in Progress, save your custom grid by clicking **> Save Grid Layout.**
   5. If desired, you can export the results to an external file by clicking and selecting an export file type. See Exporting & printing results.

4. ## Bulk update parts

   If you have a group of parts that you are updating to the same status and/or you want to add an entry to their Notes Logs, you can update them all at the same time. Check

the boxes of parts you want to update, then click **Actions >**

- **Add Part Notes Log** – To add the same entry to each part's Notes Log. See Making entries in notes logs.
- **Change Part Status** – To update the status of all selected parts to the same status. See Changing order or part status.

5. ## View details & update individual work orders

   View part details. Update milestones and other information.

   1. In the Orders in Progress results grid, If you want to view details or make changes to a part, click its:
      - **> View** or hyperlinked **Order.Part No.** to view the part.
      - **> Edit** to edit the part. Or **> View** or the hyperlinked **Order.Part No.** In the View Part–[#] window, click **Edit.**
   2. To make changes to the part, see Updating parts.

Reference

- Lookup panel
- Lists > Orders
- Lists > Parts
- Date Navigator
- Processor
- Client Rep
- Business Units

Step-by-step instructions

- Looking up users
- Looking up firms
- Looking up contacts
- Updating parts
- Grouping results
- Customizing grids
- Exporting & printing results
- Making entries in notes logs
- Changing order or part status

Monitoring processed work orders

View the status of all parts/work orders that have been processed/updated in your system during a specific time frame. See important information about the parts — including invoice dates — at a glance. You can customize the results grid — including grouping work orders by specific criteria — and save your customization. For example group by part status to see all work orders in the same stage. View, edit, copy, and perform other functions on individual work orders from within the report.

1. Find processed work orders

1. **Orders > Processed Orders**
2. Click to see parts for all orders — except those with the order status of Completed — and with every part status except Cancelled or Request New that were processed today or modify the search criteria before searching:

   - ***Part Order Date From/*Part Order Date To**

     Required. Default is today. Change date range, if desired, in Date Navigator.

   - **Processor**

     Case coordinator for the parts. Default is all users. To see a single processor's work orders, click . See Looking up users.

   - **Client Rep**

     Default is all users. To see a single client rep's work orders, click . See Looking up users.

   - **Assign To**

     Default is all users. To see a single user assigned responsibility for current tracking steps, click . See Looking up users.

   - **Order Status**

     Stage the order is in, e.g., New or Cancelled. Default is all stages except Completed. Click to restrict the results. See Lookup panel. (Order Status options are set in Lists > Orders.)

   - **Part Status**

     Stage the part is in, e.g., New or In Progress. Default is all stages except Cancelled and Request New. Click to restrict the results. See Lookup panel. (Part Status options are set in Lists > Parts.)

TIP: Check for online order requests

If you offer clients the ability to schedule orders through MR Connect, select Request New and Request Cancel in **Part Status** to make sure you have not overlooked any client online requests.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to order parts tied to specific BUs. See Lookup panel.

3. Click .

2. Review processed work orders

MR9 lists all processed work orders that meet your search criteria in chronological order, oldest first. At a glance you can see:

- **Part Order Date**

  When the part was ordered.

- **Order No.**

  The number assigned by MR9 to the part's order/case.

- **Records Of**

  Patient/subpoenaed witness name.

- **Processor**

  User who is the case coordinator for the order.

- **Client Rep**

  User who represents the client who requested the order.

- **Order Status**

  Where the part's order is in your business cycle.

- **Part No.**

  To view more details, click the hyperlinked part number. See Updating parts.

- **Location**

  Where records are to be retrieved from.

- **Record Type**

  Category of records you are seeking.

- **Part Status**

  Where the part is in your production cycle.

- **Assign To**

  User who is assigned to the work order's current tracking step.

- **Invoice Date**

  If the part has been invoiced, the date will appear here.

- **BU**

  Part of your business responsible for invoicing the order.

3. ## Customize the report

   Set up the results grid to show you work orders grouped by part status and/or other parameters.

   1. Click **> Show Grouping Zone.**
   2. The Grouping Zone appears above the column headers in the results grid. To group processed work orders by part order date, drag the **Part Status** column header into the Grouping Zone.
   3. MR9 will group the work orders by **Part Status.** You can group the results by additional or different column headers and change the sequence of displayed results. See Grouping results and Customizing grids.
   4. If this is the primary way you will use Processed Orders, save your custom grid by clicking **> Save Grid Layout.**
   5. If desired, you can export the results to an external file by clicking and selecting an export file type. See Exporting & printing results.

4. ## View details & update individual work orders

   View part details. Update milestones and other information.

   1. In the Processed Orders results grid, click a **Part No.** hyperlink to view details. MR9 opens the selected work order's View Part window.
   2. To make changes to the part, see Updating parts.

Reference

- Date Navigator
- Lookup panel
- Processor
- Client Rep

MR Connect

- Business Units

Step-by-step instructions

- Looking up users
- Updating parts
- Grouping results
- Customizing grids
- Exporting & printing results

Analyzing work order turnaround

See part turnaround and invoice information for a specified time period.

1. Find invoiced work orders

1. **Orders > Orders Turnaround**
2. Click to see all invoiced parts for all orders — except those with the order status of Completed — and with every part status except Cancelled or Request New that were ordered and invoiced today, or modify the search criteria before searching:
   - ***Part Order Date From/*Part Order Date To**

     Required. Default is today. Change date range, if desired in Date Navigator.
   - **Party Type**
     - **Bill To Firm** – Default. The party responsible for paying the invoice.
     - **Sold To Firm** – The ordering party.
   - **Firm**

     Default is all firms. To see a single firm's invoiced work orders, click . See Looking up firms.
   - **Order No.**

     Enter the entire order number to see a single order's invoiced parts.
   - **Order Status**

     Stage the order is in, e.g., New or Cancelled. Default is all stages except Completed. Click to restrict the results. See Lookup panel. (Order Status options are set in Lists > Orders.)
   - **Part Status**

     Stage the part is in, e.g., New or In Progress. Default is all stages except Cancelled and Request New. Click to restrict the results. See Lookup panel. (Part Status options are set in Lists > Parts.)
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoiced parts tied to specific BUs. See Lookup panel.
3. Click .

2. ## Review invoiced work orders

   MR9 lists all invoiced work orders that meet your search criteria by **Bill To Firm** in alphabetical order. At a glance you can see:

   - **Bill To Firm/Bill To Contact**

     Client responsible for paying the invoice

   - **Order.Part No.**

     To view more details, click the hyperlinked part number. See Updating parts.

   - **Records Of**

     Patient/subpoenaed witness name

   - **Location**

     Where records are to be retrieved from.

   - **Record Type**

     Category of records you are seeking.

   - **Part Order Date**

     When the part was ordered.

   - **Part Status**

     Where the part is in your production cycle.

   - **Part Rush**

     Checked if the part was a rush order.

   - **Record Obtained**

     Date the records sought by the work order were obtained.

   - **Turnaround Day**

     Number of days from the part being entered into the system to its records being obtained.

   - **Invoice No.**

     Number assigned by MR9 to the invoice.

   - **Invoice Date**

     Date the part was billed.

   - **Invoice Amount**

     Total amount billed

- **Void Date**

  If the invoice was voided, the date will appear here.

- **Claim No.**

  Insurance claim number

- **Order Status**

  Where the part's order is in your business cycle.

- **BU**

  Part of your business responsible for invoicing the order.

3. ## Customize the report

   The Orders Turnaround results grid layout is customizable. To rearrange columns and sorting order in your report, see Customizing grids. You can save your cusomizations so whenever you use Orders Turnaround, your report will look the way you want it to.

4. ## Export/print the report

   To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Business Units

Step-by-step instructions

- Customizing grids
- Exporting & printing results

Knowing who is calling

Create this report to share with the appropriate departments in your business that shows which contacts at which firms are scheduling and canceling orders. Or view this information as a snapshot to quickly see who your best clients are.

1. Set parameters

1. **Orders > Order Analysis**
2. The **Part Order Date** range defaults to the past 30 days. Change the search filters as needed, then click .

- **View Option**

  By Month – Displays a snapshot of scheduled, canceled, and net orders by firm and firm contacts, broken down into month-, quarter-, and year-to-date totals.

  Summary – Default. Displays as a report the total amounts of scheduled, canceled, and net orders by firm and each firm's contacts for the date range entered in **Date From/Date To.**

- **Show Quarterly**

  By Month only

  Default is No. When viewing the report with **Expand/Collapse > Expand Date,** orders will be displayed by month and year only. Slide to Yes to add quarter view to month and year views.

- **Sort By**

  Firm and Contact Name – *Summary only.* Displays the results in alphabetical order.

  Number of Net – Default. Displays firms in descending order of scheduled orders minus canceled orders.

- ***Part Order Date From/*Part Order Date To**

  Date range defaults to 30 days ago to today. Change date range, if desired, in Date Navigator.

- **Scheduling Firm**

  Leave blank unless you want to analyze the order settings for a particular firm who ordered records or services. To select a firm, see Looking up firms.

- **Client Rep**

  Click to restrict search to contacts who are designated as clients of a specific

client representative. See Looking up users.

- **Sales Rep**

  Click to restrict search to contacts who are commissionable to a specific sales representative. See Looking up users.

- **Order Status**

  Stage(s) of orders requested by clients. Click to restrict search to specific order stages. See Lookup panel. (Status options are set in Lists > Orders.)

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to order settings tied to specific BUs. See Lookup panel.

2. ## View results

   MR9 totals new, canceled, and net orders by firm, broken down by contact, so you can see how many orders you are getting from each client. Net orders are displayed as both a number and a percentage.

   The search criteria used to generate the Summary report appear at the bottom of each page of the report above the timestamp.

   For by-month reports, see Using interactive reports.

3. ## Export/print results

   For summaries, see Printing invoices, statements, & reports.

   For by-month reports, see Exporting & printing results.

TIP: Holiday gift list

The best way to come up with a meaningful holiday gift list is to run the Order Analysis report sorted by the number of net orders. Then you will know which clients are generating the most business for your firm and to whom you want to send gifts of appreciation.

Reference

- Date Navigator
- Lookup panel
- Lists > Orders
- Business Units

Step-by-step instructions

- Looking up firms
- Looking up users
- Using interactive reports
- Printing invoices, statements, & reports
- Exporting & printing results

Producing daily tracking summary

Use the Daily Tracking Summary to list all parts with completed workflows or tracking steps within a specified period. Fix any errors on the spot. Produce reports to document your day's progress.

1. Set search criteria

1. **Orders > Daily Tracking Summary**
2. In the **Search By** pane, click to create a report of all tracking items/workflows finished today. Or specify the following search filters before clicking :
   - **Finished Level**
     - **Tracking Item** – Default. Aerial view of tracking. Displays each workflow completed in the date range below.
     - **Tracking Step** – More detailed view. Displays every completed step that meets your search criteria (a single part might appear on several lines to take into account all the steps it has gone through in the date range below).
   - ***Finished Date From/*Finished Date To**

     Required. Date range of completed items/steps.
   - **Processor**

     Case coordinator. Default is blank. To restrict results to one user, click . See Looking up users.
   - **Step Assign To**

     Tracking Step Finished Level only

     MR9 user responsible for completing steps. Default is blank. To restrict results to one user, click . See Looking up users.
   - **Tracking Item**

     Default is ALL. Types of items/workflows that you monitor. (Tracking Item categories are set in Lists > Tracking.)
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to parts tied to specific BUs. See Lookup panel.

2. **View completed steps**

   MR9 lists all of the parts that meet the specified search condition(s). At a glance you can see:

   - **Order.Part No.**

     To view more details, click the hyperlinked part number. See Updating parts.

   - **Location**

     Where records are to be retrieved from.

   - **Part Order Date**

     When the part was ordered.

   - **Part Due Date**

     The part's deadline for obtaining records

   - **Part Status**

     Where the part is in your production cycle.

   - **Processor**

     User who is the case coordinator for the order.

   - **Tracking Item**

     Type of item tracked.

   - **Tracking Start Date/Tracking Finish Date**

     Tracking Item Finished Level only

     Timeframe for completing the tracked item

   - **Tracking Step**

     Tracking Step Finished Level only

     Stage in your workflow where the tracking item is.

   - **Step Start Date/Step Finish Date**

     Tracking Step Finished Level only

     Timeframe for completing the tracking step

   - **Step Due Date**

     Tracking Step Finished Level only

     Deadline for completing the tracking step

   - **Step Assign To**

     Tracking Step Finished Level only

Who is responsible for completing the tracking step

- **Case Name**

  Name of the case the part's order is for

- **Scheduling Firm/Scheduling Contact**

  Client who ordered records/services

- **BU**

  Part of your business responsible for invoicing the order.

3. ## Update tracking

   If you notice any errors or want to move an item to the next step, click its hyperlinked part number. See Updating parts.

4. ## Export/print report

   To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Tracking
- Tracking Item
- Processor
- Lookup panel
- Lists > Tracking
- Business Units

Step-by-step instructions

- Looking up users
- Updating parts
- Printing invoices, statements, & reports

Turn In

Turn In is a 2-part process. First, your production staff compiles invoices for all parties ordering services on a part of an order. Then, your billing staff fills in the financials and finalizes the invoices.

Reference

- Parties
- Service items
- Order
- Part

Step-by-step instructions

- Generating invoices
- Searching Turn In
- Creating invoices for multiple parts at once
- Finalizing invoices

Production Sheets

This report tells the production staff what service items are needed and how many units to produce.

Reference

- Service items

Step-by-step instructions

- Generating production sheets

Envelopes and Labels

Print addresses on a variety of labels and envelopes for contacts, firms, or locations using information from MR9's database. Or create labels and envelopes manually for one-off printing. Use MR9 default label and envelope layouts or create your own custom layouts.

Reference

- Label Templates

Step-by-step instructions

- Setting up for online label printing
- Printing envelopes and labels

Shipping

When clients call to find out where their order is, you don’t have to leave MR9 to check the shipping status. You can keep track of when and via what method you send orders out — even print labels and follow up an order’s current location if sent via FedEx or UPS. You can also update the part status of any shipped order.

Step-by-step instructions

- Shipping to clients
- Searching shipping
- Tracking shipments

Repository

MR9 has multiple **repositories** where you store files for safekeeping and quick retrieval. The Repository function includes multiple search filters so you can instantly find files within one or more repositories. This can save you time over searching for files within individual entities in other functions. If you have MR Connect, you can give clients access to specific repository files.

TIP: Go paperless

If you receive hard copies of any important papers — such as notices, signed copy orders or delivery slips — scan and upload them to the appropriate repository.

Repository level	Where to upload	What to upload	If published, who can access through MR Connect
Order	Orders	• Pre-discovery documents • Quotes • Order Forms • Waiver responses	• Any contact listed in an order's Parties pane with the **Allow Order-level repository access in Connect** set to Yes • Scheduling contact
Part	Parts	• Custodian-related documents • Fee checks	• Any contact listed in an order's Parties pane with the **Allow Part-level repository access in Connect** set to Yes • Scheduling contact
Record	Record	• Actual records received • Delivery receipts	• Any contact listed in an order's Parties pane with the **Allow Record-level repository access in Connect** set to Yes
Invoice	Billing	Invoices	Sold To contact associated with the invoice

Firm	Firms	• Quotes • Contracts	Everyone in the firm
Contact	Contacts	• Quotes • Contracts	The contact and any contacts granted access to this contact
Location	Location	For hospitals and doctors' offices, Patient Authorization Forms	Do not publish (for office use only)

Reference

- MR Connect
- Orders
- Sold To
- Firm
- Contact
- Location

Step-by-step instructions

- Using repositories
- Uploading files to a repository
- Searching repositories
- Downloading & viewing files
- Viewing & updating repository file details

Production preferences

System-wide preferences and defaults for Production functions.

- **Envelopes**

  Defaults for printing envelopes from MR9.

- **FedEx Account for Shipping Labels**

  Federal Express account information for printing labels and tracking shipments within MR9.

- **Repository Logging**

  Preferences for logging all file download activities as required by general security rules for business applications.

- **UPS Account for Shipping Labels**

  United Parcel Service account information for printing labels and tracking shipments within MR9.

Reference

- Production
- Envelopes and Labels
- Shipping
- Repository

Step-by-step instructions

- Customizing global preferences

Production

In addition to processing orders, production also ships completed orders.

For how to set up lists, see Customizing lists.

- **Delivery Method**

  Designation specifying the way products are delivered to clients, e.g., UPS or Courier. Used in order parties' requested services, contacts' and firm's preferred services, plus in Shipping.

Reference

- Shipping

Step-by-step instructions

- Customizing lists
- Entering preferred or requested services
- Adding standing requests
- Shipping to clients

Generating invoices

In Turn In, you begin the billing process by entering information about the records received, ordering parties, firms to bill, and services ordered. Turn In usually begins when your production department receives a tracking alert indicating that records have been received and are ready to be produced for a particular work order.

1. Find part

To find the part you will turn in:

- **In Production > Turn In,** enter the **Order No.** you received an alert for or use the search criteria. See Searching Turn In.
- **In Parts or Tracking results grids,** enter the **Order No.** you received an alert for or use the search criteria. Then click the part's **> Turn In.** See Finding parts, Updating multiple parts at once, or Searching tracking.
- **In a View Part/Edit Part window,** click **More > Turn In.** See Updating parts.

TIP: Save time with Bulk Turn In

If you are turning in multiple parts for the same order — for example to close out the order when the case settles — save time by using **Bulk Turn In** to generate invoices for all of the parts at once. See Creating invoices for multiple parts at once.

2. View details

1. In the View Turn In/Edit Turn In - [#] window, you can verify that you are adding records to the correct part — and if necessary view and update part and order details by clicking next to:
   - **Order.Part No.**

     To view/edit order part details. See Updating parts.
   - **Records Of**

     To view/edit the related order's details. See Updating orders.
2. Click **Edit** if in the View window.

3. Add record(s)

The first step is to enter records obtained for the part in the **Records** pane of the Turn In - [#] window that were not previously entered. You can also update information for existing records and upload files. See Adding records.

4. ## Add parties

   After adding a record to the part, and appear on the **Invoices** pane in the Edit Turn In - [#] window. To add parties and generate invoices, see Adding ordering parties. You cannot add parties to a part without adding records first.

   After adding ordering parties, designate which one(s) ordered the original records.

   ### NOTE: Restrict individual contacts' access to a file

   After you add parties, you can turn off specific contacts' online access to specific files in the Record-level repository of the order. For example if Record A has a medical record, billing records, and exhibits in the repository, you can designate that Contact 1 can access only the medical records and exhibits, while Contact 2 can access only the billing records. See Restricting contacts' file access.

5. ## Add services

   With invoices started for all parties to an order, add services requested and prepare invoices. See Adding & updating services.

6. ## Enter billing information

   Populate invoices with client and 3rd-party billing information, choose invoice messages, upload repository files, and enter notes. See Adding billing information to invoices.

7. ## Set invoice headers & messages

   Optional. Instead of the default MR9 header and message, you can apply your own custom text to one or more of the invoices being prepared at once. See Selecting invoice headers and Selecting invoice messages.

NEXT: All service items produced? Then finalize invoices

In addition to generating invoices for all ordering parties to an order, your production staff produces any service items requested (see Generating production sheets), sends produced items to clients (see Shipping to clients), and checks them off as produced on the invoice (see Adding & updating individual service items). Then your billing staff finalizes the invoices.

Reference

- MR Connect
- Notifications and Messages

Step-by-step instructions

- Defining tracking steps
- Searching Turn In

- Updating parts
- Finding parts
- Updating multiple parts at once
- Searching tracking
- Creating invoices for multiple parts at once
- Communicating within MR9
- Updating orders
- Adding records
- Adding ordering parties
- Restricting contacts’ file access
- Adding & updating services
- Adding billing information to invoices
- Selecting invoice headers
- Selecting invoice messages
- Generating production sheets
- Shipping to clients
- Adding & updating individual service items
- Finalizing invoices

Generating production sheets

After all records are turned in for the day, production sheets can be printed. This report tells the production staff what service items are needed and how many units to produce.

1. Set parameters

1. **Production > Production Sheets**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:

   - **Received Date From/Received Date To**

     Default is today. Enter the date(s) the records were received, or click to look up date(s) in the Date Navigator.

   - **Order No.**

     Enter the order number.

   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to find record(s) for a single part of an order.

   - **Tracking Item**

     Default is ALL. Click to restrict search to records tied to specific types of tracked items, such as records or process serving. See Lookup panel. (Tracking Items are set in Lists > Tracking > Items.)

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to orders tied to specific BUs. See Lookup panel.

2. View results

Click . MR9 lists all of the parts that have been turned in and meet the specified search condition(s) as a report, one **Order.Part No.** per sheet with each part's associated received record(s) listed along with its service item(s) to be fulfilled.

3. Export/print results

Export the report to save it and/or edit it in another application, or print it. See Printing invoices, statements, & reports.

NEXT: Ship items produced

After producing items, use the Shipping function to send items to clients (see Shipping to clients), and check them off as produced on the invoice (see Adding & updating individual service items). Then your billing staff finalizes the invoices.

Reference

- Service items
- Date Navigator
- Lookup panel
- Lists > Tracking > Items
- Business Units
- Tracking

Step-by-step instructions

- Searching in MR9
- Printing invoices, statements, & reports
- Shipping to clients
- Adding & updating individual service items
- Finalizing invoices

Printing envelopes and labels

Print DYMO labels for correspondence and packages, or generate a PDF file to print addresses directly on envelopes.

1. Designate recipient(s)

1. **Production > Envelopes and Labels**
2. In Envelopes and Labels window **Search By** pane's **For** dropdown, select the type of recipient for whom you want to create label(s):

   - **Manual**

     Default. If you are making a one-off label for an address that is not in your MR9 database, enter recipient name and address in blank label in **Recipient** pane.

   - **All Locations for Order No.**

     Enter an order number in **Order No.,** then click . MR9 will list all of the locations for the order in label format in the **Recipient** pane.

   - **All Sold To for Order No.**

     Enter an order number in **Order No.,** then click . MR9 will list all of the Sold To contacts for the order in label format in the **Recipient** pane.

   - **Contact**

     Can use either or both fields:

     Firm – Click to find a firm's contacts. See Looking up firms. MR9 will list all of the firm's contacts with their default address(es) in label format in the **Recipient** pane.

     Contact – Click to look up a contact. See Looking up contacts. The contact and their default address appear in label format in the **Recipient** pane.

   - **Firm**

     Click to look up a firm. See Looking up firms. MR9 will list all of the firm's contacts with their default address(es) in label format in the **Recipient** pane.

   - **Location**

     Click to look up a location. See Looking up locations. The location's address appears in label format in the **Recipient** pane.

- **Order Parties**

  Enter an order number in **Order No.,** then click . MR9 will list all of the parties to the order with their default address(es) in label format in the **Recipient** pane.

3. If **Send To** field appears in the **Search By** pane, you can switch to a different address for the recipient(s) by selecting an address type in the dropdown, then clicking :

   - **Firm Address**

     Entity's business address. Default for firms, contacts, order locations, sold to contacts, and order parties.

   - **Billing Address**

     Address designated by entity for receiving invoices

   - **Home Address**

     Entity's personal residence address

   - **Shipping Address**

     Address designated by entity for receiving mail

4. Check the box(es) in the **Recipient** pane of any address(es) for which you want to create labels.

2. Print label(s)/envelope(s)

- To print labels, see Printing labels.
- To print envelopes, see Printing envelopes.

Reference

- PDF
- DYMO
- Sold To vs. Bill To

Step-by-step instructions

- Setting up for online label printing
- Looking up firms
- Looking up contacts
- Looking up locations
- Printing labels
- Printing envelopes

Shipping to clients

When sending completed service items to clients, print FedEx or UPS labels from within MR9 and you will be able to track the shipments without leaving MR9. You can also designate other sending methods, such as courier or email, and track when you sent those orders out too. And if your billing department does not invoice an order until it has shipped, change a part's status from Turned In to Shipped here and they will receive an automatic alert.

1. Create new shipment

1. To initiate a shipment in:

   - **Turn In**

     Click **Shipping** at the top of the Edit Turn In – [#] window. See Generating invoices.

   - **Shipping**

     Find a part for which you want to send another shipment. See Searching shipping.

2. In the Shipping window's results grid, click **> New Shipment** next to the **Order.Part No.** number.

3. In the New Shipment window, basic order and invoice information appears at the top. Click next to any field to view and edit details, if desired. See Updating parts, Updating firms, and Updating contacts.

4. In the **Include** pane, service items that were billed on the invoice are listed by record. Check the box(es) for the record(s) whose service item(s) you are shipping.

2. Set details

In the **Shipping** pane, select the recipient and shipping method and enter details.

- **Send To**

  Select the recipient:

  - **Bill To** – Client listed in the **Bill To Firm/Bill To Contact** as paying for the order.
  - **Sold To** – Default. Client listed in the **Sold To Firm/Sold To Contact** as ordering the order.
  - **Other** – If you are sending the service items to someone else, select this option, then enter the contact name in the field that appears or if creating a FedEx/UPS label, leave blank and use contact lookup in the FedEx/UPS Shipping label panel (see next step).

3. ## Send shipment

- ### Delivery Method

  Select a method for sending the items. (Delivery Methods and default are set in Lists > Production.):

  - **If you selected FedEx or UPS,** click **Create Shipping Label.** See Shipping via FedEx and UPS.
  - **If you selected Email,** this is to establish an audit trail. Enter the date you sent the email in **Ship Date.**
  - **If you selected one of the other methods**, see Printing labels.

- ### Tracking No.

  If you created a FedEx or UPS label, MR9 fills in this number.

- ### Ship Date

  If you created a FedEx or UPS label, MR9 fills in this date. Otherwise, enter a date. (See Date Navigator)

- ### Estimated Shipping Cost

  This amount will be automatically generated when you create a FedEx or UPS shipping label (see Shipping via FedEx & UPS). Otherwise, you can enter an estimated amount for shipping the package, if desired.

- ### Remarks

  Enter details or other comments about the shipment.

4. ## Update part status

   If your billing department does not invoice a part until it has shipped, notify them by changing the order's status to Shipped:

   1. In the New Shipment window, click the **Status** field's ▽ **> Change Status to Shipped.**
   2. In the **Change Status** panel, select Shipped in ***Status to Be.** Enter any notes about the changed status in **Remarks,** and click **Save.**
   3. In the New Shipment window, click **Save.**

   ### NOTE: Change status later

   If you didn't change **Status** to Shipped in the New Shipment window, you can update an order's status later by:

- Finding the shipment in Shipping and changing the status in its Edit Shipment window. See Searching shipping.
- Updating the status in the order's detail window. See Changing order or part status.

Reference

- Turn In
- Sold To vs. Bill To
- Lists > Production
- Date Navigator

Step-by-step instructions

- Tracking shipments
- Generating invoices
- Searching shipping
- Updating parts
- Updating firms
- Updating contacts
- Shipping via FedEx and UPS
- Printing labels
- Changing order or part status

Using repositories

Store documents linked to an order, part, record, invoice, firm, contact, or location in their related repository. Search for files in a single repository or across all repositories. View file details, such as file type, size, who uploaded it, and — depending on the repository — who downloaded it via MR Connect. Update related information.

Download files for viewing, archiving, or emailing. Alert clients when files are uploaded. Delete files you no longer need to store. While you can only upload files to individual repositories, you can perform most other repository operations in either individual repositories or the central Repository.

- ## Uploading & granting access to files

  Upload related files within individual repositories. Upload multiple files at a time.

  Categorize files by file type to make searching easier and to have MR9 automatically attach relevant files to emails. If documents are "published," contacts can access them through MR Connect. Restrict which clients can access specific files. See Uploading files to a repository.

- ## Alerting clients to files

  If you have MR Connect, email clients to alert them when you have published their files online. See Alerting clients.

- ## Searching repositories

  Search for files in a single repository category or across all repositories at once — saving you time over searching for files in individual repositories within other functions. See information about searched files at a glance, bulk update file values, download, or delete files — all without leaving the main screen. See Searching repositories.

- ## Downloading & viewing files

  You must download a repository file to view it. You might also download files to archive elsewhere, or to email if you do not have MR Connect or recipients do not have web access. See Downloading & viewing files.

- ## Viewing file details

  To view MR9 information about a file, such as its download history, see Viewing & updating repository file details.

- ## Deleting files

  1. To remove files from the repository, check the box(es) of any file(s) you want to remove, then click:

     - in a **Repository** pane.
     - **Delete** in **Production > Repository.**

  2. In the popup that appears, click **Yes.**

- ## Update file qualifiers

  To classify repository files for proper user access and availability, such as which files contacts can access through MR Connect, see Updating file values quickly.

Reference

- MR Connect

Step-by-step instructions

- Uploading files to a repository
- Searching repositories
- Downloading & viewing files
- Viewing & updating repository file details
- Alerting clients
- Updating file values quickly

Post Invoices

Posting an invoice updates the related order's status to Billed and updates your MR9 ledger, so the invoice appears in your accounts receivable and financial reports.

Step-by-step instructions

- Searching unposted invoices
- Batch-posting invoices

COD Invoices

Cash on Delivery (COD) invoices require the Bill To Firm to pay the invoice when presented, typically along with the items listed on the invoice.

NOTE: COD invoices are not included in sales

MR9 does not regard COD invoices as sales, therefore they cannot be posted or archived to the central repository. CODs are handled differently than sales to avoid overstating revenue and to minimize the number of voids that would occur to clear uncollectible CODs from your accounts receivable.

Reference

- Bill To

Step-by-step instructions

- Working with COD invoices
- Purging COD invoices

Send Invoices

After posting invoices to your MR9 ledger, send clients copies of their invoices, either the current or original invoice, via email or traditional delivery methods, and/or archive the original in MR9's repository.

Step-by-step instructions

- Sending, resending, & archiving invoices

Transfer Invoice

It is a common error to send an invoice to a wrong party. Instead of voiding and re-billing, transfer the invoice from one party to another.

Step-by-step instructions

- Transferring invoices

Export Invoices

If you have clients that require electronic billing in a LEDES format, set up your LEDES preferences, and enter their codes on the order party or invoice level. Once you have invoices generated with proper UTBMS codes, you can export them, then email the text file to the client.

Reference

- Electronic billing
- LEDES format
- LEDES 1998B preferences
- UTBMS codes
- ABA Litigation Code Set

Step-by-step instructions

- Exporting invoices in LEDES format
- Entering electronic billing information
- Entering UTBMS codes for service items

Send Billing Forms

Similar to the Send Forms function in Orders, you can send forms related to invoices individually or in packages to the firms that ordered services.

Reference

- Send Forms

Step-by-step instructions

- Sending billing forms

Billing preferences

System-wide preferences and defaults for Billing functions.

- **Invoice**

  Options and content for emails that accompany invoices.

- **LEDES 1998B**

  Options for e-billing.

- **Reward Points**

  Options for awarding points to contacts who order orders from your company.

Reference

- Billing
- Electronic Billing
- Award Points

Step-by-step instructions

- Customizing global preferences

Searching unposted invoices

If you did not post invoices as you created them in Turn In, use the Post Invoices function in Billing to find the unposted invoices. You can then calculate invoice totals, if necessary, preview invoices to check for errors, and post and send invoices to clients.

1. **Billing > Post Invoices**
2. In the **Search By** pane, click to see all unposted invoices, or limit results by using one or more search filters before clicking :
   - **Order No.**

     Enter an order number to post invoice(s) for a single order.
   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to find invoice(s) for a single part of the order.
   - **Invoice Date From/Invoice Date To**

     Enter a date or date range to post invoices created during those days. See Date Navigator.
   - **Invoice No.**

     Enter the invoice number to post a single invoice.
   - **Created By**

     To find invoices generated by a single user, click . See Looking up users.
   - **Show COD**

     Default is No. COD invoices cannot be posted or archived to the central repository, so they do not appear in default search results. Slide to Yes if you have COD invoice(s) that you want to unflag as COD and post. (See Working with COD invoices.)
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs.
3. MR9 displays all unposted invoices that meet the search criteria in the results pane:
   - If a checkmark appears in **Need Calculation** column for an invoice, charges on the invoice have not been totaled and the invoice cannot be posted. To total charges, see Getting invoices ready to print.

- **To view/edit an invoice,** click its hyperlink. See Viewing & sending single invoices.
- **To review the invoice** before posting and sending, see Previewing invoices.
- **To post invoices,** see Batch-posting invoices.

NOTE: Color-coded results

Invoices listed in the Post Invoices results pane are color coded based on their ordered part's status. (Part status colors are set in System Preferences > Orders > Part Status Color.)

Reference

- Turn In
- Date Navigator
- COD invoices
- Lookup panel
- Business Units
- Part Status Color preferences

Step-by-step instructions

- Looking up users
- Working with COD invoices
- Getting invoices ready to print
- Viewing & sending single invoices
- Previewing invoices
- Batch-posting invoices

Working with COD invoices

Send COD invoices to clients via email, MR Connect, or traditional methods. And when you receive a payment for a COD invoice, remove the COD flag, post the invoice, and apply the payment.

1. Find invoice

1. **Billing > COD Invoices**

   ### TIP: Flag invoices as COD before posting

   Invoices for firms you have designated as COD in their profiles are automatically flagged as COD when generated in Turn In. (See Entering additional firm information.) You can change the COD status of any invoice in its **New Invoice/Edit Invoice** panel here or in Turn In or Post Invoices. (See Adding general billing information to invoices.)

2. In the **Search By** pane, click to see all outstanding COD invoices or use the search filters to restrict results before clicking :

   - **Invoice No.**

     Number of the invoice for which you received payment.

   - **Invoice Date From/Invoice Date To**

     Date or date range of COD invoices for which you received payment. Change date range, if desired, for example if you want to purge old COD invoices.

   - **Order No.**

     Order number related to the COD invoice.

   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to find COD invoice(s) for a single part of the order.

   - **Bill To Firm**

     Firm responsible for the COD invoice. See Looking up firms.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to COD invoices tied to specific BUs. See Lookup panel.

2. Send invoice to client

1. MR9 displays all invoices that meet the search criteria. To preview and send a COD invoice, click its:

   - **> View.**
   - Hyperlinked **Invoice No.**

2. In the View Invoice window, click **Preview Invoice.** If a popup appears saying the invoice needs to be calculated first, click **Yes.**

3. In the Preview Invoice window, check that the invoice is correct. (If the invoice is incorrect, click **Close.** Then in the View Invoice window, **Edit.** See Generating invoices or Finalizing invoices to update the invoice.)

   TIP: Does the invoice say COD?

   If the payment terms on the invoice do not say COD, "Cash on Delivery," or "Due upon receipt," look up the firm being billed and change its payment terms to COD. See Entering additional firm information.

4. When the invoice is correct and ready to give to the client, you have several options. To:

   - **View/hide line item charges**
     In the Preview Invoice window, click **Turn detail on** to display details or **Turn detail off** to remove details from the invoice.
   - **Email the invoice**
     In the Preview Invoice window, click **Send.** See Emailing from MR9.
   - **Publish the COD invoice on MR Connect**
     To allow the client to pay the invoice online, see Publishing COD invoices.
   - **Export/print the invoice**
     To send the invoice via traditional delivery methods or archive, see Printing invoices, statements, & reports.

5. When finished with the invoice preview, click **Close.** Then if in:

   - Preview Invoice window, click **Close.**
   - Edit Invoice window, click **Save > Save & Close.**

NOTE: COD invoice numbers end in asterisks

To easily differentiate a COD invoice from posted invoices, 3 asterisks (***) are added to the end of COD invoice numbers in the Preview Invoice window.

3. ## Remove COD status and post invoice

   When you receive payment for a COD invoice, change its status so you can post it and apply the payment:

   1. Find the invoice in the COD Invoices results grid and click its:
      - **> Edit.**
      - Hyperlinked **Invoice No.** Then in the View Invoice window, click **Edit.**
   2. In Edit Invoice window's **General** pane, slide **COD** to No.
   3. Click **Save > Save & Post.** MR9 removes the invoice from the COD Invoices list and posts it.
   4. To apply the payment, see Entering payments.

TIP: Post COD invoices in Post Invoices function

You can also find COD invoices in the Post Invoices function by selecting Yes in the Post Invoices' search criteria **Show COD** slider. Then when you search, Post Invoices will list all invoices — both COD and regular invoices — that match your search criteria. You can preview the invoice, turn details on and off, print or export the invoice, and remove its COD status so you can post and archive the invoice. See Searching unposted invoices.

Reference

- MR Connect
- Turn In
- Post Invoices
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Entering additional firm information
- Adding general billing information to invoices
- Purging COD invoices
- Looking up firms
- Generating invoices
- Finalizing invoices
- Emailing from MR9
- Publishing COD invoices
- Printing invoices, statements, & reports
- Entering payments
- Searching unposted invoices

Sending, resending, & archiving invoices

Email posted invoices to ordering clients, print them out to mail, and/or archive the invoices in MR9's repository. Use the Send Invoices function if you want to email or print multiple invoices at once — or to archive invoices in your repository. Use either Send Invoices or Invoice Inquiry to email or print individual invoices.

When a client requests a copy of an invoice, you can either send them an exact replica of the original invoice or an invoice showing the current balance.

1. **Find invoices to send/archive in one of several ways:**

   - When posting invoices (either in Post Invoices or Turn In), click **Yes** in the popup. The Send Invoices window automatically opens with the posted invoice(s) selected in the results pane.
   - Click **Billing > Send Invoices** and search for posted invoices. See Searching for posted invoices.
   - Click **Inquiry > Invoice Inquiry** and search for posted invoices. See Searching for posted invoices.

2. **To send invoices:**

   - From **Billing > Send Invoices,** see Sending & archiving invoices in batches. You can send/resend one or more invoices at a time or archive them to your repository.
   - From **Inquiry > Invoice Inquiry,** see Viewing & sending single invoices. You can send/resend — but not archive — invoices one at a time.

   In addition to sending the invoices, MR9 logs them into the Email Log.

Reference

- Post Invoices
- Turn In
- Email Log

Step-by-step instructions

- Searching for posted invoices
- Sending & archiving invoices in batches
- Viewing & sending single invoices

Transferring invoices

Instead of voiding and re-billing an invoice that was sent to the wrong party, transfer the invoice to the correct party. You can change the firm and/or contact responsible for paying the bill and/or who ordered the services billed.

1. Find invoice to transfer

1. **Billing > Transfer Invoice**
2. In the **Search By** pane, enter the number of the posted invoice in **Invoice No.** and click . If you don't know the invoice number, use the other search filters to restrict results before clicking :
   - **Invoice Date From/Invoice Date To**

     Date order was billed. Enter a date or date range. See Date Navigator.
   - **Order No.**

     Enter the order number tied to the invoice.
   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to find invoice(s) for a single part of the order.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. MR9 lists all of the invoices that meet the specified search condition(s). Click:
   - **> Edit** of the invoice you want to transfer.
   - **> View** or the invoice's hyperlinked **Invoice No.** to view the invoice first. Then in the Transfer Invoice window, click **Edit** if you want to transfer the invoice.

2. Transfer the invoice

All client fields must be filled.

- **Contact(s) only**

  To change the ***Sold To Contact** or ***Bill To Contact** only:
  - Select a different contact in the relevant dropdown.
  - If the contact is not listed, click **> New Contact** to add the contact to the firm.

See Adding contacts to MR9.

- **Sold To Firm**

  To change the ordering party:

  1. Click ***Sold To Firm** **> Lookup Firm.** See Looking up firms.
  2. After selecting the new firm, a popup appears asking if you want to change the Bill To Firm to the same Sold To Firm selected. Click:
     - **Yes** – To update the **Bill To Firm** to the same firm.
     - **No** – To leave the **Bill To Firm** as is/change it later to a different firm.
  3. If you selected a new ***Sold To Firm**, select the responsible contact at the new firm in the ***Sold To Contact** dropdown *(required).* If contact is not listed, click ⊞ to add the contact to the firm. See Adding contacts to MR9.

- **Bill To Firm**

  To change the party responsible for paying the invoice:

  1. Click ***Bill To Firm** **> Lookup Firm** *(required).* See Looking up firms.
  2. Select the responsible contact at the new firm in the ***Bill To Contact** dropdown *(required)*. If contact is not listed, click ⊞ to add the contact to the firm. See Adding contacts to MR9.

3. Click **Save.**

Reference

- Date Navigator
- Lookup panel
- Business Units
- Sold To vs. Bill To

Step-by-step instructions

- Looking up firms
- Adding contacts to MR9

Exporting invoices in LEDES format

Once you have posted invoices generated with proper UTBMS codes, you can export them in LEDES format, then email the text file to the client.

1. Find the invoice(s)

1. **Billing > Export Invoices**
2. In the **Search By** pane, enter search criteria:
   - ***Bill To Firm**

     Required. Click to select the firm for whom you are exporting invoices. See Looking up firms.
   - **Date Type**

     Invoice Date – Default. Date order was billed.

     Post Date – Date invoices were posted.
   - ***Date From/*Date To**

     Required. Works with **Date Type.** Default is yesterday. Change date range, if desired, in Date Navigator.
   - **Order No.**

     Enter the entire order number.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . All invoices that meet the search criteria appear in the results pane.

2. Export & send invoice(s)

1. Check box at top of results pane to select all invoices, or check each invoice's box to limit selection.
2. Click **Export > LEDES 1998B.** If a popup appears detailing any necessary LEDES information is missing on a selected invoice, click **OK** and edit the invoice. See Entering electronic billing information.
3. MR9 saves the invoice to your device as a .txt file labeled LEDES1998B-[today's date], which you can then validate and email to your client from your device.

TIP: Enter Client ID at party level

Client ID is a required field for the LEDES 1998B format. Enter this number for each e-billing contact in their party listing in an order so invoices for related parts automatically include the ID. See Entering party billing information.

BEST PRACTICES: Validating exported files

Before sending the exported LEDES file to a client, it is a good idea to check that the electronic invoices contained in the file will successfully upload to the client's e-billing system, so payment will shortly follow. You can validate the exported files easily using validation online services or desktop applications.

Reference

- Electronic billing
- LEDES format
- UTBMS codes
- ABA Litigation Code Set
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Entering UTBMS codes for service items
- Looking up firms
- Entering electronic billing information
- Entering party billing information

Sending billing forms

Download or print forms related to invoices to send along with invoices and/or received records to the firms that ordered services.

1. Find invoice

1. **Billing > Send Billing Forms**
2. In the **Search By** pane, enter the number of the posted invoice in **Invoice No.** and click . If you don't know the invoice number, use the other search filters to restrict results before clicking :
   - **Invoice Date From/Invoice Date To**

     Date order was billed. Enter a date or date range. See Date Navigator.
   - **Order No.**

     Enter an order number tied to the invoice.
   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to find invoice(s) for a single part of the order.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. MR9 lists all of the invoices that meet the specified search condition(s). Check the box(es) of the invoice(s) you want to send related forms for.

2. Select form

1. In the **Form** panel, select the category of billing forms you want to send in the **Form Type** dropdown.
2. If needed, select the form subcategory in the **Form Group** dropdown.
3. Forms in the selected **Form Type/Form Group** dropdowns appear in the **Form Name** pane. Click the radio button of the form you want to send.

3. Send form

Click **Send >**

- **Download** – To save a copy of the selected form to your desktop.
- **Preview** – To review the form before sending. You can edit/export/print the form from the preview screen. See Editing form File options.
- **Print** – To print the selected form to send to the client with its related invoice/received records.

Reference

- Date Navigator
- Lookup panel
- Business Units
- Sold To vs. Bill To
- Form Templates

Step-by-step instructions

- Editing form File options

Invoice Inquiry

Search for posted invoices using a variety of criteria, such as invoice number, type, amount(s) and/or date(s). Find invoices for a particular order, part, claim number and/or client matter number. Limit your search to open or paid invoices. Get detailed information, including payment history, about the invoices. Export your results for other uses. Resend invoices to clients, view and update details.

Step-by-step instructions

- Searching for posted invoices

Client Activity

Search for a specific client’s invoices. You can search the client’s open invoices by order number to come up with a settlement amount for a particular case in seconds, no matter how long the case has been going on. Send copies of searched invoices to the client.

Step-by-step instructions

- Viewing client activity

Client Analysis

Get a snapshot of a client's billing activity. Find out what services a client is purchasing. Compare totals by period to track your most important customers. **Client Analysis** includes sales and court taxes as separate line items so amounts match Client Activity reports.

Reference

- Client Activity

Step-by-step instructions

- Summarizing client activity

Receivable Transaction Inquiry

Search payment histories by transaction type (such as payment, duplicate payment, or refund), check number, check date, invoice number, transaction date, posted date, payment details, firm billed, or payer. View detailed information about individual payments, including payment type (such as check, credit card, retainer, or online via MR Connect).

Reference

- Credit Memo
- Debit Memo
- Duplicate Payment
- Refund
- Void
- Write-off
- Retainer
- MR Connect

Step-by-step instructions

- Searching for payment histories

Anniversary Inquiry

In MR9 you can enter any event you want to remember for contacts, such as birthdays or wedding anniversaries. The system will automatically remind you when an important event is within a set number of days. Use this function to pull up a list of contacts with upcoming anniversaries so that you can generate envelopes and labels for cards and gifts.

Step-by-step instructions

- Keeping track of important client dates
- Remembering important client dates

Marketing Inquiry

Know where your business is coming from. Discover problems — such as inactive clients — to deal with proactively — such as sending them reminder cards. Also find amounts of commisions you paid to your sales reps for any time period.

TIP: Use this function to:

- Quickly find out who are your top firms and/or contacts in terms of orders scheduled and revenue generated.
- See which clients have scheduled orders recently.
- Find out which clients have stopped scheduling orders with you and which ones you haven't billed in a while.
- View lists of commissions paid to your sales reps.
- Review newly entered clients for typos and other errors.
- Export inquiry results to create reports.
- Print envelopes and labels from inquiry results for your targeted marketing efforts.

Reference

- Sales Rep

Step-by-step instructions

- Knowing your market
- Finding highest commissioned sales reps

Searching for posted invoices

Search posted invoices using a variety of criteria. View and update individual invoices. From search results, send original or current versions of invoices to clients.

1. Use search criteria

1. Search for invoices in either:
   - **Billing > Send Invoices**
   - **Inquiry > Invoice Inquiry**

   TIP: Invoice Inquiry has the most search filters & is customizable

   If you want to search by the Bill To Firm, use Send Invoices. Otherwise, Invoice Inquiry will usually be the best function for finding invoices when you don't have the invoice number because it has the most search filters.

   Also, Invoice Inquiry's results grid layout is customizable, so you can set it up to show results as you want to see them — such as the column order, which columns are visible and which the list is sorted by. See Customizing grids.

2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:
   - **Invoice No.**

     To find a single invoice by its MR9-generated invoice number, enter the full invoice number.
   - **Date Type**
     - **Invoice Date** – Default. Date a part of an order was billed.
     - **Part Order Date** – Date the part of the order was obtained.
     - **Post Date** – Date invoice was posted in MR9.
   - **Date From/Date To**

     Works with **Date Type.** Enter dates in the fields or click to select dates in the Date Navigator.
   - **Order No.**

     To find invoices for an order, enter the full order number.
   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to

find invoice(s) for a single part of the order.

- **Account Status**

  Invoice Inquiry only

  - **ALL** – Default. Displays both paid and unpaid invoices.
  - **Show Open Invoices Only** – To see only outstanding (unpaid) invoices.
  - **Show Paid Invoices Only** – To see only paid or otherwise settled invoices (such as Voided).

- **Bill To Firm**

  Send Invoices only

  Click to find invoices for a single firm that will be paying for the invoices.

- **Claim No.**

  Invoice Inquiry only

  To find an invoice by its claim number, enter the full claim number.

- **Client Matter No.**

  Invoice Inquiry only

  To find an invoice by its client matter number (a number designating the client combined with a number designating the case), enter the full client matter number.

- **Amount Type**

  Invoice Inquiry only

  - **Balance** – To find invoices by the outstanding amount of the original invoice minus any payments.
  - **Balance+** – To find invoices by the current balance including all fees added since the original invoice was issued, such as late charges and finance charges, and minus any payments already made.
  - **Invoice Amount** – Default. To find invoices with billed totals within a certain dollar amount range.

- **Amount From/Amount To**

  Invoice Inquiry only

  Works with **Amount Type.** Enter numerals only.

- **Ref. No. for Contact**

  Invoice Inquiry only

To find an invoice for a Bill To contact who gave you a reference number to use on the invoice, enter the number.

- **Invoice Type**

  Default is ALL. To limit which categories of invoices to search, click . See Lookup panel. (Invoice types are set in Lists > Invoice.)

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to orders tied to specific BUs. See Lookup panel.

2. View results

1. Click . MR9 lists all of the posted invoices that meet the specified search condition(s). Voided invoices appear in red.
2. To export and save the results, click (in Send Invoices) or (in Invoice Inquiry) and select an export file type. See Exporting & printing results.

TIP: Balance+ column in results grids shows balance of all related transactions

Both Send Invoices and Invoice Inquiry include an **Invoice Amount** column and a **Balance+** column. **Balance+** shows the current balance for the invoice including all fees added since the original invoice was issued, such as late charges and finance charges, and minus any payments already made. Invoice Inquiry includes a **Balance** column which displays the outstanding amount of the original invoice minus any payments.

NOTE: COD invoices & unposted invoices are not included in results

Because COD invoices are different from regular invoices and cannot be posted until paid, they are not included in Send Invoices or Invoice Inquiry searches. To find COD invoices, use **Billing > COD Invoices.** See Working with COD invoices.

To find unposted non-COD invoices, see Searching unposted invoices.

3. View & send invoices to clients

To:

- **View & send an individual invoice,** plus update some details, handle related files, view applied payments, and make notes click its hyperlinked **Invoice No.** See Viewing & sending single invoices.
- **Send multiple invoices** to ordering clients by their preferred method or archive the invoices to your repository, see Sending & archiving invoices in batches *(Send Invoices function only).*

Reference

- Date Navigator
- Lookup panel
- Lists > Invoice
- Business Units

Step-by-step instructions

- Sending, resending, & archiving invoices
- Customizing grids
- Exporting & printing results
- Working with COD invoices
- Searching unposted invoices
- Viewing & sending single invoices
- Sending & archiving invoices in batches

Viewing client activity

Use Client Activity to find invoices for a specific client. Restrict the results to only open invoices or restrict further by order number to get a settlement amount quickly. View invoice details. Send copies of the invoices to the client as a PDF file. Save client activity results.

1. Identify the firm

1. **Inquiry > Client Activity**
2. In the Client Activity window's **Search By** pane, choose a **Party Type:**
   - **Bill To** – Third party that pays invoices, such as an insurance company.
   - **Bill To Parent** – Multi-office company that the firm paying invoices is part of.
   - **Sold To** – Default. Firm that ordered the services and pays invoices unless a separate Bill To firm has been designated.
   - **Sold To Parent** – Multi-office company that the firm that ordered the services is part of.
3. After selecting the party type, click next to ***Firm** field *(required)* and choose the firm. See Looking up firms.

NOTE: Access a client's activity from Aged A/R

In Aged A/R, you can view the account activity of any client listed directly instead of having to enter search parameters in Client Activity. See Finding overdue invoices.

2. Restrict results

With the firm selected, use the additional search filters to narrow the results returned, if desired:

- **Contact**

  Default is ALL. To see an individual contact's invoices, select the contact from the dropdown.

- **Date Type**
  - **Invoice Date** – Default. Date a part of an order was billed.
  - **Part Order Date** – Date the part of the order was obtained.
  - **Post Date** – Date invoice was posted in MR9.

- **Date From/Date To**

  Works with **Date Type.** To view activity within a specific date range, enter date(s) in the field(s) or click each field's to select date(s) in Date Navigator.

- **Account Status**

  - **ALL** – Default.
  - **Show Open Invoices Only** – To see only outstanding (unpaid) invoices.
  - **Show Paid Invoices Only** – To see only paid or otherwise settled invoices (such as Voided).

- **Order No.**

  Enter the MR9 assigned number of the order.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

3. ## View invoices

   Click . MR9 lists all of the invoices that meet the specified search condition(s). To view an individual invoice's details, click its hyperlinked **Invoice No.** See Viewing & sending single invoices.

   ### NOTE: Save the results

   To export and save the results, click and select an export file type. See Exporting & printing results.

4. ## Send invoices to client

   - **To email current invoice(s):**

     1. Check the boxes of the hyperlinked **Invoice No.** of specific invoices that you want to send to the client.
     2. Click **Send Invoices.** See Emailing from MR9. MR9 will compile the invoices into a PDF file attachment to the email.

   - **To email original invoices or print current or original invoices,** click the hyperlinked invoice number of the invoice you want to send. See Viewing & sending single invoices.

   When you send invoices by email, MR9 records the type of invoice, who received it, and when it was sent in the invoice's Notes Log.

Reference

- Sold To vs. Bill To
- Parent Firm
- Aged A/R
- Date Navigator
- Business Units
- Results pane
- Notes Log

Step-by-step instructions

- Looking up firms
- Searching in MR9
- Finding overdue invoices
- Emailing from MR9
- Viewing & sending single invoices

Summarizing client activity

Summarize a client's billing activity. Find out what services a client is purchasing. Compare totals by period to track your most important customers. Client Analysis includes sales and court taxes as separate line items so amounts match Client Activity reports.

1. Identify the firm

1. **Inquiry > Client Analysis**
2. In the Client Analysis window's **Search By** pane, choose a **Party Type:**
   - **Bill To** – Third party that pays invoices, such as an insurance company.
   - **Bill To Parent** – Multi-office company that the firm paying invoices is part of.
   - **Sold To** – Default. Firm that ordered the services and pays invoices unless a separate Bill To firm has been designated.
   - **Sold To Parent** – Multi-office company that the firm that ordered the services is part of.
3. After selecting the party type, click next to ***Firm** field *(required)* and choose the firm. See Looking up firms.

2. Restrict results

With the firm selected, use the additional search filters to narrow the results returned, if desired:

- **Contact**

  Default is ALL. To see an individual contact's invoices, select the contact from the dropdown.

- **Date Type**
  - **Invoice Date** – Default. Date a part of an order was billed.
  - **Part Order Date** – Date the part of the order was obtained.
  - **Post Date** – Date invoice was posted in MR9.
- **Date From/Date To**

  Works with **Date Type.** To analyze activity within a specific date range, enter date(s) in the field(s) or click each field's to select date(s) in Date Navigator.

- **Account Status**
  - **ALL** – Default.
  - **Show Open Invoices Only** – To see only outstanding (unpaid) invoices.
  - **Show Paid Invoices Only** – To see only paid or otherwise settled invoices (such as Voided).
- **Order No.**

  Enter the MR9 assigned number of the order.
- **Show Quarterly**

  Default is No. MR9 will display billed amount totals by years and months (in expanded view). Slide to Yes to add quarterly totals to expanded view.
- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

3. View results

1. Click . MR9 displays a snapshot of billed services that meet the specified search condition(s), broken down into number of units sold, billed rush charges, and total billed amounts year-to-date and all-time totals.
2. To view details of:
   - **All results**

     Click **Expand/Collapse >**
     - **Expand Service:** Service Groups expand to display amounts by service item and subtotals for the Service Groups and Service Subgroups. Subtotal rows have bold headers and a gray background to differentiate them.
     - **Expand Date:** Yearly grouping(s) expand to display amounts by quarters (optionally) and months.
   - **Single Service Group**

     Click next to the Service Group. MR9 displays the Service Subgroup(s) amounts and the Service Group's subtotals. Click next to a Service Subgroup to see the breakdown by service item and the Service Subgroup's subtotals. Subtotal rows have bold headers and a gray background to differentiate them.

Single year by month and quarter (optionally)

- Click ⊕ next to date headers. If you selected Show Quarterly in your search criteria, MR9 will display the year broken down into quarters first. Click ⊕ next to a quarter to see monthly totals.
- See Using interactive reports for more information.

4. **Export/print results**

   To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Client Activity
- Sold To vs. Bill To
- Parent Firm
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up firms
- Using interactive reports
- Exporting & printing results

Searching for payment histories

Use Receivable Transaction Inquiry to search payment histories and view detailed information about individual payments and other types of transactions, such as credit and debit memos, refunds, voids, and write-offs. Fix errors in posted transactions. Customize the results grid to show information in the order that works best for you, including grouping transactions by additional/different criteria.

1. Use search criteria

1. **Inquiry > Receivable Transaction Inquiry**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:

   - **Transaction Type**

     Default is ALL. To narrow the results to specific types of payments and/or other receivables, click and select transaction type(s) in the **Lookup Transaction Type** panel. See Lookup panel.

   - **Check No.**

     If payment was by check, enter the check number to search for a single payment.

   - **Date Type**

     - **Check Date** – The date on the check.
     - **Post Date** – Default. The date you posted the transaction.
     - **Transaction Date** – The date you entered the payment into MR9.

   - **Date From/Date To**

     Works with **Date Type.** To view transaction history within a specific date range, enter date(s) in the field(s) or click each field's to select date(s) in Date Navigator.

   - **Invoice No.**

     Enter an invoice number to search for transactions applicable to a single invoice.

   - **Payer**

     To find payments made by a single firm, click . See Looking up firms.

   - **Made By/Description**

     To find transactions that include specific information entered in the **Made By** field

of the Payment window, enter part of the text here. (See Entering simple payments (one check per invoice).)

- **Bill To Firm**

  To find payments by a firm that was invoiced for an order, click . See Looking up firms.

3. Click . MR9 lists all of the transactions that meet the specified search condition(s).

TIP: Access a client's payment history from Aged A/R

In Aged A/R, you can view the 90-day payment history of any client listed directly instead of having to enter search parameters in Receivable Transaction Inquiry. See Finding overdue invoices.

NOTE: Save the results

To export and save the results, click and select an export file type. See Exporting & printing results.

2. View/update payments

In the list of transactions, to:

- **View/update the transaction's details,** click a hyperlinked **Amount.** In the View Payment window, transaction details appear including the invoice(s) the transaction was applied to and a breakdown of how it was applied to the invoice(s) listed. Click **Edit** to update the check number, date, and who issued the check. (See Entering simple payments (one check per invoice).)
- **View/update the invoice's details,** click a hyperlinked **Invoice No.** See Viewing & sending single invoices.

Reference

- Credit Memo
- Debit Memo
- Duplicate Payment
- Refund
- Miscellanous Receipt
- Void
- Write-off
- Lookup panel
- Date Navigator
- Aged A/R

Step-by-step instructions

- Searching in MR9
- Looking up firms
- Entering simple payments (one check per invoice)
- Finding overdue invoices
- Updating firms
- Updating contacts
- Viewing & sending single invoices
- Exporting & printing results

Keeping track of important client dates

Enter any event you want to remember for contacts — such as birthdays or wedding anniversaries — in their MR9 listing (see Remembering important client dates). The system will automatically remind you when an important event is within a set number of days. In Anniversary Inquiry, you can pull up a list of contacts with upcoming events so that you can print envelopes and labels for cards and gifts to send to them in celebration.

1. Use search criteria

1. **Inquiry > Anniversary Inquiry**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:

   - **Anniversary Type**

     Default is ALL. To restrict the search to a specific kind of event, click . See Lookup Panel. (Anniversary types are set in Lists > Others.)

   - **Anniversary Date From/Anniversary Date To**

     Default is next month. To view anniversaries within a different date range, change the date range by selecting months and days in the dropdowns.

   - **Client Rep**

     To restrict anniversaries shown to only those of clients who are represented by a particular user who oversees orders on behalf of the client, click . See Looking up users.

   - **Sales Rep**

     To restrict anniversaries shown to only those of clients who are assigned to a particular account executive/sales representative, click . See Looking up users.

   - **Firm**

     To restrict anniversaries shown to only those of contacts in a single firm, click . See Looking up firms.

   - **Send To**

     - **Firm Address** – To have company addresses printed on the labels.
     - **Home Address** – To have contacts' home addresses printed on the labels.

   - **Show Active Only**

     Default is Yes. Leave as the default if you only want to see contacts that you have

designated as Active (see Entering general contact information). If you want to see all contacts, slide to No.

2. View results

Click . MR9 lists all of the contacts that meet the specified search condition(s). Click a hyperlinked contact to view or edit details (see Updating contacts).

NOTE: Save the results

To export and save the results, click and select an export file type. See Exporting & printing results.

3. Print envelopes or labels

1. Check the box(es) of the hyperlinked **Contact** of specific client(s) that you want to send mail to.
2. Click **Print Labels.** See Printing envelopes and labels.

Reference

- Lookup Panel
- Lists > Others
- Client Rep
- Sales Rep
- Lookup panel
- Results pane

Step-by-step instructions

- Remembering important client dates
- Looking up users
- Looking up firms
- Exporting & printing results
- Updating contacts
- Printing envelopes and labels

Knowing your market

You wouldn't have a business if you didn't have clients, so knowing who they are can help you better market your services to them. Evaluate clients on a firm level or by contact in terms of orders scheduled and revenue generated. View individual clients' details. Print envelopes and labels from inquiry results. Export results to save and create your own reports.

To find clients:

- Added during a particular time period, see Finding new clients.
- With no orders placed during a particular time period, see Know who has stopped calling.
- With the most orders placed during a particular time period, see Finding most active clients.
- With no billed orders during a particular time period, see Finding non-invoiced clients.
- With the highest billed amounts during a particular time period, see Finding highest-invoiced clients.

TIP: Qualify clients by how many orders they generate

In addition to the search options in Marketing Inquiry, use Order Analysis to easily see who your best clients are by looking at the net number of settings they generate. Total invoice amounts can be misleading: A lot of work is billed to third parties — such as insurance companies whom you don't market to — and a lot of a law firm's invoices might be copy orders on orders they didn't initiate. Order Analysis can give you a snapshot to quickly see who your best clients are.

NOTE: Monitor commissions

You can also use Marketing Inquiry to find commission amounts paid to your sales reps. See Finding highest commissioned sales reps.

Reference

- Order Analysis

Step-by-step instructions

- Finding new clients
- Know who has stopped calling
- Finding most active clients
- Finding non-invoiced clients
- Finding highest-invoiced clients
- Finding highest commissioned sales reps

Finding highest commissioned sales reps

Find sales representatives that had the highest commissions during a particular time period. Print envelopes and labels. Export results to save and create reports.

1. Select user type

1. **Inquiry > Marketing Inquiry**
2. Select Users in **Category** dropdown.
3. Leave **Type** as default Top N Sales Rep Commission.

2. Update required information

***Invoice Post Date From/*Invoice Post Date To** *(required)* default is current month to date. To view sales reps within a different time period, change the date range in Date Navigator.

3. Restrict results

Use additional search filters to narrow the results returned, if desired:

- **Top N**
  Default is 100 sales reps. To search for a different amount, update the number in this field.
- **Exclude Copies**
  Default is No. If you don't want to include commissions on copies in your search results, slide to Yes.
- **Business Units**
  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to orders tied to specific BUs. See Lookup panel.

4. Print envelopes/labels

Click . All sales reps that meet the search criteria appear in the results pane.

- **To print envelopes/labels:**
  1. Check the the box(es) of individual(s) to select them.
  2. Click **Print Envelopes and Labels.** See Printing envelopes and labels.

NOTE: Save the results

To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Sales Rep
- Date Navigator
- Lookup panel
- Business Units
- Results pane

Step-by-step instructions

- Managing notification emails
- Printing envelopes and labels
- Exporting & printing results

Receive Payments

When you receive payment for outstanding invoices or have a retainer (upfront deposit) to use, you can apply the funds to a single invoice or multiple invoices and post the transaction.

Reference

- Retainer

Step-by-step instructions

- Entering payments
- Applying retainers
- Balancing transactions to post

Enter Other Transactions

Payments are not the only financial transactions that affect invoices. Enter non-cash transactions — such as credit and debit memos, duplicate payments, refunds, miscellaneous income, voids, and write-offs — into MR9 to keep your MR9 ledger accurate.

Reference

- Credit Memo
- Debit Memo
- Duplicate Payment
- Refund
- Miscellanous Receipt
- Void
- Write-off

Step-by-step instructions

- Viewing & posting other transactions
- Issuing credit memos
- Issuing debit memos
- Entering duplicate payments
- Recording refunds made
- Entering miscellaneous receipts
- Voiding invoices
- Writing off uncollectible invoices

Send Payment Receipts

After posting payments for outstanding invoices, send payment receipts to the Bill To or Sold To clients.

Step-by-step instructions

- Posting payments
- Sending receipts for payments

Daily Register

MR9 provides three types of daily registers: sales, cash receipts-payment, and cash receipts-other. The last page of each register lists its grand totals.

1. The **Sales Register** lists all invoices posted for the specified period, grouped and subtotaled by business unit. It shows you how much revenue you generated.

   Each business unit has its own page(s), and in addition to listing the business unit's total billed amount at the end of its invoices, it lists the number of order parts and invoices included in that amount.

2. The **Cash Receipts Register-Payment** lists all payments posted for the specified period, grouped and subtotaled by business unit. It shows you how much money you received.

   Each payment lists its total amount and breaks down how it was applied to the invoice balance (credit), discount, overpayment, late charge (one-time account service fee assessed on past-due invoices), finance charge (monthly service fee assessed on past-due invoices), (credit card) processing fee, surcharge, and net cash.

   Each business unit has its own page(s), and in addition to listing the business unit's totals at the end of its transactions, it lists the total amounts for invoices over 90 days old.

3. The **Cash Receipts Register-Other** lists credit memos, debit memos, duplicate payments, refunds, miscellaneous receipts, voids, and write-offs posted for the specified period, grouped and subtotaled by business unit. It shows you amounts for all transaction types that are not payments.

   Each business unit has its own page(s), and includes the total amount for each transaction type.

Reference

- Business Unit
- Discount
- Overpayment
- Credit Memo
- Debit Memo
- Duplicate Payment
- Refund

- Miscellanous Receipt
- Void
- Write-off

Step-by-step instructions

- Printing daily registers

Daily Balance Log

Use Daily Balance Log for an instant snapshot of this month's accounts receivable — and also to see accounts receivable balances for any date.

Reference

- Accounts Receivable

Step-by-step instructions

- Keeping track of accounts receivable balances

Finance Charges

MR9 can automatically generate finance charges (monthly service fee assessed on past-due invoices) for overdue invoices. You can also manually generate finance charges, zero them out if clients paid invoices' current balance but not the finance charges, and export/print copies of finance charges reports.

Reference

- Firms

Step-by-step instructions

- Entering additional firm information
- Generating finance charges
- Clearing finance charges
- Printing finance charges reports

Monthly Journals

Monthly journal reports are summary recaps of daily registers, breaking down every sale and cash receipt posted during the selected month into debits and credits. Your accountant uses these journals to prepare your company's financials.

- The **Sales Journal** lists all daily credit sales totals for the specified period, grouped and subtotaled by business unit. It shows you how much you billed.

  Each business unit has its own page(s), and in addition to listing the business unit's sales as debits in Accounts Receivable and credits in Revenue at the end, it lists the number of orders and invoices included in that amount.

- The **Cash Receipts Journal** lists all daily cash inflows for the specified period, grouped and subtotaled by business unit. It shows you how much money you received.

  Each business unit has its own page(s), and includes the total amount for each applicable account per business unit, crediting sales and debiting cash and other transactions.

Reference

- Daily Register
- Accounting Basics
- Debits and credits
- Business Unit

Step-by-step instructions

- Printing monthly journals

Aged A/R

Aged A/R (Accounts Receivable) reports tell you which clients have unpaid invoices, how much they are in arrears, and for how long. In this interactive report, you can also drill down to see details about the client, the outstanding invoices, and your collection efforts to date. You can even resend invoices without leaving the function.

Reference

- Collections

Step-by-step instructions

- Finding overdue invoices

Send Statements

Monthly statements summarize each client's overdue invoices. Print or email statements and/or unpaid invoices. Invoices show payments, credits, finance charges, debits, and current balance.

NOTE: Send invoices to individuals or "Accounts Payable"

Attorneys receive separate statements unless their firm is flagged to consolidate statements. Consolidated statements are sent to the contacts' firm.

Reference

- Consolidated Invoices and Statements

Step-by-step instructions

- Sending monthly statements
- Entering additional firm information

Client Account Activity

This report lists each client's monthly activities, grouped by business unit, plus a grand total outstanding balance. Monthly activities include invoices, payments, credit memos, debit memos, duplicate payments, refunds, voids, and write-offs.

Reference

- Business Unit
- Credit Memo
- Debit Memo
- Duplicate Payment
- Refund
- Void
- Write-off

Step-by-step instructions

- Printing client account activity reports

Paid Invoices

View all invoices paid within a specific period and their details.

Step-by-step instructions

- Viewing paid invoices

Voided Invoices

View all invoices voided within a specific period and their details.

Reference

- Void

Step-by-step instructions

- Viewing voided invoices
- Voiding invoices

Collection Letters

Use MR9's collection tools to make your collection efforts more productive. Use Aged A/R to find clients who owe you the most money for the longest period of time. Then contact the clients — including sending collection letters with all of their details automatically filled in by MR9 — and follow up until you are paid.

Reference

- Collections
- Aged A/R

Step-by-step instructions

- Finding overdue invoices
- Sending collection letters

Collection Follow-up

Keep your collection efforts on track by contacting overdue clients as scheduled, tracking responses and promises, and setting reminders.

Reference

- Collections

Step-by-step instructions

- Following up on collection promises

Collection Forecast

Forecast future income from collections based on promised payment dates (and amounts) of outstanding invoices.

Reference

- Collections

Step-by-step instructions

- Forecasting cash flow from collections

Accounts Receivable

Accounts receivable, referred to as **receivables** in MR9, are amounts owed to your company from clients due to sales of goods and services.

Step-by-step instructions

- Entering payments
- Keeping track of accounts receivable balances

Receivables preferences

System-wide preferences and defaults for Receivables functions.

- **Payment Receipts**

  Set default subject line for MR9 payment receipts.

- **Statement**

  Options for printing and emailing statements.

Reference

- Receivables
- Send Payment Receipts
- Send Statements

Step-by-step instructions

- Customizing global preferences

Monthly reports at a glance

MR9 provides a wide variety of preset reports designed to give you quick and easy access to your company's information. The tables in this section group the preset MR9 reports into business-related areas.

Collection-related reports

Report	Location	Description
Send Statements	Receivables	Summarizes each client's overdue invoices. Can include copies of the invoices, showing payments, credits, finance charges and current balance. Each attorney receives a separate statement unless the firm has been set up to consolidate.
Aged A/R	Receivables	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.
Collection Forecast	Receivables	Projects changes in your cash flow based on the promised payment dates (and amounts) of outstanding invoices.

Financial reports

Report	Location	Description
Monthly Journals	Receivables	A summary recap of daily registers. Your accountant uses this report to prepare your company's financials.
Paid Invoices	Receivables	Lists all invoices paid within the specified period, grouped and sorted by the payment date.
Voided Invoices	Receivables	Lists all invoices voided within the specified period, grouped and sorted by the void date.
Business Analysis	Reports	Provides an instant snapshot of your business, with the amount of units sold, amounts billed, and amounts voided shown for all service items in different periods for comparison.
Misc. Sales	Reports	Summarizes each invoice (containing the specified service items), grouped and subtotaled by client.
Insurance Billing	Reports	Lists all invoices billed directly to an insurance company (or other third party), grouped and subtotaled by client and insurance company.

Client-related reports

Report	Location	Description
Client Account Activity	Receivables	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	Reports	Shows all invoices (starting with O&1), grouped and subtotaled by client. Sorting this report by amount can generate a holiday gift list.
Activity Log	Connect	Shows who is using your MR Connect and how often they access it.

Tax-related report

Report	Location	Description
Sales Tax	Payables	Lists all invoices that include a sales tax amount, generated for the specified period.

Entering payments

Enter a payment and apply it to outstanding invoices in one function, whether the check is for a single invoice or multiple invoices. MR9 can handle an unlimited number of invoices paid by one check.

1. **Receivables > Receive Payments**
2. Click **New >**
   - **One Check One Invoice** – If you received a check or other payment for a single invoice. See Entering simple payments (one check per invoice).
   - **One Check Multiple Invoices** – If you received a check or other payment that is for more than one invoice. See Entering payment covering multiple invoices.

NOTE: Payments through MR Connect just need to be posted

If clients pay online through MR Connect, you do not have to enter payment information manually. MR9 automatically enters the payment, including the processing fee if you have set up processing fees in MR9. (See Selecting BU financial accounts.) Online payments will appear in the Receive Payments results grid, so you can review, edit, and post the payment. See Posting payments.

Reference

- MR Connect
- Processing Fee

Step-by-step instructions

- Entering simple payments (one check per invoice)
- Entering payment covering multiple invoices
- Selecting BU financial accounts
- Posting payments

Applying retainers

After you perform work for which you're holding a retainer, generate invoices for the client first. Then apply payments to those invoices using the retainer. If any money is left over, it remains in the client's retainer account until you issue a refund check to the client. (See Recording refunds made.)

Continued from Entering simple payments (one check per invoice) or Entering payment covering multiple invoices.

1. Enter retainer details

1. In the New Payment window's **Payment** pane, select Retainer in the **Payment Type** dropdown.
2. ***Transaction Date** *(required)* defaults to today. Change date, if desired, in Date Navigator.
3. If ***Payer** is blank or incorrect, click or to select the Bill To firm. See Looking up firms.
4. The **Retainer Amount** field appears with the current balance of the client's retainer. In the ***Amount** field *(required)*, enter the amount of the retainer you plan to use now (up to its current balance).
5. Click **Save.** The **Apply Invoices** panel opens automatically.

2. Apply to invoices

See Applying payments to invoices.

3. Post payment

See Posting payments.

Reference

- Retainer
- Date Navigator

Step-by-step instructions

- Entering payments
- Entering simple payments (one check per invoice)
- Entering payment covering multiple invoices
- Entering retainers

- Generating invoices
- Recording refunds made
- Looking up firms
- Applying payments to invoices
- Posting payments
- Balancing transactions to post

Viewing & posting other transactions

Enter Other Transactions does not have search filters. All unposted transactions appear in the main grid by default. In the main grid you can view basic details of the transaction including who entered it into the system and when. From the main grid you can view more details of any listed transaction, edit some transaction details, delete transactions.

You can also enter new credit memos, debit memos, duplicate payments, refunds, miscellaneous receipts, voids, and write-offs.

After reviewing transactions, you post them. All daily transactions (such as invoices, payments, credit memos, etc.) are temporary until they are posted (i.e., closed out). Once posted, they cannot be modified nor deleted. The daily registers and monthly journals use the post date (not the transaction date) to select and group transactions on the report.

1. **Receivables > Enter Other Transactions**

2. In Enter Other Transactions window, all unposted transactions appear in the main grid. To:

   - **View an unposted transaction**
     Click its **> View.** Or click its hyperlinked **Transaction Amount.**

   - **Edit an unposted transaction**
     Click its **> Edit.** Or click its hyperlinked **Transaction Amount,** then click **Edit** in its View window. See the instructions below for entering new transactions of the type you are editing.

   - **Delete an unposted transaction**
     Click its **> Delete.** Or click its hyperlinked **Transaction Amount,** then click **Delete** in its View window. Click **Yes** in the popup that appears.

   - **Enter a new transaction**
     Click **New >**

     - **Credit Memo** (see Issuing credit memos)
     - **Debit Memo** (see Issuing debit memos)
     - **Duplicate Payment** (see Entering duplicate payments)
     - **Refund** (see Recording refunds made)
     - **Miscellaneous Receipt** (see Entering miscellaneous receipts)
     - **Void** (see Voiding invoices)
     - **Write-off** (see Writing off uncollectible invoices)

3. When ready to post transactions, check the box(es) of unposted transaction(s) to select them.
4. Click **Post** to post the transaction(s).
5. MR9 posts the transaction(s). When finished, click **OK** in the popup that appears.

NOTE: You can manually refresh the list

MR9 updates the list of unposted transactions automatically as you update, delete, and post transactions. You can also refresh the list to include all systemwide changes that occured while you were in the function by clicking **Refresh.**

Reference

- Daily Register
- Monthly Journals
- Credit Memo
- Debit Memo
- Duplicate Payment
- Refund
- Miscellanous Receipt
- Void
- Write-off

Step-by-step instructions

- Issuing credit memos
- Issuing debit memos
- Entering duplicate payments
- Recording refunds made
- Entering miscellaneous receipts
- Voiding invoices
- Writing off uncollectible invoices

Sending receipts for payments

After posting payments, send clients receipts acknowledging the payments.

1. **Receivables > Send Payment Receipts**
2. ***Post Date** defaults to today and **Send To** defaults to Bill To. Click or use the search filters to restrict results before clicking :
   - ***Post Date**

     To enter a different date, see Date Navigator.
   - **Send To**

     Bill To – Default. Firm responsible for the invoice.

     Sold To – The firm that ordered the services invoiced.
   - **Created By**

     To find payments by the MR9 user who entered the payments, click . See Looking up users.
3. All posted payments that meet your search criteria are listed. To:
   - **View which invoice(s) a payment has been applied to,** click . Any invoices paid with the payment are listed below the payment.
   - **Export/print the list as a report,** click and select an export file type. See Exporting & printing results.
4. Check the box(es) of payment(s) you want to acknowledge, then click **Send.** See Emailing from MR9. After sending the email(s), MR9 notes the result in the **Results** column of the Send Payment Receipts grid, and records the email(s) in Tools > Email Log.

Reference

- Date Navigator
- Lookup panel
- Email Log
- Results pane

Step-by-step instructions

- Looking up users
- Posting payments
- Exporting & printing results
- Emailing from MR9
- Viewing email logs

Printing daily registers

Run the 3 daily registers reports — sales, cash receipts-payment and cash receipts-other — after posting for set time periods, such as daily or weekly, depending on how often you post. Or run the report to see everything in your system that has not been posted yet.

1. **Receivables > Daily Register**
2. In the **Search By** pane, make selections as needed:
   - **Posted**

     Default is Yes. Generally, you run daily registers at the end of the day after posting. Slide to No if you want to see all transactions that haven't been posted yet.
   - ***Post Date From/*Post Date To**

     Required, posted transactions only. Default is today. Change the range, if desired. Range is limited to one month. See Date Navigator.
   - **Invoice Type**

     Default is ALL. To limit which categories of invoices to search, click . See Lookup panel. (Invoice Types are set in Lists > Invoice.)
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all of the entries that meet the specified search condition(s) as three separate reports, which each group their entries under one BU per page, plus a Grand Total page. Each report is shown as a tab above the report pane. The search criteria used to generate the reports appear at the bottom of each page of the reports above the timestamp.

   Export a report to save it and/or edit it in another application, or print it. See Printing invoices, statements, & reports.

Reference

- Date Navigator
- Lookup panel
- Lists > Invoice
- Business Units

Step-by-step instructions

- Printing invoices, statements, & reports

Keeping track of accounts receivable balances

Get an instant snapshot of accounts receivable, or reestablish a starting balance as of a certain date by using this audit function.

1. **Receivables > Daily Balance Log**
2. In the **Search By** pane, make selections as needed:
   - ***Date From**

     Default is beginning of current month. Change the date, if desired. See Date Navigator.

     Date To

     Default is today and cannot be changed.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all of the dates transactions were entered within the date range you specified in descending order. **(Begin Balance** + **Increase A/R** – **Decrease A/R** = **End Balance).**
4. Click a date to see details. In the View Balance Log window, the selected day's transactions are broken out and grouped according to type, such as invoice, payment, credit memo, debit memo, or void.
5. To export and save results of either the Daily Balance Log main grid or the individual Balance Log window, click below its grid and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Exporting & printing results

Generating finance charges

To assess finance charges for overdue invoices, set up finance charge rates in clients' firm records first. (See Entering additional firm information.) You can have MR9 automatically generate a finance charge for each invoice that is more than 30 days old or you can manually generate finance charges for any invoice.

1. **Receivables > Finance Charges**
2. Click **Generate >**
   - **Auto** – To have MR9 generate finance charges for invoices more than 30 days old if it has been more than 28 days since you performed this task last. See Generating finance charges automatically.
   - **Manual** – To generate finance charges for individual invoices yourself. See Generating finance charges manually.

Reference

- Firms

Step-by-step instructions

- Entering additional firm information
- Generating finance charges automatically
- Generating finance charges manually
- Clearing finance charges
- Printing finance charges reports

Printing monthly journals

Print or email monthly journal reports for your accountant to use in preparing your company's financials.

1. **Receivables > Monthly Journals**
2. In the **Search By** pane, leave as defaults or make selections:
   - ***Month**

     Required. Defaults to the current month.
   - **Revenue Account From**
     - **Business Unit –** Default. Sales Journal groups relevant financial activity into A/R and Revenue.
     - **Service Item** – To see the amounts in the Sales Journal grouped based on service items billed.
   - **Show Detail**

     Default is Yes. MR9 will show posted subtotals in addition to account totals. Slide to No to see account totals only.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to transactions tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all of the transactions that meet the specified search condition(s) as two separate reports, which each group their entries under one BU per page, plus a Grand Total page. Each report is shown as a tab above the report pane.
4. Export a report to save, share, and/or edit in another application, or print. See Printing invoices, statements, & reports.

Reference

- Accounting Basics
- Lookup panel
- Business Units

Step-by-step instructions

- Printing invoices, statements, & reports

Finding overdue invoices

The first step in collections is finding which invoices are overdue. View overdue invoices in ascending or descending order grouped by when the invoices were due (aging period), grand total owed, firm name or number, assigned collector, or COD status. Find details about the clients, their invoices, and your collection efforts. Contact clients with all of the relevant information at hand. Resend invoices. Export the list as a report to an *Excel* spreadsheet or generic file to save, use in other applications, and print.

1. Search for overdue invoices

1. **Receivables > Aged A/R**
2. In the **Search By** pane, click to see all currently overdue invoices or use the search filters to refine the results before clicking :

   - ***Age as of**

     Required. Default is today. Enter a different date to create Aged A/R report for an earlier date. See Date Navigator.

   - **Number of period**

     How many months into the past to present outstanding invoices. Default is 6 but you can select any number up to 12. Results will include an extra column for all amounts billed on dates not included in the time periods requested, plus a grand total column.

   - **Group By**

     Bill To – Default. Who is responsible for paying the invoices.

     Sold To – Who ordered the billable services.

   - **Firm**

     Leave blank unless you want to see outstanding invoices for a single firm. See Looking up firms.

   - **Parent Firm**

     Leave blank unless you want to see outstanding invoices for all of the offices under a specific parent firm. See Looking up firms.

   - **Consolidate by Parent Firm**

     Default is No, so every firm with outstanding invoices that fit your search parameters will be listed separately. Slide to Yes if you want to combine all outstanding invoice amounts of firms that are part of a multi-office firm together into one row.

- **Collector**

  Leave blank unless you want to see outstanding invoices a single user is responsible for collecting, i.e., you only want to see your clients with outstanding invoices. If you want to view a single collector's workload, click . See Looking up users.

- **Invoice Type**

  Categories for organizing invoices by source, purpose, function, etc. Default is ALL. Click to restrict search to certain types of invoices. See Lookup panel. (Invoice Types are set in Lists > Invoice.)

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

2. ## View details & contact clients

   MR9 lists all of your clients that have outstanding invoices that meet your search criteria. To:

   - **View a client's recent payment history**

     Click **> 90-day payment history** next to the hyperlinked firm name. The Receivable Transaction Inquiry window lists all of the client's payment activity for the past 90 days. To filter the results, see Searching for payment histories. Review this information to help you prepare for contacting the client about their recent payments and invoices the payments were applied to.

   - **View a client's financial history**

     Click **> Client Activity** next to the hyperlinked firm name. The Client Activity window lists all of the client's financial activity with your company. To filter the results, see Viewing client activity. Review this information to help you prepare for contacting the client about their payments and outstanding amounts due.

   - **Send collection letters**

     Click **> Collection Letters** next to the hyperlinked firm name. The Collection Letters window lists all of the Bill To invoices for the client. To send letters, see Sending collection letters.

   - **View previous collection efforts & enter new ones**

     Click a hyperlinked firm name. In the View Firm window, click **Edit.** See Recording collections efforts.

   - **View COD invoices**

     Click the **COD** header in the Aged A/R results pane 2x to have all COD invoices

appear at the top of the list.

- **View/resend invoices tied to the firm within a specific time frame**
  Click the firm's hyperlinked amount in the desired time frame column. In the View Aged A/R window, you can:

  - **See the client's basic contact information,** such as the firm's main phone number.
  - **Look up additional information about the firm** by clicking next to the **Firm** field.
  - **View basic invoice information at a glance,** including how old in days any listed invoice is, in the **Invoices for period [date range]** pane.
  - **View an invoice's details** by clicking its hyperlinked invoice number in the **Invoices for period [date range]** pane. See Viewing & sending single invoices.
  - **Resend invoices** by checking their boxes in the **Invoices for period [date range]** pane, then clicking **Send Invoices.** See Composing emails.

3. Export/print report

If you'd like to work from a hard copy of the Aged A/R report, you have 2 options:

- **Export the report with invoice details included.** Click **Export with Invoices.** MR9 will export the report as an *Excel* spreadsheet with each client's overdue amounts broken down by age, plus a list of all of their overdue invoices including basic details. Total amount line at the bottom of the report includes total outstanding amounts for all clients broken out by time period.
- **Export the Aged A/R report without invoices.** Click and select an export file type. See Exporting & printing results.

TIP: Use Aged A/R to set collection priorities

The default Aged A/R lists clients with unpaid balances in descending order by the ones who have the largest amount outstanding in the oldest time period. These are the clients you want to go after first for the biggest results.

NEXT: Contact overdue clients

When you access client details from the Aged A/R, you can use all of this information to contact the client and provide them with details about overdue amounts from specific invoices. Then record your efforts and set follow-up reminders. See Recording collections efforts.

Reference

- Collections
- COD Invoices

- Microsoft Excel
- Date Navigator
- Parent Firm
- Sold To vs. Bill To
- Lookup panel
- Business Units
- Lists > Invoice

Step-by-step instructions

- Looking up firms
- Looking up users
- Searching for payment histories
- Viewing client activity
- Sending collection letters
- Recording collections efforts
- Viewing & sending single invoices
- Composing emails
- Exporting & printing results

Printing client account activity reports

Generate reports of clients' monthly activities. Export or print the reports.

1. **Receivables > Client Account Activity**
2. In the **Search By** pane, make selections as needed:
   - ***Post Date From/*Post Date To**

     Required. Default is last month. Change the range, if desired. See Date Navigator.
   - **Group By**
     - **Bill To** – Party responsible for paying the invoice — such as an insurance company — if not the same as the ordering party.
     - **Sold To** – Default. Ordering party.
   - **Parent Firm**

     To see all activity across one multi-office firm, broken down by branch office, click to look up and select the firm's headquarters. See Looking up firms.
   - **Firm**

     Click to restrict search to one firm.
   - **Billing Rate Group**

     Default is ALL. To limit which groups to search, click . See Lookup panel. (Billing Rate Groups are set in Lists > Accounting.)
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to firms tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all of the firms and their transactions posted for the specified period with a total outstanding balance for each firm as a report. Firms are grouped by business unit. Each business unit has its own page(s) and total outstanding balance, with a grand total outstanding balance page at the end. The search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.

   Export the report to save it and/or edit it in another application, or print it. See Printing invoices, statements, & reports.

Reference

- Date Navigator
- Sold To vs. Bill To
- Parent Firm
- Lookup panel
- Lists > Accounting
- Business Units

Step-by-step instructions

- Looking up firms
- Printing invoices, statements, & reports

Viewing paid invoices

See all invoices paid within a specific period, listed by payment date. View and edit individual invoices. Re-send invoices. Export and print the list of paid invoices.

1. **Receivables > Paid Invoices**
2. In the **Search By** pane, click to see all invoices paid today or make selections as needed before clicking :
   - **Date Type**

     Payment Date – Default. To see invoices paid within the date range.

     Transaction Post Date – To see invoices posted within the date range.
   - ***Date From/*Date To**

     Required. Works with **Date Type.** Default is today. Change the range, if desired. See Date Navigator.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. MR9 lists all of the invoices that were paid within the specified date range with oldest first. Click a hyperlinked **Invoice No.** to view invoice details and re-send the invoice. Click **Edit** in the View Invoice window to update information. See Viewing & sending single invoices.
4. To export and save or print the list of paid invoices, click in the Paid Invoices results pane and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Viewing & sending single invoices
- Exporting & printing results

Viewing voided invoices

View all invoices voided within a specific period. View and edit invoice details. Send clients copies of voided invoices. Export and print the list of voided invoices.

1. **Receivables > Voided Invoices**

2. In the **Search By** pane, click to see all invoices voided today or make selections as needed before clicking :

   - **Date Type**

     Invoice Date – Default. To see voided invoices that were billed within the date range.

     Invoice Post Date – To see voided invoices that were posted within the date range.

     Transaction Post Date – To see voided invoices from transactions posted within the date range.

     Void Date – To see invoices voided within the date range.

   - ***Date From/*Date To**

     Required. Works with **Date Type.** Default is today. Change the range, if desired. See Date Navigator.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to voided invoices tied to specific BUs. See Lookup panel.

3. MR9 lists all of the voided invoices that meet the search criteria. Click a hyperlinked **Invoice No.** to view invoice details and send a copy of the voided invoice. Click **Edit** in the View Invoice window to update information. See Viewing & sending single invoices.

4. To export and save or print the list of voided invoices, click in the Voided Invoices results pane and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Voiding invoices
- Viewing & sending single invoices
- Exporting & printing results

Sending collection letters

After running the Aged A/R report to find clients who owe you the most money for the longest period of time, contact them — including sending collection letters with all of the details automatically filled in by MR9 and optionally with the relevant invoices attached. MR9 logs the collection letters when sent into the Email Log.

1. **Receivables > Collection Letters**
2. In Collection Letters window's **Search By** pane, you must select a firm. Other filters are optional:

   - **Party Type**

     Bill To – Default. Firm that pays invoices.

     Sold To – Firm that places orders and pays invoices unless a separate Bill To firm has been designated.

   - ***Firm**

     Required. To select a firm, see Looking up firms.

   - **Contact**

     To see invoices for a single contact at the firm, select one in the dropdown. Default is ALL.

   - **Invoice Date From/Invoice Date To**

     To include invoices posted within a specific date range, enter date(s) in the field(s) or click each field's to select date(s) in Date Navigator.

   - **Order No.**

     Enter the order number tied to an invoice or invoices.

   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to find invoice(s) for a single part of the order.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

3. Click . MR9 displays all of the invoices that meet the search criteria in numerical order. Click a hyperlinked invoice number, firm, or contact to view/edit details. See Viewing & sending single invoices, Updating firms, and Updating contacts.

NOTE: Send collection letters from Aged A/R

Eliminate the need to enter search parameters in Collection Letters by starting this collection letter process directly for any client listed in Aged A/R. See Finding overdue invoices.

4. In the results pane, check the box(es) of invoice(s) you want included in the collection letter(s).
5. Click **Collection Letter >**
   - **One collection letter per invoice**

     To send multiple letters to the same client; each letter includes information about a single invoice.
   - **One collection letter for all selected invoices**

     To send one letter to the client that compiles information about all of the selected invoices.
6. In the **Select a Letter** popup, click the desired letter template in the **Form** pane *(required).* (If no templates appear in the pane, select a different set of forms in **Form Group** dropdown.)
7. Under **Send Method,** select:
   - **Email**
     Default method of sending letters.
   - **Print**

     To send letters via the post or other delivery method.
8. If you selected Email in **Send Method** and want to include the relevant invoice(s), slide **Attach Invoice(s)** to Yes.
9. Click **Next.** MR9 generates the letter(s) with the outstanding invoice information included.
   - **If emailing,** review and edit the email if desired before sending. See Composing emails. MR9 will enter the email in the Email Log along with information on when it was sent and by who. (See Viewing email logs.)
   - **If printing,** review and edit the letter if desired before printing. See Printing letters.
10. After sending the letter(s), record your actions in the related firm listing(s) and set follow-up reminders. See Recording collections efforts.

Reference

- Collections
- Aged A/R
- Email Log
- Sold To vs. Bill To
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up firms
- Finding overdue invoices
- Viewing & sending single invoices
- Updating firms
- Updating contacts
- Composing emails
- Viewing email logs
- Printing letters
- Recording collections efforts

Following up on collection promises

Pull up the past action and/or remind list to keep collection tasks on track. Record client responses and promises, plus set reminders for further follow up.

1. **Receivables > Collection Follow-up**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the date search filters:
   - **Remind Date From/Remind Date To**

     Enter dates in either one or both of these fields, or click each field's to select date(s) in Date Navigator. (Remind Dates are set in a firm's **Collections** pane. See Recording collections efforts.)
   - **Action Type**

     Default is ALL. To search for specific types of collections actions, click . In the **Lookup Action Type** popup, uncheck the **Action Type** box, then check the box(es) of the action type(s) you want to view. Click **OK.** (Collection Action Types are set in Lists > Firms.)
   - **Action Date From/Action Date To**

     Enter dates in either one or both of these fields, or click each field's to select date(s) in Date Navigator.
   - **Collector**

     Click to select a user in charge of collecting overdue payments. See Looking up users.
3. Click . MR9 lists all of the actions that meet the search criteria along with other information about collections efforts for the listed firms.
4. Click a hyperlinked firm to view the firm's collection history. The View Firm window opens and jumps to the **Collections** pane.
5. Click **Edit** to record your current collection effort. See Recording collections efforts.

Reference

- Collections
- Date Navigator
- Lists > Firms
- Lookup panel

Step-by-step instructions

- Recording collections efforts
- Looking up users

Forecasting cash flow from collections

Based on the amounts and dates promised by clients for outstanding invoices, you can forecast cash inflow to your business. You can also monitor your collection progress with a client and make new attempts. Plus view graphs of the client's account activity.

1. **Receivables > Collection Forecast**
2. In the **Search By** pane, you must use the date search filters:
   - ***Promised Date From/*Promised Date To**

     Required. Default is today. Change the range, if wanted. See Date Navigator.
   - **Collector**

     If you want to see a forecast for a single collector's clients, click to select a user in charge of collecting overdue payments. See Lookup panel.
3. Click . MR9 lists the clients with payment-promised dates for the specified period.
4. Click a hyperlinked firm to view the firm's collection history and account overview. See Viewing entity activity.
5. If you contact the client, click **Edit** in the View Firm window to record your current collection effort. See Recording collections efforts.

Reference

- Collections
- Date Navigator
- Lookup panel
- Account Overview

Step-by-step instructions

- Viewing entity activity
- Recording collections efforts

Request Checks

If the custodian requires payment for producing records, you can enter a fee check request while you are arranging a pickup or mailing. However if you have someone (such as bookkeeper) to enter all of the requests from the vouchers, use this function instead.

Reference

- Fee Checks

Step-by-step instructions

- Entering check requests in batches
- Managing open check requests

Print Checks

Even though anyone can enter check requests, there should be one person (in the accounting department) responsible for printing custodian fee checks. You can print custodian fee checks directly from MR9. If you use *QuickBooks* to write checks, you can import your custodian fee checks into *QuickBooks* using MR9's QuickBooks Integrator.

Reference

- QuickBooks Integrator

Step-by-step instructions

- Printing custodian fee checks
- Importing checks into *QuickBooks*

Fee Checks

After printing fee checks to pay custodians who require payment before release records, you can view check details, update information, reprint checks, and note checks that have cleared your bank.

Reference

- Fee Check

Step-by-step instructions

- Searching fee checks
- Managing fee checks
- Printing custodian fee checks
- Reprinting fee checks
- Clearing payments manually

Check Reconciliation

Use this report to monitor your custodian fee spending closely. Find all of the work orders that have not been billed yet, even though the custodian fees have been spent already. Plus you can find all of the work orders that have been under billed or unpaid.

Reference

- Fee Checks

Step-by-step instructions

- Controlling custodian fee expenses

Sales Commission Report

Report lists all invoices that include a commission, grouped and subtotaled by sales rep (account executive). A commission is automatically generated from invoices on orders initiated by a sales rep's client.

NOTE: How sales commissions work in MR9

When an order is created, a particular sales rep is tied to the order. The default comes from the scheduling contact's MR9 listing (see Entering contact marketing information).

The commission is calculated by multiplying the commissionable (payable) amount by the commission rate specified in the assigned sales rep's MR9 listing (see Entering pay information).

The commissionable amount is calculated by adding all of the service items on the invoice that are flagged as **Sales Rep Commissionable** in the Service Items Master or in individual billing rate tables. (see Entering/updating billing rates).

You can override the commissionable amount in **Payables > Override Sales Commission** (see Overriding commissionable amounts).

Reference

- Sales Rep
- Service Items Master
- Billing Rates
- Override Sales Commission

Step-by-step instructions

- Printing sales commission reports
- Entering contact marketing information
- Entering pay information
- Entering/updating billing rates
- Overriding commissionable amounts

Override Sales Commission

MR9 automatically calculates commissions for sales reps. You can override the calculated commissionable amount on a single invoice without changing your commission rates.

Reference

- Sales Rep

Step-by-step instructions

- Overriding commissionable amounts

Sales Tax

If you provide taxable services to clients in states or other areas that charge a tax on receipts, enter the **sales tax** rate in the firms' listings and flag which service items are taxable. MR9 automatically calculates sales tax on invoices. This report lists all invoices with sales tax charges generated for a specific period.

NOTE: How sales tax works in MR9

To understand how sales tax works in MR9, you should be aware of the following:

- The sales tax rate is specified for each client in their MR9 listing. See Entering additional firm information.
- The sales tax is calculated by multiplying the sales taxable amount by the sales tax rate.
- The sales taxable amount is calculated by adding all of the service items on the invoice that are flagged as **Sales Taxable** in the Service Items Master or in individual billing rate tables. See Entering/updating billing rates.

Reference

- Service Items Master
- Billing Rates

Step-by-step instructions

- Generating sales tax reports
- Entering additional firm information
- Entering/updating billing rates

Reward Points Summary

View a snapshot of a firm or contact's point activity. Adjust, transfer, and redeem points. If a contact is no longer participating in your points program, you can move their points history to another contact.

IMPORTANT: Take care of the legal details first

Before setting up reward points in MR9, check what your local laws and regulations allow and what you must provide participants with, such as terms and conditions and any legal agreements you must obtain before you enroll a client in your reward program. Some states do not allow these programs for your industry, and OMTI makes no guarantees or assurances about these programs.

Step-by-step instructions

- Managing points

Reward Points History

Get an overview of clients’ point activity.

Step-by-step instructions

- Viewing point history

Reward Points Analysis

Get a monthly, quarterly, and yearly breakdown of clients' point activity.

Step-by-step instructions

- Analyzing point activity

Import Check Reconciliation Data

Automatic Bank Reconciliation is a paperless bank reconciliation procedure that imports information from an external file to clear checks automatically. Since most major banks have the ability to generate a data file that contains similar information to the "paper" statement, MR9 can accept that data, process it, and produce reports.

Reference

- Fee Checks

Step-by-step instructions

- Clearing payments automatically

Bank Reconciliation

View all custodian fee checks issued or only the ones cleared or outstanding for the specified period in this uneditable report.

Reference

- Fee Checks

Step-by-step instructions

- Finding checks
- Reconciling bank accounts

Payables preferences

System-wide preferences and defaults for Payables functions.

- **Check**

  Options to make MR9 information print properly on your preprinted checks.

- **Check Reconcilliation Data**

  Options for importing your bank statement files into MR9.

Reference

- Payables
- Print Checks
- Import Check Reconciliation Data

Step-by-step instructions

- Customizing global preferences

Entering check requests in batches

Instead of entering fee check requests one at a time when arranging pickups or mailings (see Entering & updating fee check requests in parts), you or your bookkeeper can enter all of the requests from the vouchers in batches. You can designate payment by either check or credit card.

1. **Payables > Request Checks**
2. Click **New.**
3. In the New Check window, enter the ***Order No.** and ***Part No.** (no need to include leading zeroes), then click .
4. MR9 fills in the fields in the **Order Info** pane and opens the **Check Info** pane. To enter request information, see Entering & updating check request details.
5. Click **Save >**
   - **Save & New** – To enter the check request and continue adding requests.
   - **Save & Close** – When you are finished adding requests.

Reference

- Fee Check

Step-by-step instructions

- Entering & updating fee check requests in parts
- Entering & updating check request details

Printing custodian fee checks

If you want to print checks, MR9 will create a PDF of the check information according to your settings to print on your own voucher or standard business checks. If you print checks without using MR9, you can add the check numbers here to keep your payment information up to date inside MR9.

1. **Payables > Print Checks**
2. In the Print Checks window's **Search By** pane, **Check Date From/Check Date To** defaults to today. Click or change the search parameters before clicking :
   - **Check Date From/Check Date To**

     Default is today. To change the date range, see Date Navigator.
   - **Order No.**

     Enter the entire order number.
   - **Part No.**

     Works with **Order No.** Enter the part number (no need to include leading zeroes) to search for a single part of the order.
   - **Issued By**

     The user who entered the request into the system. Default is ALL. Click to restrict search to a single user. See Looking up users.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to requests tied to specific BUs. See Lookup panel.
3. MR9 lists all of the locations (payees) along with their check amounts. Voided payments appear in red (see Managing fee checks). If you want to view/update a check's information before printing, click its **Order.Part No.** Then click **Edit** in the View Check window if you want to update the request. See Entering & updating check request details.
4. In the Print Checks window's results, check the boxes of payees you want to pay via check.
5. Click **Print Checks.**
6. In the **Check Options** popup, enter the following information:
   - **Starting Check No.**

     Enter the starting check number from the blank checks you are about to print on.

- **Voucher Checks**
  Default is No. Slide to Yes if you are using voucher checks (one check per sheet). MR9 supports *QuickBooks*-compatible laser checks (standard or voucher).

7. Click **OK.** MR9 creates a PDF file of the checks to print from *Adobe Acrobat* (see Printing PDFs from MR9), and enters the check number in the listings in the Print Checks window's results grid.

TIP: Adjust your check printing settings

If the MR9 information is not printing in the right location on your checks, enter values in **Additional Left Margin** and **Additional Top Margin** fields in System Preferences > Payables > Check to correct the printout.

TIP: Reprint checks

If you have any problem with a printed check — such as an error or the printer jammed — and you need to reprint the check, see Reprinting fee checks.

TIP: If you don't print checks from MR9, add those check numbers to MR9

If you printed checks without using MR9's Print Checks function, you can easily add the check numbers here without generating a PDF file. In the Print Checks window, check the boxes of requests you already printed checks for, then click **Generate Check No.** Enter the beginning number of the printed checks in the **Check Options** popup, then click **OK.**

Reference

- Checks preferences
- Date Navigator
- Business Units
- Results pane

Step-by-step instructions

- Looking up users
- Managing fee checks
- Entering & updating check request details
- Printing PDFs from MR9
- Reprinting fee checks

Managing fee checks

Update information about issued checks and credit card payments, remove fee checks from invoices, void checks, and enter dates payments cleared your bank.

Continued from Searching fee checks.

1. In the Fee Checks' results, click a payment's hyperlinked **Check No./Credit Card No.,** then click **Edit** in the View Check window. Or click the payment's **> Edit.**
2. To:
   - **Update payment information**

     See Entering & updating check request details.
   - **Correct fee application**

     If you applied the fee check to the wrong invoice, you can clear the invoice from the fee check entry and reapply the fee check to the correct invoice:

     In the transaction's Edit Check window, click **Clear Invoice No.** in the header.
   - **Void a payment**

     If the payment amount was wrong or you paid a wrong party, void the check/credit card payment first before issuing another one:

     In the transaction's Edit Check window, enter today's date in the **Check Info** pane's **Voided Date** field or use its Date Navigator.
   - **Clear a payment**

     If a payment has cleared your bank, update the transaction to reflect that:

     In the transaction's Edit Check window, enter the date the payment appears on your bank or credit card statement in the **Check Info** pane's **Cleared Date** field or use its Date Navigator.

     NOTE: Clear checks automatically in MR9

     You can also clear checks automatically by importing your bank statements in Import Check Reconciliation Data. See Clearing payments automatically.
3. Click **Save.**

Reference

- Fee Check
- Date Navigator
- Lookup panel

- Import Check Reconciliation Data

Step-by-step instructions

- Searching fee checks
- Entering & updating check request details
- Clearing payments automatically

Printing sales commission reports

Generate reports of invoices that include a commission, grouped and subtotaled by sales rep (account executive). Voided commissions are listed on reports as adjustments.

1. **Payables > Sales Commission Report**
2. In the **Search By** pane, click to see all the invoices with sales commissions generated today. Or specify the following search filters before clicking :
   - **Date Type**

     Default is Invoice Post Date. Select Payment Post Date in the dropdown if you pay commissions only on paid invoices.
   - ***Date From/*Date To**

     Required. Works with **Date Type.** Default is today. Change date range, if desired, in Date Navigator.
   - **Sales Rep**

     Default is all sales reps. To generate a report for a single representative, click to select the user. See Looking up users.
   - **Original/Copy**

     Default is ALL. Select Original Only in the dropdown if you do not pay commissions on copy sales. Select Copy Only if you want to see copy sales commissions only.
   - **Deduct Custodian Cost**

     Default is No. Slide to Yes if you pay commissions based on NIBO (Net Income Before Overhead), i.e., invoice amount minus the custodian fee.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. MR9 lists all of the invoices that meet the specified search condition(s) as a report, grouped by sales rep. The search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.
4. Export the report to save it and/or edit it in another application, or print it. See Printing invoices, statements, & reports.

NOTE: Voided commissions listed separately in reports

Voided invoices are listed under **Adjustments** on pages for sales representatives if **Not to void Sales Rep Commission** is not selected when voiding an invoice. See Voiding Invoices.

Reference

- Date Navigator
- Sales Rep
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up users
- Printing invoices, statements, & reports
- Voiding invoices

Overriding commissionable amounts

If the sales commission that MR9 calculated for an invoice is not what you want to pay, you can override the calculated commissionable amount for only this invoice.

1. Find commissions to override

1. **Payables > Override Sales Commission**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:
   - **Invoice No.**

     Number of the commissionable invoice.
   - **Order No.**

     Order number tied to the commissionable invoice.
   - **Part No.**

     Works with **Order No.** Enter the part number (no need to include leading zeroes) of the commissionable invoice.
   - **Date Type**

     Invoice Date is the default. Select Order Date to search for invoices by their related order's date.
   - **Date From/Date To**

     Works with **Date Type.** Enter a date range, if desired, in Date Navigator.
   - **Sales Rep**

     Click to restrict the invoice search to a single sales rep. See Looking up users.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all of the invoices that meet the specified search condition(s).

2. Override the commissionable amount

1. Click its **> Edit** to access the Edit Sales Commission window directly. Or click its hyperlinked invoice number, then in the View Sales Commission window click **Edit.**

2. In the Edit Sales Commission window, the amount in the **Sales Rep Commissionable Amount** field is already highlighted. Enter the new amount.

3. Click **Save.**

NOTE: Correct Sales Rep

If the wrong sales representative appears in **Sales Rep,** update the MR9 user in the Edit Sales Commission window by clicking ▽... **> Lookup User** next to the name and selecting the correct user. See Lookup panel.

Reference

- Sales Commission Report
- Service Item Master
- Date Navigator
- Sales Rep
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up users
- Entering/updating billing rates

Generating sales tax reports

View all invoices having sales tax charges generated for a specific period.

1. **Payables > Sales Tax**
2. In the **Search By** pane:
   - ***Post Date From/*Post Date To**

     Required. Date(s) invoices were closed. Defaults to today. Change date range, if desired, in Date Navigator.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all of the invoices that meet the specified search condition(s).
4. To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Business Units
-

Step-by-step instructions

- Exporting & printing results

Managing points

View a snapshot of a firm or contact's point activity. Adjust, transfer, and redeem points. If a contact is no longer participating in your points program, you can move their points history to another contact.

1. Find contact(s)

1. **Payables > Reward Points Summary**
2. In the **Search By** pane, use one or both entity search filters:
   - **Contact**

     Enter part of a contact's name to restrict search to one contact.
   - **Firm**

     Click to select a firm. See Looking up firms.
   - **Show Contacts with points history only**

     Default is Yes. Slide to No to view all contacts that meet the other search requirements.
3. Click . MR9 lists all of the contacts that meet the specified search condition(s).

2. Manage points

1. In the returned results, Click next to a contact name **>**
   - **Adjust Points**

     To correct an error in the amount of points earned by the contact or add bonus points:

     In the Adjust Points window, enter a positive amount in the ***Points** field to increase the contact's total points earned or a negative amount to decrease the total.

     If desired, enter an explanation in the **Remarks** field for the adjustment.
   - **Transfer Points**

     To move earned points from the contact to another contact in the same firm:

     In the Transfer Points window, enter the number of earned points in the ***Points** field you are moving from this contact.

     In the ***Transfer To** dropdown, select the contact who will receive the points.

- **Redeem Points**

  To document the contact's use of points:

  In the Redeem Points window, select how the contact used the points in the **Redemption Method** dropdown. (Methods and their options are set in Lists > Others.)

  Enter the number of earned points in the ***Points** field the contact is redeeming.

  If desired, enter an explanation in the **Remarks** field about the redemption.

- **Move Points History**

  To move the contact's entire points status to another contact:

  In the Move Points History window, the contact's point history totals are displayed. In the Move Points History To pane, the contact's firm is the default in **Firm.** If moving the history to a contact at a different firm, click **> Lookup Firm.** See Looking up firms.

  Select the contact you are moving the points history to in the ***Contact** dropdown.

- **Reward Points History**

  To open Reward Points History for the contact. See Viewing point history.

2. Click **Save.**

3. ## Export/print results

   To export and save the Reward Points Summary results, click and select an export file type. See Exporting & printing results.

Reference

- Lists > Others

Step-by-step instructions

- Looking up firms
- Viewing point history
- Exporting & printing results

Viewing point history

Get an overview of clients' point activity. See at a glance what activities have been done by which contacts and how their points history has been affected.

1. Set search parameters

1. **Payables > Reward Points History**
2. In the **Search By** pane, specify the following search filters:
   - ***Date From/*Date To**

     Default is today. Change date range, if desired, in Date Navigator.
   - **Firm**

     Click to select a firm. See Looking up firms.
   - **Contact**

     Click to restrict search to one contact. See Looking up contacts.
   - **Activity Type**

     Categories of what can be done with points. Default is ALL. Click to restrict search to specific activities. See Lookup panel.
   - **Status**

     Stages of point activities. Default is ALL. Click to restrict search to specific stages. See Lookup panel.

2. View results

Click . MR9 lists all of the contacts and their point activity that meet the specified search condition(s). The list is an overview only and uneditable.

3. Export/print results

To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel

Step-by-step instructions

- Looking up firms
- Looking up contacts
- Exporting & printing results

Analyzing point activity

Get a breakdown of clients' point activity by month, quarter, and year.

1. Set search parameters

1. **Payables > Reward Points Analysis**
2. In the **Search By** pane, specify the following search filters:

   - **Activity Type**

     Categories of what can be done with points. Default is ALL. Click to restrict search to specific activities. See Lookup panel.

   - ***Transaction Date From/*Transaction Date To**

     Default is this month. Change date range, if desired, in Date Navigator.

   - **Firm**

     Click to select a firm. See Looking up firms.

   - **Contact**

     If a firm is selected, you can restrict the search to a single contact at the firm by selecting them in the dropdown.

   - **Redemption Type**

     Categories of what users can get for points. Default is ALL. Click to restrict search to specific redemption types. See Lookup panel. (Redemption Types are set in Lists > Others.)

2. View results

1. Click . MR9 displays a list of the contacts, grouped by firm, that meet the specified search condition(s) in year-to-date totals. The list is uneditable.
2. To view details, click **Expand/Collapse >**

   - **Expand Firm**

     Firms expand to display points by contact.

   - **Collapse Firm**

     Contact points listings are merged together to display points by firm.

- **Expand Date**

  Yearly grouping(s) expand to display points by quarters and months.

- **Collapse Date**

  Expanded grouping(s) condense to display points by year.

- See Using interactive reports for more information.

3. ## Export/print results

   To export and save the results, click **> Export to Excel.** See Exporting & printing results.

Reference

- Lookup panel
- Date Navigator
- Lists > Others

Step-by-step instructions

- Looking up firms
- Looking up contacts
- Using interactive reports
- Exporting & printing results

Controlling custodian fee expenses

If you took a poll of firm owners and asked what the most difficult task in running a records retrieval business is, the almost overwhelming answer would be: keeping custodian expenses under control. Remember, you can't control what you can't see. Use Check Reconciliation to monitor your custodian fee spending closely so you can address any issues you find.

1. Set search criteria

1. **Payables > Check Reconcilation**
2. In the **Search By** pane, click to see all of today's work orders that haven't been billed yet, or specify the following search filters before clicking :

   - **Type**
     - **Not Billed** – Default. To find all of the work orders with custodian fees that have not been billed yet, even though the fees have been spent already.
     - **Under Billed** – To find all of the work orders that have been under billed (i.e., the billed amount is less than the fee paid).
     - **Correctly Billed** – To find all of the work orders that have been billed correctly (i.e., the billed amount is equal or greater than the fee paid).
     - **Unpaid** – To find all of the work orders that have been billed but not yet paid by the client.
   - ***Check Date From/*Check Date To**

     Default is today. Change date range, if desired, in Date Navigator.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

2. View results

MR9 lists all of the work orders that meet the specified search condition(s). To view/update a check, click its hyperlinked **Order.Part.No.** (You can view but not update a printed check.) See Entering & updating check request details.

3. Export/print results

To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Business Units
- Lookup panel

Step-by-step instructions

- Entering & updating check request details
- Exporting & printing results

Reconciling bank accounts

Reconciling bank accounts is fancy terminology for "balancing my checkbook," which might be one of the most annoying tasks connected with paying custodians. After your bank statement arrives, find some uninterrupted moments to compare it to the information in MR9 and update your MR9 records.

1. Search for checks

Create a list of checks for a specific time period to clear.

1. **Payables > Bank Reconcilation**
2. In the **Search By** pane, select Check Date in the **Date Type** dropdown.
3. Change date range in ***Date From/*Date To** to match dates of cleared checks on your bank statement. See Date Navigator.
4. Select Outstanding Checks in **Status** dropdown.
5. If you want to restrict search to fee checks tied to specific BUs, click next to **Business Units** field. See Lookup panel.
6. Click . MR9 lists all of the checks that meet the specified search condition(s). The list is an overview only and uneditable. Leave the Bank Reconciliation window open.

2. Reconcile checks with bank statements

1. To reconcile MR9 records with your bank account, review the list against your bank statement to look for any checks that are on your bank statement but not cleared in MR9.
2. **Payables > Fee Checks**
3. Find a check that was cleared by the bank but not in MR9 in the Bank Reconciliation window, then mark it as cleared in its Fee Checks > Edit Check window. See Entering & updating check request details.

Repeat this reconcilliation step again until all checks that have cleared your bank are also marked as cleared in MR9.

NOTE: Clear checks automatically in MR9

You can also clear checks automatically by importing your bank statements in Import Check Reconciliation Data. See Clearing payments automatically.

3. **Export/print results**

   To export and save or print the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Import Check Reconciliation Data

Step-by-step instructions

- Entering & updating check request details
- Clearing payments automatically
- Exporting & printing results

Business Analysis

Provides an instant snapshot of your business, with the sales amount and units shown for different periods for comparison.

Step-by-step instructions

- Analyzing your business

Misc. Sales

This report summarizes each client's billed miscellaneous charges for a specific date range. You can limit the report to one or more service items. One way to use this report is to find out which clients are buying services you introduced recently.

Step-by-step instructions

- Producing miscellaneous sales reports

Client Rating Report

This report lists invoiced amounts (starting with O&1), grouped and subtotaled by client. Sorting this list by amount can generate a holiday gift list.

Step-by-step instructions

- Producing client rating reports

Insurance Billing

This report lists each invoice billed directly to an insurance company (or other third party), grouped and subtotaled by Bill To client (insurance company/third party) and Sold To client.

Reference

- Sold To vs. Bill To

Step-by-step instructions

- Producing insurance billing reports

Processor Production

View all invoices generated (i.e., records obtained) for a specific period, grouped and subtotaled by processor or client rep.

Reference

- Client Rep
- Processor

Step-by-step instructions

- Producing processor production reports

Tracking Productivity Analysis

Do you want to find out how many tracking items have been finished on time? Analyze productivity by item, step, processor, or user.

Reference

- Tracking

Step-by-step instructions

- Analyzing tracking productivity

Tracking Notes Log Analysis

View how many notes by note type were made today or for a specific date range, broken down by who entered the associated part or by order number. MR9 displays the note amounts in an interactive report.

Reference

- Tracking

Step-by-step instructions

- Analyzing tracking notes logs

Analyzing your business

Get an instant snapshot of your business. Drill down in this interactive report to get more details. Compare the current month-, quarter- and year-to-date totals to the previous period. Get total amounts for any period of time. Export the results as a report.

1. Set parameters

1. **Reports > Business Analysis**
2. In the **Search By** pane, specify the following search filters:

   - ***Post Date From/*Post Date To**

     Required. Invoices posted for the specified period will be summarized. Default is today. Change date range, if desired, in Date Navigator.

   - **Party Type**

     - **Bill To** – Third parties who pay the invoices, e.g., insurance companies who are paying for litigation services their lawyers order from you.
     - **Bill To Parent** – Multi-office third parties.
     - **Sold To** – Default. Clients ordering the services.
     - **Sold To Parent** – Multi-office firms that ordered services.

   - **Firm**

     Leave blank unless you are analyzing business for a particular client. To select a firm, see Looking up firms.

   - **Party's State**

     Default is ALL. If you pay local business taxes based on the total revenue generated within your own state, click and select the state in the **Lookup Party's State** popup to break out that information. See Lookup panel.

   - **Order No.**

     Enter the complete order number if you are analyzing business for a particular order.

   - **Show Quarterly**

     Default is No. MR9 will display billed amount totals by years and months (in expanded view). Slide to Yes to add quarterly totals to expanded view.

   - **Business Units**

Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

2. View results

1. Click . MR9 displays a snapshot of the billed services that meet the specified search condition(s), broken down into number of units sold, billed amounts, and voided/credited amounts in year-to-date and all-time totals.
2. To view details of:
   - **All results**
     Click **Expand/Collapse >**
     - **Expand Service:** Service Groups expand to display amounts by service item and subtotals for the Service Groups and Service Subgroups. Subtotal rows have bold headers and a gray background to differentiate them.
     - **Expand Date:** Yearly grouping(s) expand to display amounts by quarters (optionally) and months.
   - **A single Service Group**
     Click ⊕ next to the Service Group. MR9 displays the Service Subgroup(s) amounts and the Service Group's subtotals. Click ⊕ next to a Service Subgroup to see the breakdown by service item and the Service Subgroup's subtotals. Subtotal rows have bold headers and a gray background to differentiate them.
   - **A single year**
     By month and quarter (optionally), click ⊕ next to date headers. If you selected Show Quarterly in your search criteria, MR9 will display the year broken down into quarters first. Click ⊕ next to a quarter to see monthly totals.
   - See Using interactive reports for more information.

3. Export/print results

To export and save the results, click **> Export to Excel.** See Exporting & printing results.

Reference

- Date Navigator
- Sold To vs. Bill To
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up firms
- Using interactive reports
- Exporting & printing results

Producing miscellaneous sales reports

Generate reports summarizing clients' miscellaneous charges. Reports can show each client's amount totals and averages for specific date ranges, clients, service items, and business units.

1. **Reports > Misc. Sales**
2. In the **Search By** pane, specify the following search filters:
   - ***Post Date From/*Post Date To**
     Required. Enter a posted invoice date range. See Date Navigator. Default is today. Miscellaneous charges on posted invoices for the specified period will be summarized.
   - **Service Item Subgroup**
     Default is the first 9. Misc. Charge subgroup in your list of **Service Item Subgroups** and the only options in the dropdown are your 9. Misc. Charge subgroups. See Organizing service items.
   - **Service Items**
     Works with **Service Item Subgroup.** Default is ALL. To restrict search to specific service item(s), click and make selection(s) in the **Lookup Service Items** panel. See Lookup panel. Only those service items belonging to the selected **Service Item Subgroup** above appear in the **Lookup Service Items** panel.
   - **Sold To Parent Firm**
     To see sales for all of the branches of a multi-office company which ordered services, click and search for the parent company in the **Lookup Parent Firm** popup. See Looking up firms.
   - **Sort By**
     - **Firm Name** – Default. Results will appear in alphabetical order.
     - **Total Amount** – Results will appear in ascending order of total amount billed.
   - **Show Detail**
     Default is Yes. MR9 will present results broken down by contact within each firm. Slide to No to have MR9 compile results from all contacts in a firm into one entry in the list.
   - **Business Units**
     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to miscellaneous sales tied to specific BUs. See Lookup panel.

3. Click . MR9 summarizes all of the miscellaneous sales that meet the specified search condition(s) as a report. The selected service item categories appear at the top of the report and other search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.
4. Export the report to save it and/or edit it in another application, or print it. See Printing invoices, statements, & reports.

Reference

- Date Navigator
- Lookup panel
- Sold To vs. Bill To
- Parent Firm
- Business Units

Step-by-step instructions

- Organizing service items
- Looking up firms
- Printing invoices, statements, & reports

Producing client rating reports

This report lists invoiced amounts (starting with O&1), grouped and subtotaled by client. Each client is listed with the original amount, copy amount, and payment history.

1. **Reports > Client Rating Report**
2. In the **Search By** pane, specify the following search filters:

- ***Post Date From/*Post Date To**

  Required. Enter an invoice date range. See Date Navigator. Default is today. Invoices posted for the specified period will be summarized.

- **Group By**

  - **Bill To** – Firm that is paying the invoice.
  - **Sold To** – Default. Firm that ordered service items.

- **Sold To Parent Firm/Bill To Parent Firm**

  Leave blank unless you want to analyze the rating for (subsidiary) firms that are part of a particular multi-office firm.

- **Sold To Firm/Bill To Firm**

  Leave blank unless you want to analyze the rating for a particular firm.

- **Billing Rate Group**

  Default is ALL. To limit which groups to search, click . See Lookup panel. (Billing Rate Groups are set in Lists > Accounting.)

- **Sort By**

  - **Amount** – Default. To see report in descending order starting with amounts for Originals, then Copies.
  - **Firm Name** – To see report in alphabetical order.

- **Show Detail**

  Default is Yes. MR9 will show amounts attributable to contacts within firms. Slide to No to see amounts summarized by firm and any zero amounts hidden.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

3. Click . MR9 lists all of the invoices that meet the specified search condition(s) as a report. The search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.

4. Export the report to save it and/or edit it in another application, or print it. See Printing invoices, statements, & reports.

TIP: Another way to build holiday gift lists

Another way to come up with a meaningful holiday gift list is to run the Order Analysis report sorted by the number of net orders. Then you will know which clients are generating the most business for your firm and to whom you want to send gifts of appreciation. See Know who is calling.

Reference

- Date Navigator
- Parent Firm
- Sold To vs. Bill To
- Lookup panel
- Lists > Accounting
- Business Units
- Order Analysis

Step-by-step instructions

- Printing invoices, statements, & reports
- Know who is calling

Producing insurance billing reports

When insurance companies ask for a report that breaks down their invoices by law firm and attorney, provide this report, which lists invoices billed directly to an insurance company (or other third party), grouped and subtotaled by client and insurance company with separate pages for each Bill To Firm.

1. **Reports > Insurance Billing**
2. In the **Search By** pane, specify the following search filters:

   - ***Post Date From/*Post Date To**

     Required. Enter an invoice date range. See Date Navigator. Default is today. Invoices posted for the specified period will be included.

   - **Bill To Parent Firm**

     Leave blank unless you want to produce a report of (subsidiary) firms that are part of a particular multi-office firm.

   - **Bill To Firm**

     Leave blank unless you want to produce a report for a single firm.

   - **Billing Rate Group**

     Default is ALL. To limit which groups to search, click . See Lookup panel. (Billing Rate Groups are set in Lists > Accounting.)

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

3. Click . MR9 lists all of the invoices that meet the specified search condition(s) as a report, grouped by Sold To Firms under each Bill To Firm, and includes a grand total page at the end of the report. The search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.
4. Export the report to save it and/or edit it in another application, or print it. See Printing invoices, statements, & reports.

Reference

- Date Navigator
- Parent Firm
- Lookup panel
- Lists > Accounting
- Business Units

Step-by-step instructions

- Printing invoices, statements, & reports

Producing processor production reports

View all invoices generated for a specific period, grouped and subtotaled by processor or client rep. Print out copies.

1. **Reports > Processor Production**
2. In the **Search By** pane, specify the following search filters:
   - **Type**
     - **Client Rep** – Users who oversee orders on behalf of the clients.
     - **Processor** – Default. Case coordinators who processed invoiced orders.
   - ***Post Date From/*Post Date To**

     Required. Default is today. Enter a date range. See Date Navigator. Invoices posted for the specified period will be summarized.
   - **Processor/Client Rep**

     Leave blank unless you want to analyze the production for a particular processor or client representative. To see a report for a single processor/client rep, click . See Looking up users.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . MR9 summarizes all of the invoices that meet the specified search condition(s) as a report. The search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.
4. Export the report to save it and/or edit it in another application, or print it. See Printing invoices, statements, & reports.

Reference

- Processor
- Client Rep
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up users
- Printing invoices, statements, & reports

Analyzing tracking productivity

See how many tracking items have been finished on time or are overdue, by item, step, processor, or user the step was assigned to.

1. Set parameters

1. **Reports > Tracking Productivity Analysis**
2. In the **Search By** pane, specify the following search filters:
   - **Type**
     - **By Item** – Default. Lists all tracking items as categories.
     - **By Step** – Lists any tracking items that have completed steps within the selected time frame.
     - **By Processor-Item** – Lists all tracking items by processor/case coordinator, grouped by processor.
     - **By Assign-To Step** – Lists all tracking items and their steps assigned to users, grouped by user.
   - ***Finished Date From/*Finished Date To**

     Required. Completed tracking item date range.
   - **Show Quarterly**

     Default is No. MR9 displays tracking item totals by years and months (in expanded view). Slide to Yes to add quarterly totals to expanded view.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to items in orders tied to specific BUs. See Lookup panel.

2. View results

1. Click . MR9 summarizes all of the items that meet the specified search condition(s) as an interactive report.
2. To view details of:
   - **All results**

     Click **Expand/Collapse >**

- **Expand Item:** *(If searched by item)* All items listed expand to display their type, i.e., their completion status.
- **Expand Step:** *(If searched by step)* All items listed expand to display steps and their type, i.e., their completion status.
- **Expand Processor:** *(If searched by processor-item)* All processors listed expand to display their items and each item's type, i.e., their completion status.
- **Expand Assign To:** *(If searched by assign to-step)* All users listed expand to display their assigned items, each item's current step, and the step's type, i.e., their completion status.
- **Expand Date:** Yearly grouping(s) expand to display amounts by months.

- **Single result**

  Click ⊕ next to the result. MR9 displays the next level of the result's details.

See Using interactive reports for more information.

3. ## Export/print results

   To export and save the results, click **> Export to Excel.** See Exporting & printing results.

Reference

- Tracking
- Lookup panel
- Business Units

Step-by-step instructions

- Using interactive reports
- Exporting & printing results

Analyzing tracking notes logs

View how many notes by note type were made today or for a specific date range, broken down by who entered the associated part or by order number. MR9 displays the note amounts in an interactive report.

1. **Set parameters**
    1. **Reports > Tracking Notes Log Analysis**
    2. In the **Search By** pane, specify the following search filters:
        - **Type**
            - **By Entered By** – Default. To see tracking note amounts by MR9 users who left notes.
            - **By Order No.** – To see tracking note amounts by order number.
        - ***Entered Date From/*Entered Date To**

          Required. Date range of when users left tracking notes.
        - **Tracking Item**

          Default is ALL. Click to select specific type(s) of items/workflows you track. (Tracking Item categories are set in Lists > Tracking.)
        - **Notes Type**

          Default is ALL. Click to select specific type(s) of notes.
        - **Entered By**

          Default is ALL. Click to select specific MR9 users who left notes.
        - **Order No.**

          Enter the complete order number to see only tracking notes for a particular order.
        - **Show Quarterly**

          Default is No. MR9 displays tracking notes totals by years and months (in expanded view). Slide to Yes to add quarterly totals to expanded view.
        - **Business Units**

          Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to tracking notes in orders tied to specific BUs. See Lookup panel.
2. **View results**
    1. Click . MR9 lists tracking note amounts that meet the specified search condition(s) as an interactive report.
    2. To view details of:
        - **All results**

          Click **Expand/Collapse >**
            - **Expand Entered By:** *(If searched by entered by)* All entries listed expand to break down note amounts by note type.

- **Expand Order No.:** *(If searched by order number)* All entries listed expand to break down note amounts by order part number.
- **Expand Date:** Yearly grouping(s) expand to display amounts by quarters (optionally) and months.

- **Single time period**

  Click next to a year to see note totals by month — and by quarter if you slid **Show Quarterly** to Yes.

- **Single result**

  Click next to the result. MR9 displays the next level of the result's details.

See Using interactive reports for more information.

3. **Export/print results**

   To export and save the results, click **> Export to Excel.** See Exporting & printing results.

Reference

- Tracking
- Lists > Tracking
- Lookup panel
- Business Units

Step-by-step instructions

- Using interactive reports
- Exporting & printing results

Bulk Import

Instead of re-keying your existing client and location information into MR9, export them to a *Microsoft Excel* spreadsheet from your application, then import them into MR9.

Reference

- Microsoft Excel

Step-by-step instructions

- Importing entities from other systems

Bulk Update

If you have a number of entities that need the same information changed, save time by changing them all at once.

Step-by-step instructions

- Updating multiple firms at once
- Updating multiple contacts at once
- Updating multiple locations at once

Tag Manager

If you use tags to organize firms, contacts, and locations, you can add or remove tags from multiple entities at once with **Tag Manager —** plus print envelopes and labels for mailings or email tagged entities.

Reference

- Tags
- Entities
- Firms
- Contacts
- Locations

Step-by-step instructions

- Managing tags

Form Templates

Form Templates is a tool for managing forms and letters. Like *Microsoft WordPad* it's a basic word processor — but it includes data merge fields and is designed to work with MR9 functions.

TIP: Customize the default templates & create your own

MR9 comes with a set of form templates to cover a variety of needs. Edit the existing forms and also use them to create additional templates for forms like:

- Order status confirmations
- Custodian letters
- Cover sheets
- Notices
- Scope Attachments
- Payment receipts
- Collections letters

Step-by-step instructions

- Creating/updating forms & letters

Label Templates

Store label templates you create in DYMO software to use in MR9 to print labels that include MR9 data. Labels you save in MR9 are shared across your company automatically.

Reference

- Labels
- DYMO

Step-by-step instructions

- Creating DYMO label templates
- Managing label templates

Notes Finder

There are many places in MR9 to keep notes so it is sometimes difficult to remember exactly where a particular note was entered. Use **Notes Finder** to search your Notes Logs for notes entered by users and automatic notes generated by MR9.

Reference

- Notes Logs

Step-by-step instructions

- Searching notes

Repository Download Log

After setting up MR9 to record repository activity, track all file download activities performed by in-house staff as well as by clients via MR Connect as required by general security rules for business applications. Give contacts the ability to track their own download activity in MR Connect.

Reference

- MR Connect

Step-by-step instructions

- Tracking inhouse and online repository access

Download Backup File

Download backup files of your MR9 database from up to 7 days in the past.

Step-by-step instructions

- Downloading backup files of your database

Email Log

Emails sent from MR9 — such as collection letters, runner notifications, repository notifications, invoices, and statements — are automatically logged in this function so you can refer to them later.

Reference

- Collection Letters
- Send Forms
- Invoices
- Send Payment Receipts
- Repository Notifications
- Statements
- Notify Runners

Step-by-step instructions

- Viewing email logs

Merge History

You can merge contacts, firms, and locations into other similar entities in MR9 and the event is recorded in the remaining entity’s Notes Log. Use this function to review merges for the current month or any date range.

Reference

- Notes Log

Step-by-step instructions

- Viewing merge histories

Query Maker

If MR9 does not include a report you need, **Query Maker** is a tool that you can use to create your own simple reports from a single table — and some preset table combinations — in your MR9 database. You can save your queries for reuse, share them with your co-workers, use queries others in your company made, and download queries from other sources to edit or use as is.

TIP: Use Data Reader for more complex reports

If you want to build reports that use results from multiple tables in your MR9 database, add the Data Reader plug-in to MR9. It allows you to use your MR9 data in more complex ways, including custom reports and in other applications.

Reference

- Database
- SQL
- Data Reader

Step-by-step instructions

- Creating custom reports
- Using published queries

QuickBooks Integrator

QuickBooks Integrator streamlines the integration of MR9 data into *QuickBooks,* a popular accounting package used by many records retrieval and other legal support businesses.

NOTE: Integrator imports MR9 data into *QuickBooks* for you

With MR9's QuickBooks Integrator, you can:

- Import contacts/customers and locations/vendors from MR9 into *QuickBooks,* eliminating the need to re-key information.
- Import invoices that were generated in MR9 directly into *QuickBooks* so that you can run consolidated financial statements.
- Import payments received and other transactions directly into *QuickBooks* so that your bank deposits record and account balances will be accurate.
- Import custodian fee checks directly into *QuickBooks* so that you can reconcile your bank account easily.

IMPORTANT: Set up *QuickBooks* to work with MR9

Before you can import MR9 data into *QuickBooks,* you must:

- Enter your *QuickBooks* information in System Preferences.
- Desktop version only: Download a free remote connector application from *QuickBooks* and set it up to enable secure remote access to your *QuickBooks.* See Preparing to use *QuickBooks Destop* with MR9.

Reference

- QuickBooks preferences

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with MR9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Importing checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Tools preferences

System-wide preferences and defaults for Tools functions.

- **Email Log**

  Options for which emails MR9 saves and how long they are stored.

- **QuickBooks**

  Information needed for integrating MR9 data into your *QuickBooks* program, either the desktop or online version.

Reference

- Email Log
- QuickBooks Integrator

Step-by-step instructions

- Customizing global preferences

Importing entities from other systems

If you have an existing database of firms, contacts, and/or locations and a copy of *Microsoft Excel*, you can import the entries into MR9 instead of starting each entity from scratch.

1. Create *Excel* spreadsheet

1. Export your data from an existing application to an *Excel* spreadsheet.
2. To import your data into MR9, the *Excel* spreadsheet must have the same column headers in the same order as the **Bulk Import** tool headers in MR9. Depending on which type of entities you are importing, download the corresponding *Excel* template to use to set up your spreadsheet correctly:
   - **Firms** – Firms Excel template
   - **Firms with Contacts** – Firms with Contacts Excel template
   - **Locations** – Locations Excel template
3. Copy and paste your data into the template. While you must have the exact column headers in the exact same order, you do not have to populate all the fields in the spreadsheet. The only required fields for each row in the spreadsheet are:
   - **Firms template:**
     Firm Name
   - **Firms with Contacts template:**
     Firm Name plus **Full Name** and/or **First Name** & **Last Name.** If you have more than one contact at a firm, each contact must have their own row with the firm name included.
   - **Locations template:**
     Location Name
4. When you have finished copying data into the template, save the spreadsheet in *Excel.*

TIP: Prepare *Excel* data correctly

In addition to the required fields in each row, if you are including an entity's state, be sure to use the 2-letter USPS abbreviation. If you are including email addresses for contacts or locations, each entity should have only one email address.

2. Import into MR9

1. **Tools > Bulk Import**

2. In the **Search By** pane of the Bulk Import window:

   - **Type**

     Select the type of spreadsheet you are importing:

     - **Firms** – Default. For spreadsheets made with the Firms template.
     - **Firms+Contacts** – For spreadsheets made with the Firms with Contacts template.
     - **Locations** – For spreadsheets made with the Locations template.

   - ***File**

     Required. Click and find the spreadsheet's .xlsx file.

3. Click . If the spreadsheet was formatted correctly, the data will import into the Bulk Import results grid. If you receive a popup error message instead, click **OK** and reformat your *Excel* spreadsheet to resolve the error and select the revised file to import again.

4. In the Bulk Import results grid, you can view your entries but not edit them. If you see any errors, edit your *Excel* spreadsheet and re-import the file or edit the entries in MR9 after importing.

5. Click **Import.**

6. MR9 adds the entries to the appropriate Entity database. When the import is complete, click **OK** in the pop-up that appears.

7. To view and/or revise the entries in MR9 see Updating contacts, Updating firms, and Updating locations.

IMPORTANT: MR9 does not check entries for duplicates

When importing entities into MR9, MR9 does not check the database for duplicate entries. If you discover duplicate entities, you can either delete the duplicate or merge the entries. See Removing entities.

Reference

- Firms
- Contacts
- Locations
- Microsoft Excel
- Firms Excel template
- Firms with Contacts Excel template
- Locations Excel template

Step-by-step instructions

- Updating contacts
- Updating firms
- Updating locations
- Removing entities

Updating multiple firms at once

If you have a number of firms that need the same information changed, for example you are going to start charging late fees on overdue invoices, save time by changing all of the affected firms at once.

1. **Tools > Bulk Update**
2. In the Bulk Update window, select Firms in the **Entity** dropdown.
3. Select the field you want to update in the **Choose field to update** dropdown:
   - **Account Status**

     Default. To change the actionable financial status of the firms, such as COD or bankrupt. (Account Statuses and default are set in Lists > Firms.)
   - **Always print detail on invoices**

     To show detailed breakdowns on the firms' invoices or not.
   - **Billing Rate Group–Billing Rate**

     To change the billing rate table for the firms. (Billing Rate Groups are created and default selected in Lists > Accounting. Billing rate tables are set up and assigned to a group in Billing Rates.)
   - **Class**

     To change the quality designation or ranking of the firms. (Classes and default are set in Lists > Firms.)
   - **Client Rep**

     To change the MR9 user who will oversee orders on behalf of the firm.
   - **COD**

     To designate the firms as Cash on Delivery or not.
   - **Collector**

     To change the MR9 user responsible for collecting payments from the firms.
   - **Consolidate Statement**

     To change whether monthly statements are printed for each contact at this firm separately or combined and sent to "Accounts Payable."
   - **Discount Rate**

     To change the percentage you deduct if you offer a negotiated discount on all the firms' invoices. What's discountable is specified at the service item level. See Setting up Service Item Master.

- **Do not attempt marketing**

  To change whether you send the firms marketing or promotional matter from your company or not.

- **Finance Charge Rate**

  To change the percentage (e.g., "1.200") you charge the firms monthly on past-due invoices.

- **Firm Type**

  To change the category the firms are classified by. (Firm Types and default are set in Lists > Firms.)

- **Invoice Past Due in Days**

  To change the deadline in business days past the payment terms of invoices for the firms to render payment before MR9 notifies you to start collection efforts.

- **Late Charge Rate**

  To change the percentage you charge the firms as a one-time account service fee on past-due invoices.

- **Parent Firm**

  To change the firm designated as the firms' headquarters in a multi-company organization.

- **Payment Terms**

  To change the terms for payment that will appear on the firms' invoices. (Payment Terms and default are set in Lists > Accounting.)

- **Rating**

  To change the firms' credit rating. (Rating types and default are set in Lists > Firms.)

- **Sales Rep**

  To change the sales representative/account executive the firms belong to.

- **Sales Tax Rate**

  To change the percentage for the state sales tax for the firms.

- **Source**

  To change where the firms heard of you. (Sources and default are set in Lists > Firms.)

- **Statement Sending Method**

  To change how you send consolidated statements to the firms.

4. Selections in **Set value to** vary depending on the field you chose to update above. If you selected:

   - **Account Status**

     Select a value in the dropdown.

   - **Always print detail on invoices**

     Default is Yes. Slide to No if you do not want to send the firms detailed invoices.

   - **Billing Rate Group–Billing Rate**

     Select a Billing Rate Group in the first dropdown, then the specific Billing Rate Table in the second dropdown.

   - **Class**

     Select the quality designation or ranking you want to change the firms to in the dropdown.

   - **Client Rep**

     Click . See Looking up users.

   - **COD**

     Default is No. Slide to Yes if you want the firms to pay invoices in full upon delivery.

   - **Collector**

     Click . See Looking up users.

   - **Consolidate Statement**

     Default is No. Slide to Yes if you want to send the firms one statement for all of their contacts' invoices.

   - **Discount Rate**

     Enter the percentage (e.g., "8.000") you want to deduct on the firms' invoices.

   - **Do not attempt marketing**

     Default is No. Slide to Yes if you want to avoid sending the firms your company's marketing or promotional materials.

   - **Finance Charge Rate**

     Enter the percentage (e.g., "1.200") you want to charge the firms monthly on past-due invoices.

   - **Firm Type**

     Select the category you want to change the firms to in the dropdown.

- **Invoice Past Due in Days**

  Enter the number of business days past the payment terms of invoices for the firms to render payment before MR9 notifies you to start collection efforts.

- **Late Charge Rate**

  Enter the percentage (e.g., "2.000") you want to charge the firms as a one-time account service fee on past-due invoices.

- **Parent Firm**

  Click . To find the headquarters of a multi-company organization, see Looking up firms.

- **Payment Terms**

  Select the terms that will appear on invoices in the dropdown.

- **Rating**

  Select the credit rating you want to change the firms to in the dropdown.

- **Sales Rep**

  Click . See Looking up users.

- **Sales Tax Rate**

  Enter the percentage (e.g., "7.000") you want to collect from the firms for the state sales tax.

- **Source**

  Select where the firms heard of you in the dropdown. (Source options are set in Lists > Firms.)

- **Statement Sending Method**

  Select the delivery method for sending consolidated statements to the firms in the dropdown:

  - **Don't Send** – This firm does not want to receive monthly statements.
  - **Email** – Default. For sending to firm's Accounting notification email address.
  - **Print** – For sending via USPS or other delivery method.

5. Click **Next.**
6. In the **Update To** panel, choose one:

   - **All firms**

     To change every listing in Firms.

- **All active firms**

  To change only those listings for firms that are still doing business with you.

- **Specific firms**

  Default. To select a custom set of firms to update.

  1. Select a filter in the **Search By** dropdown:

     - **Firm Name**

       Default. To search for firms with a common name, enter part of the name in **Search Criteria.**

     - **City**

       To search for firms in one city, enter part of the city name in **Search Criteria.**

     - **Parent Firm**

       To search for firms that are part of a multi-companyorganization, click . See Looking up firms.

     - **State**

       To search for firms in one state or multiple states, click . Then select states in the **Lookup State** panel. See Lookup panel.

  2. Click . MR9 displays all the firms that meet the search criteria.

  3. Check the boxes of firms to update.

7. Click **Update.** If you selected the All firms option, an alert will appear asking if you mean to update every firm in your database. If so, click **Yes.**

8. MR9 updates the entries. Click **OK** in the operation successful popup that appears.

CAUTION: Update All means your entire firm database

Select the All firms choice in the **Update To** panel only when you want to update the field in every firm in your database. *The Bulk Update function cannot be stopped while it is executing an update and you cannot undo or roll back an update.* Use Update All with caution. If you want to update all of the firms in the **Results** grid in the **Update To** panel, check the box in the **Results** header to select them all then click **Update.**

Reference

- Firm
- COD
- Lists > Firms
- Parent Firm
- Lists > Accounting

- Billing Rates
- Client Rep
- Send Statements
- Sales Rep
- Lookup panel
- Results pane

Step-by-step instructions

- Setting up Service Item Master
- Looking up firms

Updating multiple contacts at once

If you have a number of contacts that need the same information changed, for example you have a new sales representative for your contacts, save time by changing all of the affected contacts at once.

1. **Tools > Bulk Update**
2. In the Bulk Update window, select Contact in the **Entity** dropdown.
3. Select the field you want to update in the **Choose field to update** dropdown:

   - **Billing Rate Group–Billing Rate**

     Default. To change the billing rate table for the contacts. (Billing Rate Groups are created and default selected in Lists > Accounting. Billing rate tables are set up and assigned to a group in Billing Rates.)

   - **Client Rep**

     To change the MR9 user who will oversee orders on behalf of the contact.

   - **Contact Type**

     To change the category the contacts are classified by. (Contact Types and default are set in Lists > Contacts.)

   - **Do not attempt marketing**

     To change whether you send the contacts marketing or promotional matter from your company or not.

   - **Gender**

     To change the designated gender of the contacts. (Gender types and default are set in Lists > Contacts.)

   - **Invoice Sending Method**

     To change how you send invoices to the contacts.

   - **Rating**

     To change the contacts' credit rating. (Rating types and default are set in Lists > Contacts.)

   - **Sales Rep**

     To change the sales representative/account executive the contacts belong to.

   - **Salutation**

     To change the terms of address used in letters or messages for contacts, e.g., Mr. or

Ms. (Terms of address and default are set in Lists > Contacts.)

- **Statement Sending Method**

  To change how you send statements to the contacts.

4. Selections in **Set value to** vary depending on the field you chose to update above. If you selected:

   - **Billing Rate Group–Billing Rate**
     Select a Billing Rate Group in the first dropdown, then the specific Billing Rate Table in the second dropdown.

   - **Client Rep**

     Click . See Looking up users.

   - **Contact Type**

     Select the category you want to change the contacts to in the dropdown.

   - **Do not attempt marketing**

     Default is No. Slide to Yes if you want to avoid sending the firms your company's marketing or promotional materials.

   - **Gender**

     Select the new gender in the dropdown.

   - **Invoice Sending Method**

     Select the method for sending invoices to the contacts:

     - **Don't Send** – This contact does not receive invoices.
     - **Email** – Default. For sending to contact's Accounting notification email address.
     - **Print** – For sending via USPS or other delivery method.
     - **Print & Email** – For both emailing and USPS/other delivery method.

   - **Rating**

     Select the credit rating you want to change the contacts to in the dropdown.

   - **Sales Rep**

     Click . See Looking up users.

   - **Salutation**
     Select new terms of address for the contacts in the dropdown.

   - **Statement Sending Method**

     Select the method for sending statements to the contacts:

- **Don’t Send** – This contact does not receive statements.
- **Email** – Default. For sending to contact’s Accounting notification email address.
- **Print** – For sending via USPS or other delivery method.

5. Click **Next.**
6. In the **Update To** panel, choose one:
   - **All contacts**

     To change every listing in Contacts.
   - **All active contacts**

     To change only those listings for contacts that are still doing business with you.
   - **Specific contacts**

     Default. To select a custom set of contacts to update.

     1. Select a filter in the **Search By** dropdown:
        - **Firm Name**

          Default. To search for contacts who work at firms that have a common name, enter part of the name in **Search Criteria.**
        - **Firm No.**

          To search for contacts that work for one firm, enter the firm number in **Search Criteria.**
        - **Parent Firm**

          To search for contacts who work for firms that are part of a multi-company organization, click . See Looking up firms.
        - **Sales Rep**

          When bulk updating sales reps only

          To search for contacts by their assigned sales representative, click . See Looking up users.
     2. Click . MR9 displays all the contacts that meet the search criteria.
     3. Check the boxes of contacts to update.
7. Click **Update.** If you selected the All contacts option, an alert will appear asking if you mean to update every contact in your database. If so, click **Yes.**
8. MR9 updates the entries. Click **OK** in the operation successful popup that appears.

CAUTION: Update All means your entire contact database

Select the All contacts choice in the **Update To** panel only when you want to update the field in every contact in your database. *The Bulk Update function cannot be stopped while it is executing an update and you cannot undo or roll back an update.* Use Update All with caution. If you want to update all of the contacts in the **Results** grid in the **Update To** panel, check the box in the **Results** header to select them all then click **Update.**

Reference

- Contact
- Lists > Accounting
- Billing Rates
- Client Rep
- Lists > Contacts
- Sales Rep
- Firm
- Parent Firm
- Results pane

Step-by-step instructions

- Setting up Service Item Master
- Looking up users
- Looking up firms

Updating multiple locations at once

If you have a number of locations that need their location type changed, save time by changing all of the affected locations at once.

1. **Tools > Bulk Update**
2. In the Bulk Update window, select Locations in the **Entity** dropdown.
3. Select the field you want to update in the **Choose field to update** dropdown:
   - **Expeditor**

     To change who is designated as your expert on the locations.
   - **Location Type**

     Location types are categories of facilities where retrievable records are stored, e.g., Hospital, Courthouse, or School. (Location Types and default are set in Lists > Locations.)
   - **ROI Handled By**

     If the entity that handles the release of information (ROI) for a location is different from the location.
4. Selections in **Set value to** vary depending on the field you chose to update above. If you selected:
   - **Expeditor**

     Click . See Looking up users.
   - **Location Type**

     Select the category you want to change the locations to in the dropdown.
   - **ROI Handled By**

     Click . See Looking up locations.
5. Click **Next.**
6. In the **Update To** panel, choose one:
   - **All locations**

     To change every listing in Locations.
   - **All active locations**

     To change only those listings for locations that are still doing business with you.

- **Specific locations**

  Default. To select a custom set of locations to update.

  1. Select a filter in the **Search By** dropdown:

     - **City**

       Default. To search for locations in one city, enter part of the city name in **Search Criteria.**

     - **State**

       To search for locations in one state or multiple states, click . Then select states in the **Lookup State** panel. See Lookup panel.

  2. Click . MR9 displays all the locations that meet the search criteria.

  3. Check the boxes of locations to update.

7. Click **Update.** If you selected the All locations option, an alert will appear asking if you mean to update every location in your database. If so, click **Yes.**

8. MR9 updates the entries. Click **OK** in the operation successful popup that appears.

CAUTION: Update All means your entire location database
Select the All locations choice in the **Update To** panel only when you want to update the field in every location in your database. *The Bulk Update function cannot be stopped while it is executing an update and you cannot undo or roll back an update.* Use Update All with caution. If you want to update all of the locations in the **Results** grid in the **Update To** panel, check the box in the **Results** header to select them all then click **Update.**

Reference

- Locations
- Lists > Locations
- Lookup panel
- Results pane

Step-by-step instructions

- Looking up users
- Looking up locations

Managing tags

Use the Tag Manager to find tagged entities, email selected entities, print envelopes or labels for targeted mailings, and quickly add or remove tags from entities.

1. **Tools > Tag Manager**
2. In the Tag Manager's **Search By** pane, select an **Entity** category in the dropdown.
3. The other search filters will update depending on the **Entity** category selected. To:

- ## Find entities to tag
  - ### Firms

    Enter a partial/full name in **Firm Name** to search for specific firms.
  - ### Contacts

    Use either or both fields:
    - Enter a partial/full name in **Firm Name** to search for contacts at specific firms.
    - Enter a partial/full name in **Contact Name** to search for specific contacts.
  - ### Locations

    Enter a partial/full name in **Location Name** to search for specific locations.
- ## Find tagged entities

  All tags that were set up in the relevant list for the **Entity** category selected appear in the **Tag** dropdown automatically (see Customizing lists). Either:
  - Select the tag name in the dropdown.
  - Type a partial/full tag name in the field if the tag was manually entered in entities. See Organizing with tags.

4. Click . All entries that match the search criteria appear in the Tag Manager results grid. If you would like to view an entity's details, click its hyperlink.
5. Select the desired entries in the Tag Manager results grid by checking their boxes. Or check the box in the header to select all.
6. To:

- **Add a tag to selected entities**

  1. Click **Add Tag.**
  2. In the **Add Tag** popup, either:
     - Select a tag in the ***Tag** dropdown.
     - Enter a new tag.
  3. Click **Save.**

  TIP: Add tags to the dropdown for reuse

  If you enter a tag here manually, it is saved in the specific entity it was added to and does not appear in **Tag** dropdowns. Enter the tag in Setup > Lists > [specific entity] > Tag (see Customizing lists) so you can reuse it easily by simply selecting it in dropdowns. You also eliminate the chance of typos or alternative spellings — the tag will be consistent in all entities tagged with it — and the tag will be shared with the rest of your company.

- **Remove the tag from selected entities**

  Click **Remove Tag.** In the popup that appears, click **Yes.**

- **Email selected entities**

  For contacts and locations only

  Click **More > Send Email.** See Composing emails.

- **Print envelopes for selected entities**

  Click **More > Print Envelopes and Labels.** See Printing envelopes.

- **Print mailing labels for selected entities**

  Click **More > Print Envelopes and Labels.** See Printing labels.

- **Print/export results**

  See Exporting & printing results.

Reference

- Tags
- Entities
- Firms lists
- Contacts lists
- Locations lists

Step-by-step instructions

- Customizing lists
- Organizing with tags
- Composing emails
- Printing envelopes
- Printing labels
- Exporting & printing results

Creating/updating forms & letters

Edit default form templates and create new ones — either from scratch or by copying and updating an existing template. Import forms from other applications to use in MR9. Insert headers, footers, graphics, and tables. Add MR9 data fields. Format everything to match your needs and corporate culture. MR9 automatically saves your work at regular intervals. Any form templates you create or edits you make to templates are saved system wide and are available to all of your MR9 registered users.

1. Select the form category

1. **Tools > Form Templates**
2. Whether adding or editing a form, click the form type in the left pane of the Form Templates window that is the main category for the form.

   ### NOTE: Why selecting form type for new forms matters

   The form type selected determines which data fields are available to insert in the form and which function(s) the form is available in. (See Form Types and Groups.) You can change which form type/group a new form is in until you save the form. You can move a saved form template to another form type/group. See Moving forms to other types/groups.
3. MR9 displays all existing forms saved in the top level of the category in the results pane. If there are any subcategories (form groups) for the form type you selected, those appear under the main category in the left pane. Click one of those to see form templates in that form group or if you want to add a new form template to that subcategory.

2. Add/select form template

1. To:

   - ### Create a new form from scratch
     Click **New** in the Form Templates' header.
   - ### Create a new form from an existing form

     1. In the Form Templates window, click the form's:

        - **> View**
        - **> Edit**
        - Hyperlinked **Form Name**

2. In the View Form/Edit Form window, click **More > Copy & New.**

- ### Update a form

  In the Form Templates window, click the form's:

  - **> Edit**
  - **> View** or its hyperlinked **Form Name.** Then in the View Form window, click **Edit.**

- ### Delete a form

  1. In the Form Templates window, click the form's:

     - **> Delete**
     - **> View/Edit** or hyperlinked **Form Name.** Then in the View Form/Edit Form window, click **Delete.**

  2. Click **Yes** in the popup that appears.

TIP: Print out a copy before editing

If you like to work out your ideas on paper, or just need a printed copy of a form template, click **File > Print** in the View Form/Edit Form window to access your browser's print function in the form.

3. Enter information and formatting

1. If you are:

   - **Creating a new form (either from scratch or from an existing form)** – In the New Form window, enter a name in ***Form Name** *(required).* You can also select a different **Form Type/Form Group** where the template will be saved.

     #### NOTE: Merge data fields might not work in copied forms

     Because data fields are contextual, not all data fields work in all form types. If you change the **Form Type** for a form you copied from an existing form, check that the data fields in the form are included in the datasets available for the form's new form type. See Editing form Data Fields options.

   - **Updating an existing form** – In the Edit Form window, **Form Type** is uneditable, but you can select a different **Form Group** and change the ***Form Name.**

     #### TIP: Move a form from a subcategory to its main category

     If you want to move an existing form template from a form group to the form type

it is organized under, select the blank option in the **Form Group** dropdown.

2. In the New Form/Edit Form window, click a tab to access tools to customize the form. See Editing forms & letters.

   NOTE: Editing in some forms are restricted

   Since the government has stringent formatting requirements for their forms, you can't alter the formatting in certain federal subpoenas because that invalidates them. You can however update what kinds of data populates the data fields. See Modifying data maps.

4. ## Save

   In the New Form/Edit Form window, click **Save >**

   - **Save & Edit:** To save your work and continue updating the template.
   - **Save & Close:** If you have no more changes to make at this time.

   In addition to manual saves, MR9 automatically saves your work at regular intervals in Edit Form windows while you are working.

Reference

- Form Types and Groups

Step-by-step instructions

- Moving forms to other types/groups
- Editing forms & letters
- Editing form File options
- Editing form Home options
- Editing form Insert options
- Editing form Page Layout options
- Editing form View options
- Editing form Data Fields options
- Editing form Table Tools options
- Editing form Frame Formatting options
- Modifying data maps

Creating DYMO label templates

Before printing DYMO labels out of MR9, set up DYMO label templates that will automatically include the recipient's mailing address — plus your company logo and other information, if desired.

NOTE: DYMO software version required

Your DYMO label printer should be installed and working prior to attempting to print labels from within MR9. See Setting up for online label printing.

1. To create label templates, open your DYMO application:
   - If you have the discontinued DYMO Label Web Service already installed on your computer and want to create .label templates, see Creating .label templates.
   - If you have installed DYMO Connect, see Creating .dymo templates.
2. To upload your label templates to MR9, see Managing label templates.

Reference

- Labels
- DYMO

Step-by-step instructions

- Setting up for online label printing
- Creating .label templates
- Creating .dymo templates
- Managing label templates

Managing label templates

In addition to the included default label templates, you can add your own DYMO printer-compatible labels to use in MR9 and share with others in your company. You can download label templates to modify and create new templates. And you can delete labels you don't need anymore.

1. **Tools > Label Templates**
2. All of your company's label templates are listed in the Label Templates window.
3. To modify templates, check the box(es) of template(s) you want to modify.
4. Click **Download.**
5. Open the file(s) on your device and edit the template(s).
6. Save the template(s):

- **With a new name to add as a new template**

  1. In the Label Templates window, click **New >**
     - **Dymo Label (.label)** – If you are using DYMO Label Web Service to print labels. (This is discontinued software.)
     - **Dymo Label (.dymo)** – If you are using DYMO Connect to print labels.
  2. In the **New Dymo Labels** popup, drag and drop DYMO label files with the same extension (.label or .dymo) as you selected under **New** into the dotted area, or click in the area to select DYMO label files on your computer, then click **Open.** (To create your own label templates, see Creating DYMO label templates.)
  3. Click **Upload.**

- **With the same name to replace the existing template**

  You must delete the existing template before adding the replacement template.

  1. In the Label Templates window, check the template's box.
  2. Click **Delete.** Then click **Yes** in the popup.
  3. Follow the instructions above to upload the updated template as a new template.

Reference

- Labels
- DYMO

Step-by-step instructions

- Creating DYMO label templates
- Printing labels

Searching notes

Search for log notes by date, communication type, a word or phrase, or other parameters in the different MR9 Notes Logs.

1. **Tools > Notes Finder**
2. In the **Search By** pane, select the Notes Log category you want to search in the **Search In** dropdown:
   - **Contact Notes** – Default. Made in contact listings.
   - **Firm Notes** – Made in firm listings.
   - **Firm Collection Notes** – Made in firm listings' Collections pane.
   - **Invoice Notes** – Made in invoice listings.
   - **Location Notes** – Made in location listings.
   - **Order Notes** – Made in order listings.
   - **Order Party Notes** – Made in order party listings.
   - **Part Notes** – Made in part listings.
3. No specific filter is required but you must use at least one of the search filters with the selected Notes Log category:
   - **Entered Date From/Entered Date To**

     The date or date range for when notes were made. See Date Navigator.
   - **Entered By**

     To restrict the search to notes made by a specific MR9 user, click . See Lookup panel.
   - **A word or phrase in Notes**

     Partial/full word or phrase. For example search Firm Collection Notes for the word, "promise," to find notes with clients' promised actions.
   - **Notes Type or Action Type**

     Default is ALL. Works in conjunction with the particular Notes table being searched. (Notes and Action Types are set in their related Lists in Setup. See Customizing lists.) To restrict the search to particular categories of documented activities, click . See Lookup panel.

- **Exclude Cancelled Notes**

  Default is Yes. Slide to No to include all notes.

4. Click . All notes that match the search criteria appear in the grid with each note's identifying information above the note content, most recent notes listed first. The column headers are contextual and change depending on which Notes table you searched.
5. Sort notes by column by clicking a column header. See Sorting rows.
6. To view more information associated with a note, click its hyperlink.
7. To print/export notes, see Exporting & printing results.

Reference

- Notes Logs
- Date Navigator
- User
- Lookup panel
- Lists > Contacts
- Lists > Firms
- Lists > Invoice
- Lists > Locations
- Lists > Orders
- Lists > Parts

Step-by-step instructions

- Making entries in notes logs
- Updating contacts
- Updating firms
- Recording collections efforts
- Adding billing information to invoices
- Updating locations
- Updating orders
- Updating parties
- Updating parts
- Customizing lists
- Sorting rows
- Exporting & printing results

Tracking inhouse and online repository access

In addition to complying with general security rules for business applications, tracking repository access is useful to see which clients are using your MR Connect, and which files they are downloading. You must set up MR9 for tracking first (see note below) to use Repository Download Log.

1. **Tools > Repository Download Log**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:
   - **Accessed By**
     - Contact – Default. To track online repository access by clients.
     - User – To track inhouse repository access.

     To view a single person's download activity, click to select the person. See Lookup panel.
   - **Access Date From/Access Date To**

     Enter a date or date range for which you want to see download activity. See Date Navigator.
   - **File Name**

     Enter part of a file name to view download activity for files that include that name.
   - **File Type**

     Default is ALL. To restrict the search to particular type(s), click . See Lookup panel. (File Types are set in Lists > Repository.)
3. Click . All entries that match the search criteria appear in the grid. You can view details about a person or file by clicking their hyperlink.
4. To share the log with others, export and save the results by clicking and selecting an export file type. See Exporting & printing results.

IMPORTANT: Set up MR9 to record download activity

To start the logging process, go to System Preferences > Production and select **Repository.** In the **Production – Repository** panel, click **Edit,** then set both **Logging download activity for...** sliders to Yes to have MR9 record usage of repository files. Click **Save.**

TIP: Help contacts track their own usage

When you slide **Logging download activity for contacts** to Yes in System Preferences

> Production, your contacts can also see their download activity in MR Connect's Repository. A Reviewed column will be included in their Repository results grid, and any file they download will record the date and time in that column, so your clients can see at a glance if they have downloaded a file or not.

Reference

- Contact
- MR Connect
- User
- Lookup panel
- Date Navigator
- Lists > Repository
- System Preferences > Production

Step-by-step instructions

- Exporting & printing results

Viewing email logs

MR9 automatically maintains a log of most emails sent through the system. You can view lists of emails sent and look up details about each email sent. The email logs are your paper trail of correspondence sent from MR9 and cannot be edited.

1. **Tools > Email Log**
2. In the **Search By** pane of the Email Log window:
   - **Email Type**

     Defaults to Collection Letter. Select the category of email you want to view in the dropdown.
   - **Recipient Email**

     To view emails associated with one email address only, click >
     - **Contact –** See Looking up contacts.
     - **User –**See Looking up users.
   - **Sent Date From/Sent Date To**

     Click in these fields to enter a date or date range in Date Navigator.
   - **Order No.**

     Restrict the search to a single order by entering its order number.
   - **Invoice No.**

     Restrict the search to a single invoice by entering its invoice number.
3. Click . MR9 displays all of the log entries that match the search criteria.
4. To view the sent email's details, click its hyperlinked **Log No.**
5. In the View Email Log window, the email's **Subject** and **Message** are displayed along with other information about the email — such as recipients, sender, and when sent — plus any attachments. You cannot edit the information in this window but you can download attachments by clicking their hyperlink.

NOTE: Not all emails are logged by MR9

The only emails that are included in the Email Log are related to:

- Collection Letters
- Forms
- Invoices

- Payment Receipts
- Repository Notifications
- Statements
- Worksheets

IMPORTANT: Attachments are saved along with emails

When MR9 saves emails in the Email Log, all attachment files are stored as well and add to your repository size. This could result in addition repository storage charges. In System Preferences > Tools > Email Log, select the email types you consider necessary to maintain a record of and how long you want them stored in the system.

Reference

- Date Navigator
- Collection Letters
- Send Forms
- Invoices
- Send Payment Receipts
- Repository Notifications
- Statements
- Notify Runners
- Email Log preferences

Step-by-step instructions

- Looking up contacts
- Looking up users

Viewing merge histories

When you merge a firm/contact/location into another one MR9 records the event in the merged-into entity's Notes Log. Use this function to find merged entities in a specific date range.

1. **Tools > Merge History**
2. In the **Search By** pane of the Merge History window:
   - **Object**

     Select the category of merge history you want to view in the dropdown:
     - **Contact** – To see all contacts merged in the date range below.
     - **Firm** – Default. To see all firms merged in the date range below.
     - **Location** – To see all locations merged in the date range below.
   - ***Merge Date From/*Merge Date To**

     Required. Default range is the past 30 days. Click in these fields to update the date range in Date Navigator.
3. Click . MR9 displays all of the merges that match the search criteria.
4. To view/update an entry's listing click its hyperlinked **Merge To** name.

TIP: Search Notes Logs for merged entities

Since merges are recorded in the affected entities' Notes Logs you can also use the Notes Finder to find merged entities. In Notes Finder, enter the word "merged" in the **A word or phrase in Notes** field of Contact Notes, Firm Notes, or Location Notes searches. See Searching notes.

Reference

- Date Navigator
- Notes Finder

Step-by-step instructions

- Updating contacts
- Searching notes

Creating custom reports

If MR9's search critera do not include filters you want, make your own simple reports using any field(s) in a single table, a table subset, or one of the preset table combinations. For example if you want to see all contacts in your MR9 database from several cities, specify search conditions, and MR9 constructs the proper SQL statements to return the results from the Contacts table. You can export the report to save it, and you can save the query itself to use again later.

Instead of starting from scratch each time to create queries, you can use an existing query as a base, either one saved in your company's MR9 database or one published in the Query Gallery. Modify as needed and save as a new query to use again.

1. **Tools > Query Maker**
2. To:
   - **Use a saved query –** See Using previously-saved queries.
   - **Use a published query –** See Using published queries.
   - **Create a report from scratch –** In the **Data Set** dropdown of the Query Maker window, select the table, table subset, or preset table combination that contains the fields you want to include in a report.

TIP: How to pick a table option

MR9 data sets are derived from tables in your MR9 database. Depending on what you want to view, choose:

- **A single table** – If you want to use fields that are in one table, such as Contacts. Single table data sets are labeled with a single whole word, such as Contacts or Firms.
- **A subset of a table** – Since there are so many fields in a single table, MR9 has some data sets that consist of smaller focused sets of fields, such as the ContactsPreferServices data set which includes fields for creating reports about contacts' preferred services. Table subsets are labeled with a string of initial cap words with no space between the words, such as ContactsPreferServices or FirmsRetainers.
- **A combination of tables** – Some data sets include fields from 2 or more tables, such as Firms+Contacts which includes fields from both the Firms table and the Contacts table. Table combinations are labeled with their single word table names joined with a plus (+) sign, such as Firms+Contacts or Invoices+Orders+Parts. With the Firms+Contacts View, you can create a report listing all the contacts with the firm address instead of their home addresses, for example. With the Invoices+Orders+Parts View, you can run a query for invoices that includes associated order.part numbers, for example.

3. All fields in the table are selected in the **Columns** pane to appear as columns in your report by default. If you do not want all fields to appear in your report, either:
    - Uncheck fields one at a time.
    - Uncheck the **Show** box, then check the boxes for only the fields you want to appear.
4. In the **Conditions** pane, start a query by selecting a data field in the **Column** dropdown.
5. Choose a filter in the **Operator** dropdown.
6. Enter the unique condition you want to use with the operator in **Condition.**
7. Click **Execute.** MR9 returns the results of your query. To:
    - **Start over,** click **Clear.**
    - **Return more targeted results,** see Setting multiple query conditions.
    - **Export your report** to *Excel* or as a generic CSV (comma separated values) file, see Exporting & printing results.
    - **Save your query** to re-use later, see Saving queries.

Reference

- Database
- SQL
- Operators
- Query Gallery

Step-by-step instructions

- Setting multiple query conditions
- Exporting & printing results
- Saving queries
- Using previously-saved queries
- Using published queries

Preparing to use *QuickBooks Desktop* with MR9

Before you can import MR9 data into *QuickBooks Desktop,* you must enter your *QuickBooks* information in System Preferences, download the QuickBooks Gateway web-based proxy from *QuickBooks,* and set it up to enable secure remote access to your *QuickBooks.*

NOTE: QuickBooks Online has different set-up

If you subscribe to *QuickBooks Online* version, refer to the instructions in QuickBook preferences to set up your *QuickBooks* to work with MR9.

TIP: Increase QuickBooks Integrator's performance

Always launch *QuickBooks* before using QuickBooks Integrator. This makes the import process over 300% faster than without launching *QuickBooks* first.

1. Download and install the QuickBooks Gateway tool from: https://www.cdata.com/download/getfile.aspx?file=free/ABXF-A/setup.exe&name=CData%20QuickBooks%20Gateway&tag=Download-QB-Gateway
2. After downloading, start the .exe file on the machine where *QuickBooks* is installed.
3. In the QuickBooks Gateway Setup screen, click **Next.**
4. In the License Agreement screen, click **I Agree.**
5. In the Choose Install Location screen, click **Next.**
6. In the Choose Components screen, click **Next.**
7. In the Choose Start Menu Folder screen, click **Next.**
8. In the Installation Options screen, click **Next.**
9. In the Ready To Install screen, click **Install.**
10. When the installation completed successfully screen appears, click **Finish.**
11. Start *QuickBooks,* then open the Company File you want to connect to in QuickBooks using an administrator account in single-user mode.
12. Open QuickBooks Gateway from the system tray and on the **Users** tab, click **Add.**
13. In the Add User screen, enter **User** and **Password.**

NOTE: QuickBooks Gateway users are separate from *QuickBooks* users

The QuickBooks Gateway does not use these User and Password properties to access *QuickBooks;* the User and Password properties authenticate the user to QuickBooks Gateway. Authentication to *QuickBooks* is handled based on the Application Name property.

14. Select the level of access in the Data Access menu. By default *QuickBooks* connects to the currently open company file. If you want to access *QuickBooks* when *QuickBooks* is not running (although this will be signicantly slower than with *QuickBooks* open), specify a path to the company file you want to access.

15. When you first connect, a dialog will appear in *QuickBooks* prompting you to authorize the application. In the Authorize Now? window, click **Yes.**

16. In the Application Authorization window, click **OK.**

17. In the QuickBooks – Application Certificate screen, change the following:

    - Choose **Yes, always; allow access even if QuickBooks is not running,** then choose **Login as** account.

    - Check **Allow this application to access personal data such as Social Security Numbers and customer credit card information.**

18. Click **Continue…**

19. In the Access Confirmation screen, click **Done.**

20. In the Authorization Successful window, click **Yes.**

21. By default, QuickBooks Gateway uses the port number 8166. If this port is used by another application, enter a different number in **Port** in the **Connection Settings** section on the **Advanced** tab in the QuickBooks Gateway screen.

22. Also on the **Advanced** tab, check the **Enable Persistent Connection** box in the **Connection Settings** section. Normally the remote connection closes between requests, which can slow down information importing and cause errors when you have multiple, small requests, such as importing data from MR9. If you check this option, you can reuse the same connection to *QuickBooks* for all of the imported MR9 data during a single session, which will save time between requests made in short succession.

23. In your firewall, allow QuickBooks IP and the port number to be accessed from outside.

Reference

- QuickBooks preferences

Step-by-step instructions

- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Importing checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Firms

Firms are entities you do business with — such as law firms, vendors, insurance companies, corporate clients, and courts.

Step-by-step instructions

- Adding firms to MR9
- Updating firms
- Searching firms
- Looking up firms

Contacts

Contacts are individuals who work for firms you do business with — such as attorneys, paralegals, secretaries, legal assistants, claim adjusters, and court clerks.

Reference

- Firms
- Seniors

Step-by-step instructions

- Adding contacts to MR9
- Updating contacts
- Searching contacts
- Looking up contacts

Locations

Locations (custodians) are places where retrievable records are stored or subpoenas are otherwise served, such as medical facilities, schools, or businesses.

Step-by-step instructions

- Adding locations to MR9
- Updating locations
- Searching locations
- Looking up locations

Business Units

Business Units (BU) are your company's revenue centers or any entity in your business that you want to track separately, such as branch offices, other companies you own, affiliates, and profit-sharing operations.

IMPORTANT: MR9 requires at least one business unit

Before using MR9 you must set up at least one BU so you can process receivables.

Reference

- Accounts receivable

Step-by-step instructions

- Setting up business units
- Updating business units

Firms

Firms are companies you do business with, such as law firms, or they are a third party that pays you, e.g., an insurance company.

For how to set up lists, see Customizing lists.

- **Account Status**

  Designation specifying the state of accounting affairs or credit standing, e.g., In Collection or COD (Cash on Delivery). Used in collections.

- **Class**

  Designation specifying the quality or ranking of a law firm. Used in marketing.

- **Collection Action Type**

  Designation specifying what action has been taken or should be taken to collect overdue funds from client firms, such as COD Letter Sent or Send Demand Letter.

- **Firm Type**

  Designation specifying industry, e.g., Law Firm or Insurance Company.

- **Notes Type**

  Categories of notes, e.g., Collection or Marketing, for classifying what a firm note documents. Use as a filter when searching Firm Notes Logs.

- **Rating**

  Designation specifying your credit rating of a firm, e.g., No Deposit Required or Bad Debt.

- **Source**

  Designation specifying how the client heard of your company, e.g., promotion or web. Used in marketing.

- **Tag**

  Categories to organize firms. You can use any words or phrases as a tag, e.g., Top 10.

Reference

- Firms

- Notes Log
- Tags

Step-by-step instructions

- Customizing lists
- Adding firms to MR9
- Recording collections efforts
- Entering firm marketing information
- Organizing with tags

Contacts

Contacts are people who work at firms that place orders for records and subpoena services with you.

For how to set up lists, see Customizing lists.

- **Contact Type**

  Designation specifying profession, e.g., Attorney or Paralegal.

- **Gender**

  Gender classifications, e.g., Male or Female, used in individual contacts.

- **Notes Type**

  Categories of notes, e.g., Sales or Marketing, for classifying what a contact note documents. Use as a filter when searching Contact Notes Logs.

- **Rating**

  Designation specifying your credit rating of an individual, such as Preferred or Bad Debt.

- **Salutation**

  Forms of address used in letters or messages for contacts, e.g., Mr. or Ms.

- **Tag**

  Categories to organize contacts. You can use any words or phrases as a tag, e.g., Top 10.

- **Title**

  Designation specifying job title or position, e.g., Owner or Managing Partner.

- **Turnaround Type**

  Designation specifying how fast the client wants a completed product. Contacts' turnaround time preferences for services appear in contacts' Preferred Services.

Reference

- Contacts

- Notes Log
- Tags

Step-by-step instructions

- Customizing lists
- Adding contacts to MR9
- Organizing with tags
- Adding standing requests

Locations

Using a database of locations/custodians of records makes it faster and easier to designate where records are to be retrieved or are otherwise served.

For how to set up lists, see Customizing lists.

- **Department**

  Categories of specialized divisions in a location, e.g., Pathology or Radiology.

- **Doctor Specialty**

  Designations specifying an area of expertise or unique skill: e.g. Cardiology or Oncology.

- **Doctor Title**

  Categories of professional forms of address, e.g., Dr. or M.D.

- **Location Type**

  Categories of facilities where orders reside, e.g., Hospital, Doctor's Office, or Pharmacy.

- **Notes Type**

  Categories of notes, e.g., Call Made to Client or Mail Sent to Custodian, for classifying what a location note documents. Use as a filter when searching Location Notes Logs.

- **Serve By**

  Designations specifying how subpoenas will be served to locations, e.g., Mail or Hand.

- **Tag**

  Categories to organize locations. You can use any words or phrases as a tag, e.g., Top 10.

Reference

- Locations
- Notes Log
- Tags

Step-by-step instructions

- Customizing lists
- Organizing with tags
- Adding locations to MR9
- Entering order locations

Entities preferences

System-wide preferences and defaults for Entities functions.

- **Contacts**

  Defaults for autofilling names.

- **Firms**

  Defaults for invoice options, such as late charges and past due days.

Reference

- Contacts
- Firms

Step-by-step instructions

- Customizing global preferences

Adding firms to MR9

You can add firms to your MR9 database in the Entities module, import them from other applications, or on the fly in orders.

The only required firm information *(designated by * in MR)* you must enter before saving a new firm is the firm's name. You can enter other information about the firm at any time.

1. Start a new firm

- ### From scratch

  1. **Entities > Firms**
  2. Check that the firm does not already exist in your MR9 database. See Searching firms.
  3. If the firm doesn't appear in your search, click **New** in the Firms window.

- ### From another application

  If you have an existing database of firms in another application, you can import the data into MR9 via an Excel spreadsheet. See Importing entities from other systems.

- ### Starting a new order

  1. **Orders > Orders**
  2. In the Orders window, click **New**.
  3. In the New Order window, the **Lookup Firm** panel appears automatically. Click **New.**

- ### Within an order

  You can change an existing scheduling or ordered by firm to a new firm, or add a new firm as a party to the order.

  1. **Orders > Orders**
  2. Find order. See Searching orders.
  3. To:
     - **Change scheduling firm** – In **General** pane, click ***Scheduling Firm** ▽ **> Lookup Firm** *(required).*
     - **Change ordered by firm** – In **General** pane, click **Ordered By Firm** ▽ **> Lookup Firm.**

- **Add new firm as a party** – In the **Parties** pane, click .

4. In the **Lookup Firm** panel, click **New.**

- **When creating a new contact**

  Contacts must be tied to firms in MR9. If a contact's firm is not in the database, you can add it on the fly.

  1. **Entities > Contacts**
  2. Click **New.**
  3. In the New Contact window, the **Lookup Firm** panel automatically opens. Click **New.**

2. Enter required information

In the New Firm window, enter the firm's name in ***Firm Name** *(required)*. (If creating new firm within an order, you will also be required to enter at least one contact into the firm. See Adding contacts to MR9.)

3. Enter optional information

You can enter information now or at any time after saving:

- **General**

  To enter basic firm information, including contact information and important warnings, see Entering general firm information.

- **Additional**

  To enter invoice and statement details for your production/billing departments, see Entering additional firm information.

- **Addresses**

  To enter designated billing and shipping addresses for the firm, see Entering firm addresses.

- **Marketing**

  To specify what type of firm this is for marketing and billing purposes, see Entering firm marketing information.

- **Collections**

  Initially, you can designate which user is responsible for collecting this firm's overdue payments (see Looking up users), and the actionable financial status of this firm, such as COD or bankrupt. (Account statuses and default are set in Lists > Firms.)

  After saving the firm, you can enter and track retainers (see Entering retainers), and track collection efforts and results (see Recording collections efforts).

4. **Save firm**

   Click **Save >**

   - **Save & Edit:** To enter more firm information. The window changes to Edit Firm, adds additional panes, and scrolls to Notification Email and Tags panes. See Updating firms.
   - **Save & Close:** If you have no more information to add at this time.

Reference

- Microsoft Excel
- Bulk Import
- COD
- Lists > Firms
- Lookup panel
- Retainer

Step-by-step instructions

- Searching firms
- Importing entities from other systems
- Searching orders
- Searching in MR9
- Adding contacts to MR9
- Entering general firm information
- Entering additional firm information
- Entering firm addresses
- Entering firm marketing information
- Looking up users
- Entering retainers
- Recording collections efforts

  Updating firms

Updating firms

When adding a firm to your MR9 database or at any time later, you can view, add to, or edit the firm's information.

1. **Find the firm**

   Access a firm to update in one of the following ways:

   - **By searching**
     Entities > Firms (see Searching firms).
   - **As a party to an order**
     1. Click the hyperlinked contact within the **Parties** pane in an order (see Adding parties).
     2. In the **General** pane of:
        - **View Party** panel, click the **Firm** field's .
        - **Edit Party** panel, click the ***Firm** field's **> View Firm.**
     3. Click **Edit** in the **View Firm** panel.
   - **In an order**
     1. In the **Ordering Client** pane of:
        - View Order window, click the **Scheduling Firm** or **Ordering Firm** field's .
        - Edit Order window, click **> View Firm** next to **Scheduling Firm** or ***Ordering Firm** *(required).*
     2. Click **Edit** in the **View Firm** panel.
   - **In a contact**
     1. In the **Firm** pane of:
        - View Contact window, click the **Firm** field's .
        - Edit Contact window, click the **Firm** field's **> View Firm** or **Edit Firm.**
     2. Click **Edit** in the **View Firm** panel.
   - **Sold To Firm/Bill To Firm/Payer on an invoice**
     1. In a View Invoice/Edit Invoice window, click the **Sold To Firm/Bill To**

Firm/Payer field's in the top pane.

(In a Turn In-Order# window's **Edit Invoice** panel, click the ***Sold To Firm/Bill To Firm** field's ▽ **> View Firm.** See Adding general billing information to invoices.)

2. Click **Edit** in the **View Firm** panel.

- **In a results grid**

  Marketing Inquiry

  Click the firm's:

  - **> Edit**
  - Hyperlinked name. Then click **Edit** in the **View Firm** panel.

- **In a central repository file**

  In the View Repository/Edit Repository window, click the **Firm** field's . Then click **Edit** in the **View Firm** panel. See Viewing & updating repository file details.

2. Add/update contacts

1. Click **Contacts > All Contacts.**
2. In the **All Contacts** panel, to:
   - **Add a contact:** Click **New.** See Adding contacts to MR9.
   - **Update a contact:** Click the contact's hyperlinked name. See Updating contacts.

3. View the firm's financial & order trends

Click **Account Overview** in the View Firm/Edit Firm window. See Viewing entity activity.

4. Update firm information

1. If not already in the Edit Firm window/panel, click **Edit.**
2. Within an Edit Firm window, you can enter or update any information you entered, except notes entered in the Notes Log (which can only be canceled, see Canceling notes). Enter text or make selections:
   - **General**

     To enter basic firm information, including contact information and important warnings, see Entering general firm information.

- **Additional**

  To enter invoice and statement details for your production/billing departments, see Entering additional firm information.

- **Addresses**

  To enter designated billing and shipping addresses for the firm, see Entering firm addresses.

- **Notification Email**

  To enter company email addresses and designate them to receive specific types of emails, such as order or accounting emails, see Managing notification emails.

- **Tags**

  Tags mark firm as part of specific groups, which you can use for different purposes, such as monitoring or marketing. See Organizing with tags.

- **Preferred Services**

  Standing requests/preferred services the firm has for orders with your company. See Adding standing requests.

- **Marketing**

  Category of firm for marketing and billing purposes. See Entering firm marketing information.

- **Collections**

  - **To track collection efforts and results,** see Recording collections efforts.
  - **To enter and track retainers,** see Entering retainers.

- **Repository**

  Files related to the firm in your MR9 database. See Uploading files to a repository.

- **Notes Log**

  Notes about this firm for internal purposes. See Making entries in notes logs, Managing notes logs, and Canceling notes.

3. Click **Save >**

   - **Save & Edit:** To save your work and continue updating firm information.
   - **Save & Close:** If you have no more information to add at this time.

TIP: No longer need a firm?
You can delete it or merge it into another firm, saving its historical data. See Removing entities

Reference

- Sold To vs. Bill To
- Marketing Inquiry
- Notes Log
- Tags
- Lists > Firms
- Retainer

Step-by-step instructions

- Adding firms to MR9
- Searching firms
- Adding general billing information to invoices
- Viewing & updating repository file details
- Adding contacts to MR9
- Updating contacts
- Viewing entity activity
- Adding parties
- Entering general firm information
- Entering additional firm information
- Managing notification emails
- Organizing with tags
- Adding standing requests
- Entering firm marketing information
- Recording collections efforts
- Entering retainers
- Uploading files to a repository
- Making entries in notes logs
- Managing notes logs
- Canceling notes
- Removing entities

Adding contacts to MR9

You can add contacts to your MR9 database in advance, import them from other applications, or on the fly in firms, orders, and invoices. Contacts must be tied to a firm in MR9, and you can add firms on the fly too.

The only required contact information *(designated by * in MR)* you must enter before saving a new contact is the firm the work for and the contact's name. You can enter other information about the contact at any time.

1. Start a new contact

- **From scratch**

  1. **Entities > Contacts**
  2. Click **New.**
  3. In the New Contact window, the **Lookup Firm** panel automatically opens. Find and select the contact's firm *(required).* See Looking up firms. If the firm does not exist in your database, click **New** in the Lookup Firm window. (See Adding firms to MR9.)

- **From an existing contact**

  In a View Contact/Edit Contact window, click **More > Copy & New.** Contact will automatically include firm information.

- **From another application**

  If you have an existing database of contacts in another application, you can import the data into MR9 via an Excel spreadsheet. See Importing entities from other systems.

- **Within a firm**

  Contact will automatically include firm information.

  1. In a View Firm/Edit Firm window, click **Contacts > All Contacts.**
  2. All active contacts for the firm are listed in the **Contacts** panel by default.
     - Click **Show Inactive** to see all contacts for the firm that have been entered into MR. This way you can check that the contact has not been entered before.
     - Click **New** to add a contact.

- ### Within an order

  There are several areas in an order to enter contacts. Select the firm first in each instance, then the contact. The contact will automatically include its firm information.

  - ### General

    In an Edit Order window's **General** pane with the related firm already selected, you can add a new contact to the firm by clicking:

    - ***Scheduling Contact** ▽ **> New Contact** *(required)*
    - **Ordered By Contact** ⊞ or **Ordered By Contact** ▽ **> New Contact**

  - ### Parties

    1. In an Edit Order window's **Parties** pane, click:

       - **A hyperlinked contact** — To change the contact to a new contact at an existing party. (You cannot change the Scheduling Contact in the **Parties** pane. You must change it in the **General** pane above.)
       - ⊞ — To add a new contact to a new party to the order. See Looking up firms, Adding firms to MR9.

    2. In the **Edit Party/New Party** panel, click ***Contact** ▽ **> New Contact** *(required)*.

- ### Within an invoice

  - In a New Invoice window's **General** pane, click ***Sold To Contact** ⊞ *(required)* or **Bill To Contact** ⊞**.**
  - In an Edit Invoice window's **General** pane, click ***Sold To Contact** ▽ **> New Contact** *(required)* or **Bill To Contact** ⊞**.**

2. Enter required information

Other than the contact's firm, you must enter the contact's name. In the New Contact window's **General** pane, you can enter the contact's full name 3 ways:

- ### Automatically

  Set up preferences for Autofill in System Preferences > Entities > Contacts first.

  1. Enter contact's given name **(First Name),** middle name or initial **(Mi.),** family name **(Last Name),** and title **(Salutation).**
  2. Depending on what options you included in System Preferences, the ***Full Name** field will automatically populate with the contact's name. You can edit the full name if desired.

- **With options**

  By entering parts of the contact's name in the name fields, MR9 creates a dropdown of naming options for the ***Full Name** field.

  1. Enter the contact's given name in **First Name,** middle name or initial in **Mi.,** family name in **Last Name,** and title in **Salutation.**
  2. Click ▾ next to ***Full Name** field and select one of the variations of the contact's name in the dropdown *(required)*.

- **Without options**

  Type the contact's name exactly as you want it to appear in MR9 in ***Full Name** *(required)*.

TIP: Use the separate name fields for more search options

If you enter contact names in the separate name fields instead of only as a full name, you can use the **First Name** or **Last Name** filters to limit results when searching for contacts. See Searching contacts.

3. ## Enter optional information

You can enter information now or at any time after saving:

- **Firm**

  (If you are unable to edit firm information through the contact, use **Entities > Firms** instead to find and update the firm. See Searching firms.)

  - **To change the firm,** click ***Firm** field's ▽... **> Lookup Firm** (only available before saving a new contact from scratch or from an existing contact).
  - **To update the firm,** click **Firm** field's ▽... **> Edit Firm** (only available after saving the contact). See Updating firms.

- **General**

  To enter basic contact information and important warnings, see Entering general contact information.

- **Additional**

  To enter user credentials for online and miscellaneous information, see Entering additional contact information.

- **Marketing**

  To enter personal information about the contact, plus marketing and billing information, see Entering contact marketing information.

4. **Save contact**

   Click **Save >**

   - **Save & Edit:** To enter more contact information. The window changes to Edit Contact, adds additional panes, and scrolls to **Notification Email** and **Tags** panes. See Updating contacts.
   - **Save & Close:** If you have no more information to add at this time.

NOTE: Moving contacts to different firms

Once you save a contact, you cannot change which firm the contact belongs to. If the contact moves to another firm, slide to No in the **Active** slider in the current entry so they no longer appear in the firm's list of contacts, and enter them as a contact in their new firm. You can preserve some of their historical data by merging the existing contact into the new contact at the new firm.

Reference

- Microsoft Excel
- Bulk Import
- Contacts preferences
- Sold To vs. Bill To

Step-by-step instructions

- Looking up firms
- Adding firms to MR9
- Importing entities from other systems
- Searching contacts
- Searching firms
- Updating firms
- Entering general contact information
- Entering additional contact information
- Entering contact marketing information
- Updating contacts
- Merging data

Updating contacts

When adding a contact to your MR9 database or at any time later, you can add to or edit the contact's information.

1. **Find the contact**

   Access a contact to update in one of the following ways:

   - **By searching**

     Entities > Contacts See Searching contacts.

   - **Within a firm**

     1. Click **Contacts** in a View Firm/Edit Firm window.
     2. All the firm's contacts appear in the **Contacts** panel. Click the hyperlinked contact.
     3. Click **Edit** in the **View Contact** panel.

   - **Scheduling/ordering contact for an order**

     - In a View Order window, click the ***Scheduling Contact/Ordered By Contact** field's in the **General** pane. Then click **Edit** in the **View Contact** panel.
     - In an Edit Order window, click the ***Scheduling Contact/Ordered By Contact** field's **> View Contact** in the **General** pane. Then click **Edit** in the **View Contact** panel.

   - **As a party to an order**

     1. In an Edit Order window, click the hyperlinked contact in the **Parties** pane.
     2. Click ***Contact** field's **> View Contact** in the **Edit Party** panel. *(If the contact is the ordering party, this option is grayed out.)*
     3. Click **Edit** in the **View Contact** panel.

   - **Sold To/Bill To contact on an invoice**

     In a View Invoice/Edit Invoice window, click the **Sold To Contact/Bill To Contact** field's in the **General** pane. Then click **Edit** in the **View Contact** panel.

   - **Ship To contact on a label**

     In the **FedEx/UPS Shipping Label** panel, click the **Sold To Contact/Bill To Contact** field's . Then click **Edit** in the **View Contact** panel.

- **In a results grid**

  Anniversary Inquiry, *Marketing Inquiry*

  Click the contact's:

  - **> Edit**
  - Hyperlinked name. Then click **Edit** in the **View Contact** panel.

- **In a central repository file**

  In the View Repository/Edit Repository window, click the **Contact** field's . Then click **Edit** in the **View Contact** panel. See Viewing & updating repository file details.

2. View the contact's financial & order trends

Click **Account Overview** in the View Contact/Edit Contact window. See Viewing entity activity.

3. Update information

1. Within an Edit Contact window, you can enter or update any information you entered, except notes entered in the Notes Log (which can only be canceled, see Canceling notes):

   - **General**

     Basic contact information and important warnings. See Entering general contact information.

   - **Additional**

     To enter user credentials for online and miscellaneous information, see Entering additional contact information.

   - **Notification Email**

     To manage which email addresses receive order, accounting, or repository upload emails for this contact, see Managing notification emails.

     TIP: Quickly remove inactive contacts from future notification emails

     If a contact has left their firm, slide to No in the **Active** slider in the **General** pane of their listing. When you click **Save,** a popup will ask if you want to delete their email address from notification emails. Click **Yes,** and the contact will be removed from any future automatic notification emails.

   - **Tags**

     Tags mark firm as part of specific groups, which you can use for different purposes, such as monitoring or marketing. See Organizing with tags.

- **Grant Access To**

  Contact's seniors, i.e., contacts who can access this contact's MR Connect activities. See Granting access.

- **Have Access To**

  Contacts this contact is senior to, i.e., contacts whose MR Connect activities this contact can access. See Granting access.

- **Marketing**

  Personal information about the contact, plus marketing and billing information. See Entering contact marketing information.

- **Preferred Services**

  Standing requests/preferred services the firm has for orders with your company. See Adding standing requests.

- **Anniversaries**

  Contact's birthday, wedding anniversary, and other important dates. MR9 will automatically remind you of an upcoming event within a set number of days. See Remembering important client dates.

- **Award Points**

  If you reward contacts with points for booking with you, see Managing contacts' award points.

- **Repository**

  Files related to the contact in your MR9 database. See Uploading files to a repository.

- **Notes Log**

  Notes about this contact for internal reference. See Making entries in notes logs, Managing notes logs, and Canceling notes.

2. Click **Save >**

   - **Save & Edit:** To save your work and continue updating contact information.
   - **Save & Close:** If you have no more information to add at this time.

TIP: No longer need a contact?
You can delete it or merge it into another contact, saving its historical data. See Removing entities.

Reference

- Sold To vs. Bill To
- Anniversary Inquiry

- Marketing Inquiry
- Notes Log
- MR Connect
- Tags
- Senior
- Award Points

Step-by-step instructions

- Adding contacts to MR9
- Searching contacts
- Looking up contacts
- Viewing & updating repository file details
- Viewing entity activity
- Entering general contact information
- Entering additional contact information
- Managing notification emails
- Organizing with tags
- Granting access
- Entering contact marketing information
- Adding standing requests
- Remembering important client dates
- Managing contacts' award points
- Uploading files to a repository
- Making entries in notes logs
- Managing notes logs
- Canceling notes
- Removing entities

Adding locations to MR9

You can add locations to MR9 in the Entities module or on the fly in orders.

The only required location information *(designated by * in MR)* you must enter before saving a new location is the location's name. You can enter other information about the location at any time.

1. Start a new location

- **From scratch**
  1. **Entities > Locations**
  2. Check that the location does not already exist in your MR9 database. See Searching locations.
  3. If the location doesn't appear in your search, click **New** in the Locations window.
- **Within an order**
  1. **Orders > Orders**
  2. Find order. See Searching in MR9.
  3. Click **Edit** in the View Order window.
  4. In Edit Order window, scroll or jump to **Order Location** pane.
  5. Select Location in **Location Type** dropdown.
  6. Click **Location** field's . (If you are changing from an existing location, click > **Lookup Location.)**
  7. In the **Lookup Location** panel, click **New.**

2. Enter required information

In the New Location window, enter the location's name in ***Location Name** *(required)*.

3. Enter optional information

You can enter information now or at any time after saving:

- **General**
  To enter basic location information, including contact information and important warnings, see Entering general location information.

- **Additional**

  To enter information about records pickup/subpoena delivery, see Entering additional location information.

- **Doctor Info**

  If location is a doctor's office or similar, enter information about the doctor. See Entering information about doctors.

4. ## Save location

   Click **Save >**

   - **Save & Edit:** To enter more location information. The window changes to Edit Location, adds additional panes, and scrolls to **Notification** and **Tags** panes. See Updating locations.
   - **Save & Close:** If you have no more information to add at this time.

Reference

- Lookup panel

Step-by-step instructions

- Searching locations
- Searching in MR9
- Looking up locations
- Entering general location information
- Entering additional location information
- Entering information about doctors
- Updating locations

Updating locations

When adding a location to your MR9 database or at any time later, you can add to or edit the location's information.

1. Find the location

Access a location to update in one of the following ways:

- **By searching**
  Entities > Locations (see Searching locations).
- **In an order**
  Click or **> View Location** next to **Location** in the Location pane of an order, then click **Edit** in the **View Location** panel.

2. Update information

1. Within an Edit Location window, you can enter or update any information you entered, except notes entered in the Notes Log (which can only be canceled, see Canceling notes).
   - **General**
     Enter basic location information, including contact information and important warnings. See Entering general location information.
   - **Additional**
     To enter information about records pickup/subpoena delivery, see Entering additional location information.
   - **Doctor Info**
     If location is a doctor's office or similar, enter information about the doctor. See Entering information about doctors.
   - **Notification Email**
     To manage which email addresses receive order, accounting, or repository upload emails for this location, see Managing notification emails.
   - **Tags**
     Select tags to mark the location as part of specific groups, which you can use for different purposes, such as monitoring or marketing. See Organizing with tags. (Location tags and default are set in Lists > Locations.)

- **Repository**

  Keep files related to the location in your MR9 database. See Uploading files to a repository.

- **Notes Log**

  Keep a set of notes about this location for internal purposes. See Making entries in notes logs, Managing notes logs, and Canceling notes.

2. Click **Save >**

   - **Save & Edit:** To save your work and continue updating location information.
   - **Save & Close:** If you have no more information to add at this time.

TIP: No longer need a location?
You can delete it or merge it into another location, saving its historical data. See Removing entities.

Reference

- Notes Log
- Tags
- Lists > Locations

Step-by-step instructions

- Adding locations to MR9
- Searching locations
- Entering general location information
- Entering additional location information
- Entering information about doctors
- Managing notification emails
- Organizing with tags
- Uploading files to a repository
- Making entries in notes logs
- Managing notes logs
- Canceling notes
- Removing entities

Setting up business units

Add your company's revenue centers to MR9 as different business units (BUs), so you can track and report their activities separately. After setting up one BU with your company information, save time and reduce errors by creating additional BUs from the first one.

1. Start a new business unit

- **From scratch**

  Entities > Business Units, click **New.**

- **From existing BU**

  If you have previously created BUs, you can copy one with all of its details, then update the information to quickly create a new BU.

  1. **Entities > Business Units,** click .
  2. Existing BUs appear in the results pane. Locate the business unit you want to copy from and click its:
     - **> Edit**
     - Hyperlinked **BU ID.** Then in the View BU window, click **Edit.**
  3. In the Edit BU window, click **More > Copy & New.** All of the BU's details are copied into the New BU window, except company logos.

2. Enter required info

In New BU window, enter:

1. ***BU Name**
   Required. Name for the business unit. BU names do not have to be unique.
2. ***BU ID**
   Required. An up-to-10-character business unit ID. Use a unique abbreviation that is concise and meaningful. See Best Practices: Business Unit ID.

3. Enter optional info

Other BU information is optional and can be entered before saving or later.

- **General**

  To enter basic BU information, including location and contact information, see Entering general BU information.

- **Additional**

  To enter miscellaneous information about the BU, see Entering additional BU information.

- **Preferences**

  To enter scheduling, production and billing preferences, see Entering BU preferences.

- **Accounts**

  To select accounts for different types of financial transactions involving the business unit, see Selecting BU financial accounts.

- **Invoice/Statement Logo**

  To include your logo on financial correspondence, see Adding your company logo to invoices.

4. Save business unit

1. Click **Save.**
2. In the **New BU** popup that appears, select:

   Yes: To let active users access this BU.

   No: To restrict access to this BU. For example if you want a BU that is only used for new orders coming from client requests through MR Connect. See Contact – Orders preferences.

3. MR9 saves the business unit, the New BU window changes to Edit BU window. To add or edit BU information, see Updating business units.

TIP: How many BUs to set up
While you can have hundreds of business units in MR9, we recommend setting up as few as possible so that when designating a business unit, you don't have to scroll through a long list of BUs to find one.

Reference

- Best Practices: Business Unit ID
- Chart of Accounts
- QuickBooks Integrator
- Lists > Accounting
- MR Connect
- Orders preferences

Step-by-step instructions

- Entering general BU information
- Entering additional BU information
- Entering BU preferences
- Selecting BU financial accounts
- Adding your company logo to invoices
- Updating business units
- Removing entities

Updating business units

When adding a business unit to your MR9 database or at any time later, you can add to or edit the business unit information.

1. Find the business unit

1. **Entities > Business Units,** click . If desired, narrow the search by entering part of a city name in **City** before clicking .
2. BUs that fit your search criteria appear in the results pane. To update the business unit click its:
   - **> Edit**
   - **> View.** In the View BU window, click **Edit.**

2. Update information

1. In the Edit BU window:
   - **General**

     To enter basic BU information, including location and contact information, see Entering general BU information.
   - **Additional**

     To enter miscellaneous information about the BU, see Entering additional BU information.
   - **Preferences**

     To enter production and billing preferences, see Entering BU preferences.
   - **Accounts**

     To update the accounts used for different types of financial transactions involving the business unit, see Selecting BU financial accounts.
   - **Invoice/Statement Logo**

     To include your logo on financial correspondence, see Adding your company logo to invoices.
2. Click **Save >**
   - **Save & Edit:** To save your work and continue updating BU information.

- **Save & Close:** If you have no more information to add at this time.

TIP: No longer need a BU?

You can delete it or merge it into another BU. See Removing entities.

Reference

- Best Practices: Business Unit ID

Step-by-step instructions

- Setting up business units
- Entering general BU information
- Entering additional BU information
- Entering BU preferences
- Selecting BU financial accounts
- Adding your company logo to invoices
- Removing entities

Removing entities

If you no longer want an entity to appear in MR9 results, you can remove it from MR9 in one of 2 ways.

- **Delete**

  If you no longer need the entity or its historical data:

  1. Click the entity's **> Delete** in the main window's results grid or click **Delete** in the entity's View/Edit window.
  2. Click **Yes** in the popup that appears.

- **Merge**

  If you do not want the entity appearing in MR9 results — but want to save its historical data — merge it into another entity of the same kind (i.e., merge a contact into another contact). See Merging data.

Reference

- Historical data saved in a merge

Step-by-step instructions

- Updating firms
- Updating contacts
- Updating locations
- Updating business units
- Merging data

Lists

Dropdown lists in MR9 allow users to choose an entry from a set of available values, saving time and reducing errors that result from keying in entries. MR9 includes initial values and defaults for dropdown lists used throughout the system. You can edit or delete these entries. You cannot create new lists but you can add your own entries to MR9 lists.

To customize these lists, see Customizing lists.

- Accounting
- Connect
- Contacts
- Firms
- Invoice
- Locations
- Orders
- Others
- Parts
- Production
- Repository
- Tracking
- Users

Step-by-step instructions

- Customizing lists

Users and Groups

Users and Groups is the tool you use to manage MR9 users, individually and grouped according to permissions, rights, and notifications.

IMPORTANT: Restrict Users and Groups access to administrators only

Due to the sensitivity surrounding user account administration, limit access to Users and Groups to users in the Administrators Security Group.

Reference

- Users
- Groups

Step-by-step instructions

- Creating user accounts
- Managing groups

Chart of Accounts

The **Chart of Accounts** is a listing of all of the accounts in the general ledger, each account accompanied by a reference number (account number). MR9 uses these accounts for different financial activities in your company's business units.

TIP: Match MR9 accounts to your business uses

Although MR9 is not a general accounting system, it uses account numbers to keep track of sales, cash receipts, accounts receivable, payable and other transactions. You can set up MR9's accounts to match your general ledger or accounting software.

Reference

- Lists > Accounting
- Business units

Step-by-step instructions

- Customizing accounts

Service Item Subgroups

Group miscellaneous service items into lists of related items called **Service Subgroups.** Then, when billing, you can locate individual items quickly in their small subgroups, instead of scrolling through a long, undifferentiated list of all of your miscellaneous service items.

Reference

- Service items

Step-by-step instructions

- Organizing service items

Service Item Master

The **Service Item Master** defines your firm's services for clients and staff to select from dropdown lists in MR9 and MR Connect. Instead of longhand requests from clients or inconsistent descriptions in billing rate tables, service item descriptions are consistent throughout your system.

TIP: Customize the list with all of the services you offer

Include all of the services that you bill clients for in this list, grouped by category. Each billing rate table and online order form derives its service items list from this master template.

Reference

- Service Items
- Service Groups
- MR Connect

Step-by-step instructions

- Adding service items

Billing Rates

Billing rates are the amounts you charge for services. These rates are organized into tables, so you can charge different clients different amounts for the same service items by applying different billing rate tables.

TIP: Set up Billing Rate Groups first

Billing rate tables are further organized into Billing Rate Groups, groups of similar tables, so when billing you can search through a subset of your billing rate tables instead of the whole long list of tables. Set up groups first, then rate tables.

Reference

- Billing Rate Group

Step-by-step instructions

- Setting up billing rates

Billing Sets

If you have ever ordered a combo meal at a fast food joint, then you already understand what MR9 **Billing Sets** are: Preset groups of service items that speed up the billable services selection process because you only have to choose the set, not each of the items individually.

TIP: Properly set up billing sets save time

You can include any number of service items in a billing set. Then when invoicing, you add service items for each attorney automatically by selecting the appropriate billing set.

Billing sets are not tied to billing rate tables. They only contain service items, so the same set can be used for invoices that you will be charging different rates for the same services on. You apply the actual billing rates when billing the order.

If your billing staff does not need all of the items in a billing set at the time of billing a particular order, they can deselect any items in the billing set they will not be using for that invoice.

Reference

- Service items

Step-by-step instructions

- Setting up billing sets
- Managing billing sets

Invoice Headers

Invoices in MR9 include a short descriptive title called the **invoice header.**

TIP: If the default header isn't enough, create your own

MR9 automatically generates a standard invoice header for each record based upon your input. Create your own custom headers for specific circumstances, then organize them into groups to save you time locating one when billing.

Step-by-step instructions

- Setting up invoice headers
- Selecting invoice headers

Invoice Messages

Invoices in MR9 can include additional written communications called **invoice messages.**

TIP: Customize your invoice messages

Create a set of messages to fit different circumstances, then apply them to invoices during Turn In.

Reference

- Turn In

Step-by-step instructions

- Setting up invoice messages

Scopes

Scope defines extent and range of records being requested. You can set up an unlimited number of scopes per record type.

Reference

- Lists > Parts > Record Type

Step-by-step instructions

- Setting up scopes
- Managing scopes

Repository Descriptions

Instead of typing a description for each file uploaded to MR9 repositories, develop a list of typical descriptions you can pick from to include with files when uploading. Repsitory descriptions make it easier to find the correct file to download later.

Reference

- Repository

Step-by-step instructions

- Setting up repository descriptions

States

Customize the State dropdown list in MR9. Add, edit, and delete states for countries other than the USA. Shorten State dropdown lists by hiding states you don’t need.

Step-by-step instructions

- Managing states

Tracking Steps

Set up MR9 Tracking to match your workflow so you can track orders as they move through the process. First set up items to be tracked (in Lists > Tracking), then define the steps each item goes through in your workflow.

Reference

- Tracking
- Tracking Item
- Lists > Tracking

Step-by-step instructions

- Defining tracking steps

Form Types and Groups

MR9 includes a set of categories that form templates are grouped under that are called **Form Types.** You can edit, delete, or add your own form types.

You can further group form templates into subcategories in these form types, called **Form Groups,** to make managing and using templates easier.

Reference

- Form Templates

Step-by-step instructions

- Organizing with form types & groups

Form Data List Templates

When MR9 prints a list of parties or locations on documents, it uses preset data source templates to determine what data fields are printed. You can edit these templates to better fit your company's needs.

Reference

- Parties
- Locations

Step-by-step instructions

- Modifying data list templates

Form Packages

Form Packages are preset groups of forms that speed up the document printing process because you only have to choose a package — not all of the individual forms. Create as many packages as you need. Each package can include an unlimited number of forms selected from any category.

Reference

- Form Templates
- Send Forms

Step-by-step instructions

- Creating form packages

System Preferences

Preferences set here are global: They are used throughout your MR9 system by all users. Preferences that only affect your individual MR9 setup are available under User Preferences (see Setting personal preferences).

NOTE: Required preferences for email

If you will be sending emails from MR9, enter your company's email settings in **General > Email** first. Other preferences can be customized at any time.

- General
  - Email
  - Forgot Password Email
  - License Info
  - Login
  - Notifications and Messages
  - Session Timeout
  - System Time
- Orders
  - Assemble Court
  - Holidays
  - New Order
  - Order Status Color
  - Part Status Color
  - Tracking Step Automation
  - Worksheet
- Production
  - Envelopes
  - FedEx Account for Shipping Labels
  - Repository
  - UPS Account for Shipping Labels
- Billing
  - Invoice
  - LEDES 1998B

    - Reward Points
- Receivables
    - Payment Receipts
    - Statement
- Payables
    - Check
    - Check Reconcilliation Data
- Tools
    - Email Log
    - QuickBooks
- Entities
    - Contacts
    - Firms

Step-by-step instructions

- Customizing global preferences
- Setting personal preferences

Customizing lists

You can add, edit, merge, delete, and hide list entries. You can also set the default entry for each list that appears in any field tied to that list.

1. Select list

1. **Setup > Lists**
2. Click [main category] > [desired subcategory] in the Lists window's left pane to select a list to customize.

2. Customize list

Add, edit, merge, or delete entries in MR9 lists. To:

- **Add a dropdown entry**

  1. Click **New.** *(If a subcategory does not allow adding entries, this button is disabled.)*

     - ***Name** *(required)* – Enter the new entry's label.
     - **Set as Default** – Slide to Yes to make the entry appear as the list's default choice.
     - **Show to Contact** – If this option appears, slide to Yes to have the entry appear as a selection in contacts' MR Connect.

       IMPORTANT: MR Connect functions might not work if no list entries are enabled

       If **Show to Contact** is an option for entries in a list, at least one list entry must be enabled (set to Yes) or users will not be able to save or submit their online requests/information. If you do not wish to give users access to the list, make a blank entry and select Yes so users have a choice selected in the related dropdown in MR Connect.

  2. Click **Save >**

     - **Save & New:** To continue adding entries in this subcategory.
     - **Save & Close:** If you have no more entries for the subcategory.

- **Edit a dropdown entry**

  1. In the Lists window's results pane, locate the entry to be edited and click its:

     - **> Edit.**

- **> View** or the hyperlinked **Name.** In the entry's View List window, click **Edit.**

2. Update the entry (any options that are grayed out cannot be updated):
   - ***Name** *(required)* – Edit text to change how entry appears in lists.
   - **Set as Default** – Slide to Yes to make the entry appear as the list's default choice.
   - **Active** – Default is Yes. Slide to No to stop entry from appearing in lists but not remove it from the system.
   - **Show to Contact** – If this option appears, slide to Yes to have the entry appear as a selection in contacts' MR Connect or select No to hide it from contacts.
3. Click **Save.**

- ### Merge dropdown entries

  If you no longer need a particular entry — but want to keep its historical data — you can merge it into an existing entry of the same data type. See Merging data. *(Entries that are required in MR9 will not have a **Merge To** option.)*

- ### Delete a dropdown entry

1. In the Lists window's results pane, locate the entry to be deleted and click its:
   - **> Delete.** *(If an entry cannot be deleted, this option is not available.)*
   - **> View/Edit** or the hyperlinked **Name.** In the entry's View List/Edit List window, click **Delete.** *(If an entry cannot be deleted, this button is disabled.)*
2. Click **Yes** in popup window.

TIP: How to delete default entries

An entry that is designated as the default for a list cannot be deleted. If you want to delete a default-designated entry, you must set a different entry in the list as the default. Then you can delete the desired entry if it is not required by MR9.

- ### Hide a dropdown entry

  Some MR9 list options are not deletable but you might be able to remove them from dropdown lists by de-activating them. You can also hide deletable entries that you don't want to remove from the system but don't need to appear as options in lists.

1. In the Lists window's results pane, locate the entry to be hidden and click its:

- **> Edit.**
- **> View** or the hyperlinked **Name.** In the entry's View List window, click **Edit.**

2. Click **Active** to select No to stop entry from appearing in lists but not remove it from the system. If the slider is grayed out, the entry is essential in MR9 and you are not allowed to hide it.
3. Click **Save.**

Reference

- MR Connect
- Accounting list
- Connect list
- Contacts list
- Firms list
- Invoice list
- Locations list
- Orders list
- Others list
- Parts list
- Production list
- Repository list
- Tracking list
- Users list

Step-by-step instructions

- Merging data

Creating user accounts

Set up user accounts for everyone who needs to access MR9. Store work-related and personal information about them. Give them user names and initial passwords to access MR9. (After logging in, users can create their own passwords in Change Password. See Updating your password.)

Assign users to security groups that give them permissions to only the actions they need to perform. Individual users can be members of multiple security groups, so if you have employees whose responsibilities overlap different areas, such as someone who oversees both orders and billing, you can give that person access to both areas through membership in different security groups.

You can also assign users to message groups, so you can send a message to all the members of a group simultaneously.

NOTE: Passwords are personal

If a user forgets their password, administrators do not have a way to retrieve the password. Users can use **Forget Password** on the Login screen to set a new password. See Setting your password at log-in. Or an administrator can reset the user's password for them. See Resetting passwords.

1. Create new user

1. **Setup > Users and Groups**
2. In the Users and Groups window, click **New.**
3. In the New User window, enter user's **First Name** and **Last Name** in their fields, then select the naming convention in ***Full Name** *(required).*
4. If your system uses email addresses as login names, enter the user's email address in **Email.** (Set in System Preferences > General.) Otherwise, enter a unique login name for the user in ***Login Name** *(required).*
5. Enter a strong password in ***Password** *(required).*
6. Click **Save.** The window changes to Edit User, adds **Groups** and **Business Units** panes, and opens the **Add Business Units** panel.
7. In the **Add Business Units** panel, all of your MR9 BUs appear. Check the box(es) of BU(s) the user should be associated with (you must select at least one BU), then click **Save.**

2. Enter other information

- To enter general work-related information about the user, such their order title, see Entering & updating general user information.

- To enter personal information about the user, such as their home address, see Entering & updating personal user information.
- To enter a sales representative's commission rate, see Entering pay information.
- Users must be a member of at least one security group but can be in an unlimited number of security and message groups. To manage a user's group memberships, see Managing user's group memberships.

Reference

- Change Password
- Security groups
- Message groups
- System Preferences > General
- Strong password
- Business Units

Step-by-step instructions

- Updating your password
- Setting your password at log-in
- Resetting passwords
- Entering & updating general user information
- Entering & updating personal user information
- Entering pay information
- Managing user's group memberships

Managing groups

MR9 includes 2 default security groups, Administrators and Users, which cannot be deleted. You can update their descriptions, change permissions (Users group only), and add or remove members.

You can add new security groups with their own permissions and users. These groups can be updated and deleted when you no longer need them.

You can also add, edit, and delete message groups.

1. **Setup > Users and Groups**
2. In the Users and Groups window, under **Groups,** click:
   - **Message Groups**

     To manage an existing group or create a new one for sending messages to all members at once.
   - **Security Groups**

     To manage an existing group or create a new one of users with a special set of rights/permissions.
3. MR9 displays all existing groups in the category. To:
   - **Create a new group**

     To add security groups or message groups, see Creating groups.
   - **Update a group/Add or delete group members**

     1. Locate the group you want to manage and click its:
        - **> Edit**
        - **> View.** Then in the View Message Group/View Security Group window, click **Edit.**
        - Hyperlinked **Group Name.** Then in the View Message Group/View Security Group window, click **Edit.**
     2. To:
        - **Edit group names and descriptions,** see Updating groups.
        - **Add or delete members,** see Adding or deleting group members.

Set security permissions

To set access levels to different MR9 functions in a security group, see Setting security group permissions.

- ## Delete a group

  Except the 2 default Security Groups

  1. To delete a group, in the **Groups > Message Groups/Security Groups** pane click its:
     - **> Delete.** *(If the group cannot be deleted, this option is not available.)*
     - **> View/Edit** or the hyperlinked group name. Then in the group's View/Edit window, click **Delete.** *(If the group cannot be deleted, this button is disabled.)*
  2. Click **Yes** in the popup.

Reference

- Groups
- Users
- Message groups
- Security groups

Step-by-step instructions

- Creating user accounts
- Adding or deleting group members
- Updating groups
- Setting security group permissions

Customizing accounts

MR9's Chart of Accounts comes with a default set of accounts — but you can add, edit, and delete list entries to match MR9 to your general ledger or accounting software. When you have set up your accounts, you then designate which accounts to use for different financial activities in your company's business units.

View existing accounts

1. **Setup > Chart of Accounts**
2. In the Chart of Accounts window, **Account Type** defaults to ALL. Click to see all the accounts already entered into MR9. (Always check before adding a new account.) Restrict the results by clicking and selecting account type(s) to search. See Lookup Panel.
3. MR9 displays the results. You can add, edit, or delete accounts.

Add account

1. In the Chart of Accounts window, click **New.**
2. In the New Account window:
   - **Account Type**
     Default appears. Select different account type in dropdown, if desired. (Account Types and default are set in Lists > Accounting. See Customizing lists.)
   - ***Account No.**
     Required. Enter a new account number.
   - ***Account Name**
     Required. Enter the new account's label.
   - **Active**
     Slide to No to stop account from appearing in lists but not remove it from the system.
3. Click **Save >**
   - **Save & New:** To continue adding accounts.
   - **Save & Close:** If you are done adding accounts.

- ## Edit account

1. In the Chart of Accounts window's results pane, locate the account to be edited and click its:
   - **> Edit**
   - **> View** or the hyperlinked **Account No.** Then in the View Account window, click **Edit.**
2. In the Edit Account window:
   - **Account Type**
     Defaults to the choice previously selected. Select different account type in dropdown, if desired.
   - **Account No.**
     Reference number of the account *(uneditable).*
   - ***Account Name**
     Required. Edit text to change how account appears in lists.
   - **Active**
     Slide to Yes to have account appear in lists or No to stop account from appearing in lists but not remove it from the system.
3. Click **Save.**

- ## Delete account

1. In the Chart of Accounts window's results pane, locate the account to be deleted and click its:
   - **> Delete.**
   - **> View/Edit** or the hyperlinked **Account No.** Then in the View Account/Edit Account window, click **Delete.** Click **Yes** in popup.

Reference

- Business units
- Lookup Panel
- Lists > Accounting

Step-by-step instructions

- Customizing lists
- Selecting BU financial accounts

Organizing service items

To make finding a particular service item quicker, set up Service Subgroups, then arrange your company's billable services into these subgroups. MR9 includes a default set of Service Subgroups. Some groups are required by MR9 and are uneditable but you can add, delete or modify miscellaneous service subgroups.

1. **Setup > Service Item Subgroups**
2. To see existing subgroups:
   - Click to see all existing subgroups.
   - Click the **Service Group** and select 9. Misc. Charge to search only editable subgroups before clicking . See Lookup panel.
3. MR9 lists all subgroups that meet your search criteria. To:
   - **Add a new subgroup**
     1. In the Service Item Subgroups window, click **New.**
     2. In the New Service Item Subgroup window, **Service Group** is set to 9. Misc. Charge and is uneditable. Enter a name in ***Service Subgroup** *(required).*
     3. Click **Save >**
        - **Save & New:** To save the subgroup and add more subgroups.
        - **Save & Close:** When you have no more subgroups to add.
   - **View a subgroup**
     1. In the Service Item Subgroups window, click the Service Subgroup's:
        - **> View.**
        - Hyperlinked **Service Subgroup** name.
     2. To return to the main window click **Close.**
   - **Modify a subgroup**
     1. In the Service Item Subgroups window, click the Service Subgroup's:
        - **> Edit.**
        - **> View** or hyperlinked **Service Subgroup** name. In the View Service

Subgroup window, click **Edit.**

2. In the Edit Service Subgroup window, enter a new name in ***Service Subgroup** *(required).*
3. Click **Save.**

- **Delete a subgroup**

1. In the Service Item Subgroups window, click the Service Subgroup's:
   - **> Delete.** *(If an entry cannot be deleted, this option is not available.)*
   - **> View/Edit** or the hyperlinked **Service Subgroup** name. In the View Service Subgroup/Edit Service Subgroup window, click **Delete.** *(If an entry cannot be deleted, this button is disabled.)*
2. Click **Yes** in the popup.

BEST PRACTICES: Organize service items to save time

As your firm expands into other business areas, you will add more service items to the master list. It is not uncommon to end up with hundreds of service items. Organizing related service items into well-designed subgroups will help you find a particular service item quickly without scrolling up and down a long list.

NEXT: Set up service items

In Service Item Master, you enter all of the services you provide, along with their details including LEDES codes, if you provide e-billing to your clients.

Reference

- Service items
- Lookup panel
- Service Item Master

Step-by-step instructions

- Adding service items

Adding service items

After setting up subgroups, enter your company's billable services with their details into the Service Item Master. You will use these items for setting billing rates.

1. Create new item

1. **Setup > Service Item Master**
2. Click **New.**
3. In the New Service Item window, **Service Group** defaults to 9. Misc. Charge, and is uneditable. Choose the appropriate **Service Subgroup** in the dropdown.
4. Enter a name for the ***Service Item** *(required).* The maximum length of this field is 128 characters.

2. Set defaults

To set billing rates and other options for a service item, see Entering/updating billing rates.

3. Add e-billing

If you have clients who require that invoices be submitted electronically (e-billing), fill in the fields in **LEDES 1998B** pane. See Entering UTBMS codes for service items.

4. Save service item

Click **Save >**

- **Save & New:** To save the item and start a new item.
- **Save & Close**: If you are finished adding service items.

Reference

- Service items
- Service Item Subgroups
- Service Groups
- Billing rates
- Electronic billing

Step-by-step instructions

- Organizing service items
- Entering/updating billing rates
- Entering UTBMS codes for service items

Setting up billing rates

After setting up Billing Rate Groups, enter your billing rate tables in the appropriate group. Then, when billing, you only have to scroll through the rate tables in one of these smaller groups, instead of your entire list of rate tables.

You can set up billing rate tables 2 ways:

- **From scratch**

  To fill a new blank table with billing rates:

  1. **Setup > Billing Rates**
  2. Click **New.** To set up the table, see Creating & updating billing rate tables.

  TIP: Check first

  It's not uncommon to have 100s of billing rates, so if you have already set up some rates, click first to check to see if you are about to duplicate an existing rate before creating a new table.

  If you have duplicate or unneeded billing rate tables, you can delete them by clicking **> Delete** in their listings in the Billing Rates's results grid or clicking **Delete** in their View Billing Rate/Edit Billing Rate window.

- **From an existing table**

  Copy and update an existing table to create a new table quickly.

NEXT: Create Billing Sets to speed up invoicing

Like a combo meal, Billing Sets are preset groups of service items that speed up the billable services selection process because you choose the set, not each item individually. You create the sets for your billing staff to apply to invoices.

Reference

- Billing Rate Groups
- Lists > Accounting

Step-by-step instructions

- Customizing lists
- Creating & updating billing rate tables
- Copying billing rate tables

Setting up billing sets

Set up a new billing set anytime you find yourself selecting the same set of services for multiple orders.

1. Create a new set

1. **Setup > Billing Sets**
2. Click to see existing billing sets.
3. Click **New.**
4. In the New Billing Set window:
   - ***Billing Set Name**
     Required. Enter a descriptive name to appear in Billing Set lists.
   - **Set as Default**
     Slide to Yes to have this billing set appear first when prefilling services on invoices.
   - **Remarks**
     Enter an expanded description of the billing set.
5. Click **Save.**

2. Enter service details

1. Window changes to Edit Billing Set. **Service Items** pane and more options appear.
2. Scroll or jump to **Service Items** pane and click .
3. In the **New Service Item** panel:
   - **Service Group**
     Defaults to 9. Misc. Charge. Select a different service group, if desired, in the dropdown.
   - **Service Subgroup**
     Select a service subgroup in the dropdown. Only those service items belonging to the selected subgroup appear in the **Service Item** dropdown below.
   - **Service Item**
     Select a service item in the dropdown.

- **Units**
  Enter the default number of units.

3. ## Save set

   Click **Save >**

   - **Save & New:** To continue adding service items to the Billing Set.
   - **Save & Close:** When finished adding service items to the Billing Set.

TIP: Copy & update billing sets to save time

In addition to updating existing billing sets, you can also create a new set from an existing one. See Managing billing sets.

NEXT: Customize your company's invoices

You can add custom headers and messages to your invoices. Start with invoice headers. Add your own headers to use instead of the MR9 defaults. Then add invoice messages to give your clients more information.

Reference

- MR Connect
- Service Group
- Service Subgroup
- Service items

Step-by-step instructions

- Managing billing sets
- Setting up invoice headers

Setting up invoice headers

In addition to the included invoice headers in MR9, you can create your own, customized for specific circumstances. Organize your custom headers into groups to save time locating one when billing. Delete headers you no longer need to keep your lists of headers manageable.

1. View existing headers

1. **Setup > Invoice Headers**
2. **Invoice Header Group** defaults to ALL. Click to see all the custom invoice headers already entered into MR9. You can restrict the results by clicking and selecting group(s) to search. See Lookup Panel. (Invoice Header Groups are set in Lists > Invoice.)
3. MR9 displays the results. To:
   - **Create a new header** – Click **New.**
   - **View a header** – Click its **> View** or hyperlinked text.
   - **Edit a header** – Click its **> Edit.** Or click **Edit** in the View Invoice Header window.
   - **Delete a header** – Click its **> Delete.** Or click **Delete** in the View Invoice Header window. Then click **Yes** in the popup.

2. Create/update header

1. In the Edit Invoice Header/New Invoice Header window:
   - **Invoice Header Group**
     Defaults to the system default or choice previously selected. (System default is selected in Lists > Invoice.) Choose a different group in the dropdown if desired.
   - ***Invoice Header**
     Required. Edit or enter the header text exactly as you want it to appear on invoices.

3. Save header

- In Edit Invoice Header window, click **Save** to update the header.

In New Invoice Header window, click **Save >**

- **Save & New:** To save the header and add another header.
- **Save & Close:** When you have no more headers to add.

NOTE: Create headers on the fly

You can create headers when generating invoices. MR9 will not save those invoice headers so this is a good option if you only need a header one time. See Selecting invoice headers.

NEXT: Create custom invoice messages

Further customize your invoices by creating invoice messages to give your clients more information.

Reference

- Lists > Invoice

Step-by-step instructions

- Selecting invoice headers
- Setting up invoice messages

Setting up invoice messages

You can create and group messages in a similar way to invoice headers, which can then be selected and modified on individual invoices. Delete messages you no longer need to keep your lists of messages manageable.

1. View existing messages

1. **Setup > Invoice Messages**
2. **Invoice Message Group** defaults to ALL. Click to see all the custom invoice messages already entered into MR9. You can restrict the results by clicking and selecting group(s) to search. See Lookup Panel.
3. MR9 displays the results. To:
   - **Create a new message** – Click **New.**
   - **View a message** – Click its **> View** or hyperlinked text.
   - **Edit a message** – Click its **> Edit.** Or click **Edit** in the View Invoice Message window.
   - **Delete a message** – Click its **> Delete.** Or click **Delete** in the View Invoice Message window. Then click **Yes** in the popup.

2. Create/update message

1. In the Edit Invoice Message/New Invoice Message window:
   - **Invoice Message Group**
     Defaults to the choice previously selected. (System default is set in Lists > Invoice.) Choose a different group in the dropdown if desired.
   - **Invoice Message**
     Unlimited character count. Edit or enter a message to appear on invoices. Can be left blank, if desired. To customize the appearance of the message, see Customizing notes & messages. Text customizations will appear on the print version of invoices.
   - **Set as Default**
     Slide to Yes to have this message appear as the default on invoices. You can override the default on individual invoices.

3. ## Save message

- In Edit Invoice Message window, click **Save** to update the message.
- In New Invoice Message window, click **Save >**
  - **Save & New:** To save the message and add another.
  - **Save & Close:** When you have no more messages to add.

TIP: Save time creating new messages

Copy the text from an existing message in the Invoice Message window before clicking **New.** Then paste the message in the New Invoice Message window's Invoice Message field and revise it.

Reference

- Invoice Headers
- Lookup Panel
- Lists > Invoice

Step-by-step instructions

- Setting up invoice headers
- Customizing notes & messages

Managing scopes

MR9 comes with a default set of scopes which you can edit to better match your requirements or delete if not needed. And you can set up new scopes at any time.

1. Find scopes to manage

1. **Setup > Scopes**
2. Click to check existing scopes. To restrict the results, click **Record Type's** and select one or more record types in the popup before clicking . See Lookup panel. (Record Types are set in Lists > Parts > Record Type.)

2. View scopes

All scopes that match your search criteria appear in the results pane. To:

- ### View a scope's details

  In the Scopes' results grid click the scope's:

  - **> View**
  - Hyperlinked **Scope**

  The View Scope window opens.

- ### Update the scope

  In the Scopes' results grid click the scope's:

  - **> Edit.** The Edit Scope window opens.
  - **> View** or the hyperlinked **Scope.** In the View Scope window, click **Edit.**

  To edit the scope, see options in Setting up scopes. When finished, click **Save** in the Edit Scope window.

- ### Delete the scope

  In the Scopes' results grid click the scope's:

  - **> Delete**
  - **> View** or the hyperlinked **Scope.** In the View Scope/Edit Scope window, click **Delete.**

  Click **Yes** in the popup that appears.

- **Create a new scope**
  See Setting up scopes.

Reference

- Lookup panel
- Lists > Parts > Record Type

Step-by-step instructions

- Setting up scopes

Managing states

If your business extends beyond the United States, you can add and delete states/territories in other countries so State dropdowns in MR9 include all areas you cover. If you can't delete a state, you can hide it so it doesn't appear in MR9 dropdowns.

1. **Setup > States**
2. Click to view existing states. To restrict the results, click **Country's** ▾ and select one country in the dropdown before clicking .
3. All states that match your search criteria appear in the results pane. To:

   - ### View a state's details

     In the States' results grid click the state's:

     - **> View**
     - Hyperlinked **State Name**

     The View State window opens.

   - ### Update a state

     1. In the States' results grid click the state's:
        - **> Edit.** The Edit State window opens.
        - **> View** or the hyperlinked **State Name.** In the View State window, click **Edit.**
     2. Not all fields are editable. To edit the state, see options in Create a new state below. When finished, click **Save** in the Edit State window.

   - ### Delete a state

     1. In the States' results grid click the state's:
        - **> Delete**
        - **> View** or the hyperlinked **State.** In the View State/Edit State window, click **Delete.**
     2. Click **Yes** in the popup that appears.

     #### TIP: Hide states you can't delete

     You cannot delete any states that are part of the United States. If you don't need a

state but can't or don't want to delete it, you can de-activate it so it doesn't appear in dropdown lists. Open the state's Edit State window and slide **Active** to No, then click **Save.**

- **Create a new state**

1. In the States window, click **New.**
2. In the New State window, enter or select options:
   - ***Country**
     Required. click ▾ and select the state's country in the dropdown.
   - ***State Name**
     Required. Enter the state's name.
   - **State Abbreviation**
     Enter the state's abbreviation.
3. Click **Save >**
   - **Save & New:** To continue adding states.
   - **Save & Close:** When finished adding states.

Reference

- Lists > Parts > Record Type

Defining tracking steps

After setting up item types to be tracked, create steps that each kind of item/major category of work goes through in your workflow. If an item passes through different departments or staffers as it is produced and completed, you can add alerts to specific steps to automatically notify people when the item is their responsibility. Make specific steps visible to clients on MR Connect. Update tracking steps or delete them as needed.

1. **Setup > Tracking Steps**
2. In Tracking Steps window, click on the type of **Tracking Item** you want to work with. (Tracking Item categories are set in Lists > Tracking.)

• Add step

1. Click **New.**
2. In New Tracking Step window, **Tracking Item** is not editable. Enter other information:
   - ***Step Name**

     Required. Enter a descriptive label.
   - **Due Days**

     Enter a default turn-around time for the step, if desired.
3. Click **Save.** Window changes to Edit Tracking Step window and adds **Publish** and **Active** sliders set to Yes and **Users to notify** pane.

• Add alerts

For steps that involve handing work off to another person/department or that additional staff need to know a milestone has been achieved, set up alerts that MR9 will send to their MR9 inbox when the milestone is reached. For example, when records are received and entered into MR9, set up a Records Obtained step that notifies users in your production department so they know to begin processing the records.

1. To automatically alert users when a step is completed so they can proceed with the next step, click in Edit Tracking Step window's **Users to notify** pane.
2. In the **Add Users** panel, check the box(es) of MR9 user(s) to be notified. See Managing users to notify.
3. Click **Save.**
4. In Edit Tracking window, click **Save >**

- **Save & New –** To add another step without leaving the **New Tracking Step** panel.
- **Save & Close –** If you don't have more information to include about the tracking step or additional steps to add.

5. In Tracking Steps window, click **Refresh Tracking Items** to have MR9 update the **Notify** column.

- ## Edit step

1. In Tracking Steps window's results pane, locate the tracking step you want to update and click its:
   - **> Edit**
   - **> View** or its hyperlinked **Step Name.** Then in View Tracking Step window, click **Edit.**
2. In Edit Tracking Step window, you can update any field except **Tracking Item.**
   - ***Step Name**

     Required. Step's label.
   - **Due Days**

     Turn-around time for the step
   - **Publish**

     Slide to No if you don't want the step to be visible to clients on MR Connect.
   - **Active**

     Slide to No if you don't want the step to appear in Tracking but you don't want to delete the step from MR9. If you want to use the step again later, you can re-activate it.
   - **Users to notify**

     To remove a user from the list, check the user's box, then click . Click **Yes** in the popup.
3. Click **Save.**
4. In Tracking Steps window, click **Refresh Tracking Items** to have MR9 update the **Notify** column.

- ## Delete step

  1. To delete a step:

     - **In Tracking Steps window's results pane,** click the tracking step's **> Delete.**
     - **In either the step's View Tracking Step/Edit Tracking Step window,** click **Delete.**

  2. Then click **Yes** in popup window.

- ## Change step order

  In Tracking Steps window's results pane, click:

  - in a step's row to move the step up in the tracking order.
  - in a step's row to move the step down in the tracking order.

Reference

- Tracking Item
- Lists > Tracking
- MR Connect
- Notifications and Messages
- Lookup panel

Step-by-step instructions

- Customizing lists
- Managing users to notify

Customizing global preferences

You must be part of the Administrators group to access System Preference settings or Connect Preferences settings.

1. Access preferences

- **Setup > System Preferences**

  For setting MR9 system-wide preferences and defaults.

- **Connect > Connect Preferences**

  For setting MR Connect preferences and defaults.

2. Customize preferences

Click the desired function, then click **Edit** at the top of its panel. To set:

- **MR9 system preferences**
  - **System-wide** preferences and defaults, see General preferences.
  - **Orders module** preferences and defaults, see Orders preferences.
  - **Production module** preferences and defaults, see Production preferences.
  - **Billing module** preferences and defaults, see Billing preferences.
  - **Receivables module** preferences and defaults, see Receivables preferences.
  - **Payables module** preferences and defaults, see Payables preferences.
  - **Entities module** preferences and defaults, see Entities preferences.
  - **Tools module** preferences and defaults, see Tools preferences.
- **MR Connect Preferences**

  Preferences and defaults for MR Connect functions.

3. Save preferences

Click **Save** at top of function's panel. Then click **Close** at top of function's panel.

Reference

- MR Connect
- General preferences

- Orders preferences
- Production preferences
- Billing preferences
- Receivables preferences
- Payables preferences
- Entities preferences
- Tools preferences
- Connect preferences

Send Invitations

Invite new contacts to your MR Connect by emailing them customized letters that include their user name and other pertinent information.

Reference

- MR Connect

Step-by-step instructions

- Sending invitations

Import Online Orders

If you offer clients the ability to schedule orders online through MR Connect, MR9 will automatically assign them order numbers and import the information submitted with the order request.

Reference

- MR Connect

Step-by-step instructions

- Importing orders from online requests
- Searching online orders

Publish COD Invoices

In MR9 COD invoices are not posted, so as a default, they do not appear in MR Connect. Use this function to allow the clients to pay for and download records that were billed COD.

Reference

- MR Connect
- COD invoices

Step-by-step instructions

- Publishing COD invoices

Fulfill Points Redemption Orders

If you reward contacts with points for booking depos with you, grant their online requests for point award redemption.

Reference

- MR Connect
- Award Points

Step-by-step instructions

- Fulfilling online reward point requests

Support Tickets

Manage MR Connect user questions and problems, and maintain a paper trail of their resolution with support tickets.

Reference

- MR Connect

Step-by-step instructions

- Resolving support issues

Activity Log

MR9 tracks activities by contacts on MR Connect. The activity log will show you who is using your MR Connect and how often they access it.

Reference

- MR Connect

Step-by-step instructions

- Tracking MR Connect activities

Connect Preferences

System-wide defaults for MR Connect functions.

- **General:** System-wide defaults for MR Connect.
- **Login:** Sign-in preferences for MR Connect.
- **Invitation Letter:** Customize email invitations to contacts.
- **Forgot Password Email:** Email instructions for contacts to reset their forgotten passwords.
- **Branding – Connect:** Customize the look and feel of MR Connect.
- **Branding – Portal:** Customize the look and feel of your MR9 Portal.
- **Contact–Announcements:** Enter and format text for the MR Connect home page.
- **Contact–Accessibility:** Designate which areas of MR Connect contacts can access.
- **Contact–My Profile:** Designate who is notified when a contact changes information in their profile in MR Connect.
- **Contact–Attention:** Preferences for what tracking information contacts can view.
- **Contact–Orders:** Preferences for viewing orders in MR Connect.
- **Contact–Account Activity:** Preferences for online invoice access and payment.
- **Contact–Repository:** Set preferences for contacts' repository access and notifications.
- **Contact–Online Orders:** Preferences for records ordering.
- **Contact–Reward Points:** Designate who is notified when contacts request point redemptions.
- **Contact–Support Tickets:** Set preferences for contact support ticket notifications.

Reference

- MR Connect

Step-by-step instructions

- Customizing global preferences

Sending invitations

After entering new contacts into MR9, email them an invitation to MR Connect that automatically includes their login credentials. You can also customize the email to include other information like important instructions and your company logo.

1. **Connect > Send Invitations**
2. In the Send Invitations window's **Search By** pane, **Send To** defaults to Contact and **Entered Date From/Entered Date To** defaults to today. Click to see all contacts entered today, or select some search parameters to narrow the results before clicking :
   - **Send To**
     - **Contact** – Default. To send invitations to one or more contacts.
   - **Firm**

     To invite contact(s) from a single firm. See Looking up firms.
   - **Contact**

     To invite a specific contact, enter all or part of their name.
   - **Entered Date From/Entered Date To**

     Date or date range of when entities were entered into MR9. Change date range, if desired, in Date Navigator.
3. In the search results, check the box(es) of any entity you want to invite. (If there is no box next to an entity's name, that means the entity is missing contact information, such as their email address or login name. Click the hyperlinked entity to add their contact information to their profile. See Adding contacts to MR9.)
4. Click **Send**. See Emailing from MR9.
5. Click **OK** again in the popup that appears when the invitations have been sent. MR notes the success of its emailing for each invitation in the **Result** column.

Reference

- MR Connect
- Date Navigator
- Results pane

Step-by-step instructions

- Looking up firms
- Adding contacts to MR9
- Emailing from MR9

Searching online orders

In addition to importing clients' requests from MR Connect into MR9, you can view an imported request's current status and other details, view and update the related order and its parts, and download related files.

1. **Connect > Import Online Orders**
2. In the Import Online Orders window, all online orders that have not been imported into MR9 appear. You can restrict which results appear by using **Search By** filters:
   - **Status**
     - **Imported** – Select this option and set at least one other search filter to see online requests you've added to MR9.
     - **Not Imported** – Default. To view and import pending online requests. See Importing orders from online requests.
   - **Order No.**

     The order number that MR9 generates for the records request made through MR Connect.
   - **Scheduling Firm**

     Click to select the firm requesting records/services. See Looking up firms.
   - **Scheduling Contact**

     Click to select the contact requesting records/services. See Looking up contacts.
   - **Rush Only**

     Default is No. Slide to Yes to restrict results to only rush order requests.
   - **Order Date From/Order Date To**

     Date record/subpoena requests were entered into MR Connect. Enter a date range, if desired. See Date Navigator.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to requests tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all requests that meet the search criteria.
4. Click a hyperlinked **Order No.** to go to its Import Online Order window to see the request's current status and order details.

Reference

- MR Connect
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Importing orders from online requests
- Looking up firms
- Looking up contacts

Publishing COD invoices

By default, COD invoices cannot be published to MR Connect. If you would like to give a client the ability to pay for a COD invoice online, you can manually publish it to MR Connect. After paying, the client can then download the associated records.

1. **Connect > Publish COD Invoices**

   ### TIP: Flag invoices as COD in Turn In

   Invoices are designated as COD in the **New Invoice/Edit Invoice** panel in Turn In. (See Adding general billing information to invoices.)

2. In the Publish COD Invoices window's **Search By** pane, click to see all outstanding COD invoices, or select search parameters to narrow the results before clicking :

   - **Invoice No.**

     Number of an outstanding COD invoice.

   - **Invoice Date From/Invoice Date To**

     Date or date range of COD invoices for which you received payment. Change date range, if desired, in Date Navigator.

   - **Order No.**

     Order number related to the COD invoice.

   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to find COD invoice(s) for a single part of the order.

   - **Bill To Firm**

     Firm responsible for the COD invoice. See Looking up firms.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to COD invoices tied to specific BUs. See Lookup panel.

3. In the search results, check the box(es) of invoice(s) to select them, then click **Publish to Connect >**

   - **Set Publish to Connect** – The invoice's **Publish to Connect** column will be checked, and the invoice will appear in MR Connect.

   - **Clear Publish to Connect** – The invoice's **Publish to Connect** column will be unchecked, and the invoice will be removed from client's MR Connect.

4. Click **OK** in the popup that appears when the operation is finished.

NOTE: Set up your online payment processing to work in MR9

Before your clients can pay invoices online in MR9, you must set up a business/merchant account with PayPal or one of the other accepted online payment processing services, then enter your credentials in Connect Preferences > Contact – Account Activity.

Reference

- MR Connect
- COD invoices
- Turn In
- Date Navigator
- Lookup panel
- Business Units
- Results pane
- Account Activity preferences
- PayPal
- Payment gateway

Step-by-step instructions

- Adding general billing information to invoices
- Looking up firms
- Setting up a PayPal business account

Fulfilling online reward point requests

If you reward contacts with points for booking depos with you, grant their requests for point award redemption. You can also view point redemption history for a firm or contact.

1. **Connect > Fulfill Points Redemption Orders**

2. In the **Search By** pane, **Redemption Status** defaults to To be fulfilled. Click to see all outstanding requests. Or restrict results by using other filters before clicking :

   - **Redemption Status**

     Default is To be fulfilled. To view redemption requests that have been processed, select Fulfilled in the dropdown.

   - **Date Type**

     Fulfilled Redemption Status only

     Select an option in the dropdown:

     - **Fulfill Date –** Default. To view requests that have been processed within the date range below.
     - **Request Date** – To view processed requests that were submitted via MR Connect within the date range below.

   - ***Date From/*Date To**

     Fulfilled Redemption Status only

     Default is today. Enter a date or date range to see requests for a specific time period. See Date Navigator.

   - **Firm**

     Default is all firms. To see a single firm's requests, click . See Looking up firms.

   - **Contact**

     Default is all contacts. To see a single contact's requests, enter part or all of their name in the field.

3. MR9 lists all of the requests that meet the specified search condition(s). To fulfill requests, check the box(es) of request(s) you want to fulfill to select them.

4. Click **Fulfill.** In the **Fulfill** popup, you can enter notes about the redemption in the **Remarks** field.

5. Click **OK.** MR9 processes the redemption, removing the request from the results pane, and moving it to the contact's Reward Points History.

Reference

- MR Connect
- Award Points
- Date Navigator
- Results pane
- Reward Points History

Step-by-step instructions

- Looking up firms

Resolving support issues

Manage user questions and problems, and maintain a paper trail of their resolution.

1. Find tickets

1. **Connect > Support Tickets**
2. In the **Search By** pane, **Tickets From** defaults to Contact and **Status** defaults to Awaiting Response. Click to see all unanswered requests from clients. Or set search filters to limit results before clicking :
   - **Status**
     - **Awaiting Response** – Default. User has initiated a ticket or replied to a ticket.
     - **Closed** – User has finished with the support issue and rated your response.
     - **Pending Customer Response** – You have replied to the user and are waiting for their further action.
     - **Solved** – You have resolved the issue and/or closed the ticket.
   - **Issued Date From/Issued Date To**

     Enter a date or date range to see tickets initiated within those dates. See Date Navigator.
   - **Firm**

     Click to restrict search to one firm's support tickets. See Looking up firms.
   - **Contact**

     Click to restrict search to one contact's support tickets. See Looking up contacts.
3. MR9 lists all of the support tickets that meet the specified search condition(s) from the newest to the oldest. Click the hyperlinked **Ticket No.** of a ticket you want to follow up on.

2. Reply to tickets

1. In the View Ticket window, click **Reply.**
2. In the **Reply** panel, select an option in **Status To:**

- **Pending Customer Response** – Default. To reply to the ticket and leave it open for user's response.
- **Solved** – To close the ticket.

3. Enter your follow-up comment in ***Message** (to style your message, see Customizing emails, messages & web pages).
4. Click **Send.**
5. MR Connect updates the user's support ticket log and records your reply in the View Ticket window's **Threads** pane. Click **Close.**

NOTE: Choose who is alerted when a support ticket is submitted

Designate which staff person(s) should be notified when contacts post support tickets in Connect > Connect Preferences > Contact – Support Tickets.

Reference

- MR Connect
- Date Navigator
- Support Ticket preferences

Step-by-step instructions

- Looking up firms
- Looking up contacts
- Customizing emails, messages & web pages

Tracking MR Connect activities

MR9 tracks activities by contacts on MR Connect. The activity log will show you who is using your MR Connect and how often they access it.

1. Set parameters

1. **Connect > Activity Log**
2. In the **Search By** pane, change search filters as needed:
   - **Site**
     Defaults to your main site.
   - **Type**
     Leave as Contact.
   - ***Activity Date From/*Activity Date To**
     Required. Defaults to the current month. To change the dates, see Date Navigator.

2. View results

1. Click . MR9 displays a snapshot of web activities that meet the specified search condition(s), broken down into quarter-, year-to-date, and grand totals.
2. To view details, click **Expand/Collapse >**
   - **Expand Firm**
     Firms expand to display amounts by contacts in each firm.
   - **Expand Date**
     Yearly grouping(s) expand to display amounts by quarters and months.
   - See Using interactive reports for more information.

3. Export/print results

To export and save the results, click **> Export to Excel.** See Exporting & printing results.

Reference

- MR Connect
- Date Navigator

Step-by-step instructions

- Using interactive reports
- Exporting & printing results

User Guide

This interactive manual can be accessed through the Help menu in the main MR9 navigation, through the Help button on the window of an MR9 function, or from the OMTI website.

Step-by-step instructions

- Accessing the user guide

Online Training

Online training videos available on our website in the Help Center are also accessible within MR9 under the Help menu. In the Help Center, you can access other MR9 training materials including step-by-step tutorials and cheat sheets.

Reference

- omti.com/mr/resources/help-center/videos

Update History

Update History lists every update made to MR9, grouped by its release date.

Step-by-step instructions

- Viewing MR9 updates

FAQ/KnowledgeBase

Find answers to common questions about MR9 and MR Connect. Articles in **FAQ/KnowledgeBase** include step-by-step tutorials for many functions as well as solutions to error messages and other problems.

Step-by-step instructions

- Finding answers to your MR9 questions

Online Support

When needed, OMTI support staff can remotely view what is happening on your screen and solve problems in your MR9 using one of our remote control apps.

Reference

- Team Viewer

Step-by-step instructions

- Using Team Viewer

Live Chat

Live Chat allows you to communicate with OMTI Support technicians via instant messaging.

Step-by-step instructions

- Live chatting with OMTI Support

Report Issues

Ask questions about MR9 and get answers from MR Support while maintaining a paper trail of your issues.

Step-by-step instructions

- Reporting issues

Suggest Ideas

Suggest Ideas allows you to submit your suggestions for improving MR9 and respond to other users' suggestions.

Step-by-step instructions

- Searching ideas
- Commenting on and voting for ideas
- Suggesting ideas

About

Select **About** in the Help menu to see the current version number of your MR9 software, plus links to our website and support team.

Team Viewer

Team Viewer is an all-platform support system that allows our technicians with your consent to remotely control your device to solve issues you are having with MR9.

Step-by-step instructions

- Using Team Viewer

Accessing the user guide

Access the user guide when you need it in several ways:

- **Help menu**

  1. To access the user guide from its table of contents, click **Help > User Guide** in MR9.
  2. The user guide opens in its own tab in your browser. Click any hyperlink to go to the related areas of the guide.

- **Help button**

  To jump to the section of the manual that is relevant to the function you are currently using in MR9, click **Help** in the header of the function window.

- **OMTI website**

  To access the user guide outside MR9, visit omti.com.

- **PDF version**

  Visit the Downloads page of the MetaRecords side of omti.com.

Viewing MR9 updates

View what was included in every MR9 update release. Print out or save as PDF any release listing.

1. **Help > Update History**
2. To view an update release list, click its release number.
3. MR9 displays the list of updates included in the release in the results pane.
4. To print or save as a PDF, click **Print.** Then, depending on your browser, choose **Print** or a PDF option in your browser's print popup.

Reference

- PDF

Finding answers to your MR9 questions

Locate and read articles about different aspects of your MR9 system organized by the main areas of MR9 and MR Connect.

1. **Help > FAQ/KnowledgeBase**
2. In the left pane of the FAQ/KnowledgeBase window, click the name of the module or other category you are looking for information about.
3. In the right pane, MR9 lists all articles related to the area selected. Each article in the list includes an excerpt to help you located the information you are looking for. Click an article's hyperlinked **KB No.** to read the entire article.
4. In the View FAQ/KnowledgeBase window, the full article appears including screenshots and other images. If you want to share the article, click **Send Email.**
5. The title of the KB article auto-populates the email's subject line and the complete article appears along with the email signature from your user preferences in the message You can update the email and attach files if desired. See Composing emails.
6. Click **Close.**

Step-by-step instructions

- Composing emails

Using Team Viewer

Team Viewer is an executable file that allows OMTI support technicians to remotely view and control your device to solve MR9 issues.

1. If you need our help resolving an issue with MR9, contact OMTI Support via phone or Live Chat.
2. If the support technician determines that they need to see what you are seeing on your screen and work with your MR9 on your device using Team Viewer, click **Help > Online Support > Team Viewer.**
3. The file will download to your device. Follow the technician's instructions for installing and using Team Viewer to resolve your issue.

Reference

- Live Chat

Live chatting with OMTI Support

In addition to calling OMTI Support during our office hours for help with MR9, you can chat with our technicians online.

1. To communicate with a technician via instant messaging, click **Help > Live Chat.**
2. Live Chat opens in a new tab/window in your browser. Enter your question/issue in the **Question** field, then click **Start Chat.**
3. The chat window opens with a wait message in the top pane and your number in the queue at the bottom of the window. When an OMTI technician responds, their reply appears in the top pane. Enter your message in the bottom pane and click **Send** to reply.
4. Continue the conversation until your issue has been resolved, then close the Live Chat browser tab/window.

Reporting issues

Ask questions and make requests online with support tickets. After making an inquiry, you can track its progress and continue the discussion with us online.

1. **Help > Report Issues**
2. In the Report Issues window, any unresolved inquiries are listed (see Following up on issues). To start a new ticket, click **New.**
3. In the New Issue window, enter the following information:
   - ***Problem/Issue**

     Required. A descriptive title for your inquiry will make it easier to track if you have multiple inquiries.
   - ***Detail**

     Required. A detailed description will help us understand your inquiry and resolve it sooner. If you want to format your description, or add hyperlinks and images, see Customizing emails, messages & web pages.
4. Click **Save.** Your report is issued a ticket number and placed in your queue.
5. To see answers and respond, see Following up on issues. To close the ticket, see Closing tickets.

Step-by-step instructions

- Following up on issues
- Customizing emails, messages & web pages
- Closing tickets

Searching ideas

Find out what other MR9 users are suggesting. Add your input on these ideas and vote for ideas you would like to see implemented. Monitor how your submitted suggestions are doing.

1. **Help > Suggest Ideas**

2. In the Suggest Ideas window, click to see all ideas that have been submitted except ideas that have been resolved or rejected by OMTI's development team. Or use the search filters to restrict results before clicking :

   - **Requested By**
     - **ALL:** Default. To see ideas submitted by the whole MR9 community.
     - **My Ideas:** To see only your submittted ideas.
     - **My Company Ideas:** To see only those ideas that were submitted by you and your coworkers.
   - **Status**

     Where the idea is in the development process. Default is all statuses except Resolved and Rejected. Click to change the search to one or more specific statuses. See Lookup panel.
     - **Acknowledged** – OMTI Development Team has read the suggestion and is considering it.
     - **In Development** – OMTI Development Team has accepted the suggestion and is working on implementing it in a future version of MR9.
     - **New** – Suggestion has been submitted.
     - **Resolved** – Suggestion has been implemented in MR9.
     - **Rejected** – Suggestion will not be implemented in MR9.
     - **Waiting for Response** – OMTI Development Team needs further input from the user. User should check the idea's threads and respond to the team's questions.
   - **Module**

     Main areas of MR9 and MR Connect. Default is ALL. Click ▾ to select a single module.
   - **Function**

     Activities in MR9 and MR Connect. Default is ALL. If you selected a module above,

then ALL is restricted to all functions within that module. Click ▾ to select a single function in the selected module.

- **Idea No.**

  To look up a specific idea by number, enter the entire number.

- **Title**

  To look up ideas by title, enter all or part of a title (minimum 3 characters).

3. MR9 lists all ideas that fit your search criteria. It includes each idea's title and description, category, current status, how many votes it has gotten, and when it was last commented on. To view more details about an idea including its comment thread, click its hyperlinked **Idea No.** You can also comment on and vote for the idea. See Commenting on and voting for ideas.

Reference

- Lookup panel

Step-by-step instructions

- Suggesting ideas
- Commenting on and voting for ideas

Notifications and Messages

Notifications and Messages handles MR9 system notifications and messages from other MR9 users in a format similar to an internal email system.

Step-by-step instructions

- Communicating within MR9

Change Password

When you are first given access to MR9, you are issued a password. You can change this password at any time.

Reference

- Strong password

Step-by-step instructions

- Updating your password

Locked Data

To prevent two or more people from working on the same data at the same time and overwriting each other's work when they save, MR9 "locks" data when someone accesses it so that only that person can edit it until they save, cancel, or close the data window. You can release a lock to switch access.

Step-by-step instructions

- Managing locked data

User preferences

In addition to system-wide preferences that are the same for all users of your MR9 system, you can also set your own user preferences that customize your experience in MR9.

Step-by-step instructions

- Setting personal preferences

Close All Tabs

If you have too many tabs open, you can close them all at once with this function.

Step-by-step instructions

- Closing tabs

Log Out

MR9 automatically logs you out after a certain period of inactivity for security reasons. You can also manually log out of MR9 — for example, when you want to switch to working on a different computer or are finished working for the day.

IMPORTANT: Save your work

Be sure to save your work before logging out: MR9 does not automatically save your work for you.

Step-by-step instructions

- Logging out of MR9

Communicating within MR9

In Notifications and Messages, you can:

- Receive automatic notices and alerts from the system.
- Exchange messages with others within your MR9 system.
- Send messages to pre-determined groups of MR9 users (see Managing groups).
- Send yourself reminders about important tasks, such as collections follow-up calls.

NOTE: Works like email but is not email

Notifications and Messages is not an email system; you can only exchange messages with other MR9 users in your company.

Access messages

There are 2 ways to access Notifications and Messages:

- When a message arrives, MR9 displays an alert dialog box in the notification area of your browser. Click the alert box to open Notifications and Messages.
- To check messages anytime, click **[your name on the screen]** **> Notifications and Messages.**

In the Notifications and Messages window, message directories are listed in the left pane. If there are any unread messages in the Inbox, the number is listed there.

By default, Inbox messages are listed in the results pane, starting from most recently received.

- Priority messages are marked with .

  NOTE: Rush order notifications are automatically designated as priority messages

  Automated notices from MR9 about Rush orders are treated as priority messages. Their Subject lines are also displayed in red.

- Unread messages are marked with .
- Update the message list by clicking **Refresh.**
- You can access other message directories listed in the left pane by clicking them.

TIP: Reminders are denoted with dates

So that you do not have to open each message to see if it's a reminder, messages that are reminders have the date they were set displayed in the **Remind** column.

Read messages

In the Notifications and Messages' results pane, click the hyperlinked **Subject** line of a message to read the message in the View Message window.

- ## Reply or forward messages

  To reply to a received message or send the message to other MR9 users, see Sending messages.

- ## Delete the message

  You can delete messages 2 ways:

  - **To delete one message or multiple messages at once:** In the Notifications and Messages window, check the box(es) of message(s) you want to delete, then click **Delete.** In the popup that appears, click **Yes.**
  - **To delete a single message after viewing:** In the View Message window of a message you want to delete, click **Delete.** In the popup that appears, click **Yes.**

  Messages are moved to the **Trash** folder. The system will automatically delete messages from the **Trash** folder in the number of days set in System Preferences > General > Notifications and Messages.

  To delete them from the system immediately, click the **Trash** folder, check the box(es) of message(s) you want to delete, then click **Delete.** In the popup that appears, click **Yes.**

Reference

- Users
- Message Groups
- Notifications and Messages preferences

Step-by-step instructions

- Managing groups
- Sending messages

Updating your password

You can change your MR9 password at any time. We recommend using strong passwords for better security.

1. Enter your current password

1. Click **[your name on the screen]** **> Change Password.**
2. In the **Change Password** popup, enter your password or select it from the dropdown in ***Current Password** *(required).*

2. Create a new password

1. Enter your new password in both ***New Password** and ***Confirm New Password** *(required).*
2. Click **Save.**

NOTE: Best business practices for passwords

It is good business practice to change your assigned password to a strong password that only you know, and also to change it periodically. Once you change your password, no one else will know it nor can it be retrieved from the system.

TIP: Forgotten/no password

If you don't have a password or forgot your password, you can set it from the log-in screen. See Setting your password at log-in.

Reference

- Strong password

Step-by-step instructions

- Setting your password at log-in

Managing locked data

When you attempt to access data that another user is already accessing, you can view the data but it is "locked." If you attempt to edit the locked data, MR9 displays a popup that tells you the data is currently being edited and identifies who is editing it. You can override a lock to access the data, although this also overrides anything the other user has entered but not saved yet.

1. If you receive a popup message that someone else is currently editing data that you also want to edit, click **OK** in the popup, then click **[your name on the screen]** **> Locked Data.**

2. In the Locked Data window, click **Refresh** to see if the data lock has been released by the other user.

3. If the data is still locked, you have 3 options:

   - Click **> Release Lock,** then click **Yes** in the popup to force release the data lock. This immediately releases the lock and overrides the other user's data input without warning.
   - Wait and try again later.
   - Contact the other person to save their work and "unlock" the data.

Setting personal preferences

Customize what your MR9 windows and emails look like and what information your defaults are. Preferences entered here are your own vs. System Preferences which are the same across the entire MR9 database. Choose which functions you'd like to open automatically each time you log in.

1. **[Your name on the screen] > User Preferences**
2. In the User Preferences window, scroll or jump to a pane to enter your personal preferences:

My Profile section

First Name, Mi., Last Name

Update your given name, middle name, and family name in these fields.

*Full Name

Required. MR9 generates several iterations based on the names in **First Name, Mi.,** and **Last Name.** Click ▾ and select one of the options that appear OR edit the text in the **Full Name** field directly.

IMPORTANT: Save your work before updating your name

When you click **Save,** a popup will appear warning that your browser will refresh and you will lose any unsaved changes in other open MR9 tabs. Click **No** to go back and save your data, or click **Yes** to proceed.

Email

Enter your preferred email address.

General

*Default Business Unit

Required. Select a BU in the dropdown that you will use most often when setting new orders and billing orders. (BUs are set up in Business Units.)

Default row count for grid

Select a default from the dropdown for how many rows to display in result grids. Higher row counts will cause results to take longer loading.

Use Dark Mode

Default is No. Slide to Yes to set your MR9 windows to reverse/light on dark mode. When you click **Save,** a popup will appear warning that your browser will

refresh and you will lose any unsaved changes in other open MR9 tabs. Click **No** to go back and save your data, or click **Yes** to proceed.

- ## Notifications and Messages

  ### Period to check for new messages

  Default is to have MR9 check every five minutes for new messages in your Notifications and Messages function. You can turn off this feature or set it to a specific number of minutes in the dropdown.

  ### Forward carbon copy messages to my email

  Slide to Yes to have MR9 messages also sent to your email address so you can keep on top of internal correspondence even when not logged in. Hyperlinks in forwarded messages will not work, and reminder messages from MR9 are not forwarded.

- ## Reports

  ### *Business Unit to be displayed on Report Header

  Required. Business unit information is displayed on all MR9 reports. Select the BU you want to appear on your reports in the dropdown. You can select a different BU from your default BU if desired.

- ## Email Subscriptions

  - ### New Idea Suggestions

    Slide to Yes to subscribe to automatic new idea notification emails generated in Suggest Ideas. Slide to No to unsubscribe.

  - ### Product Newsletter

    Slide to Yes to subscribe to the MR9 newsletter. Slide to No to unsubscribe.

  - ### Product Update Notification

    Slide to Yes to subscribe to MR9 update notifications. Slide to No to unsubscribe.

- ## Payment Credit Cards

  To add credit card(s) for paying custodian fees, click . In the **New Credit Card** panel, enter the card number in ***Credit Card No.,** then click **Save >**

  - **Save & New** – To add another card without leaving the **New Credit Card** panel.
  - **Save & Close** – If you have no more cards to add.

  To remove a card from the list, check its box and click .

- **Email**

  Define different settings for your email than what the rest of the office is using.

  - **Outgoing Email Method**

    Default is Use System Preferences, which will use MR9 system-wide preferences set in System Preferences > General. To customize email preferences, select Use Personal Setting in the dropdown, then click . See Customizing email preferences.

  - **Show mail composer**

    If you like to review your emails before sending them, slide to Yes.

  NOTE: Edit existing email settings

  If you entered email settings previously, they will appear in the grid at the bottom of the Email pane. To update any of these settings, click the hyperlinked **Sender's Email.** See Customizing email preferences.

- **Startup Functions**

  Select up to 5 MR9 functions that will open automatically when you log in.

  1. In the first **Function 1** dropdown select the MR9 module of the function you want.
  2. In the second **Function 1** dropdown select the function.
  3. Repeat steps 1 & 2 for each function you want to have opened whenever you log in.

  To remove a function from the list click next to the function name.

3. In the User Preferences window, click **Save.**

Reference

- Business Units
- Notifications and Messages
- System Preferences > General

Step-by-step instructions

- Sending messages
- Customizing email preferences

Closing tabs

Every time you log out of MR9, MR9 automatically closes all open tabs (MR9 functions). However, while working in MR9, all functions you open stay open unless you specifically close them by either:

- Clicking **Close** in each window's upper right corner.
- Clicking the **X** on the right side of each window's tab.
- Clicking **[your name on the screen]** **> Close All Tabs.**

Logging out of MR9

While MR9 will automatically log you out after a certain period of inactivity for security reasons, you can also log out of MR9 at any time.

1. Click **[your name on the screen]** **> Log Out.**

2. In the popup that appears, click **Yes.**

IMPORTANT: Save your work

Be sure to save your work before logging out: MR9 does not automatically save your work for you when logging out.

Accounting Basics

Although MR9 is not a general accounting system, having some basic accounting knowledge will help you to understand its reports and business workflows.

- Five basic accounts
- The accounting equation
- Debits and credits

Setting your password at log-in

If you don't have a password or forgot your password, you can set a new one from MR9's Log-in page.

1. On the MR9 Log-in page, click **Forgot Password.**
2. On the Forgot Password web page, enter your **Login Email** or **Login Name.**
3. In the ***Type the code from the image** field, enter the characters that appear above the field. If you are having difficulty recognizing the characters:
   - Click to hear the characters pronounced.
   - Click to see a different set of characters.
4. Click **Submit.** In the popup that appears, click **OK.**
5. If your log-in name is in the system, MR9 will send you an email. Click the link in the email to go to the Reset Password page. You have 24 hours from the time you submitted your request to click the link.
6. On the Reset Password page, enter a strong password in ***New Password** and ***Confirm New Password** *(both required),* then click **Submit.**

TIP: Avoid account lock-outs

If you attempt to log into MR9 with an incorrect password too many times, MR9 will lock you out of the system. The only way to unlock your account is to contact an administrator. Instead of going through this hassle, use **Forgot Password** to set a new password and avoid being locked out of your MR9 account.

NOTE: Changing your credentials

You might not be able to change your assigned user login name (based on your company's MR9 setup) but you can change your password at any time.

Reference

- Strong password

Step-by-step instructions

- Updating your password
- Unlocking user accounts

Verifying your device

If you are signing into MR9 on a device for the first time or on a non-"trusted" device, e.g., a public computer, you might be asked to verify the device before you can access MR9 using two-factor authentication (2FA).

Continued from Logging into MR9.

1. If the Request Verification Code screen appears, click the radio button for where you want your verification code sent (e.g., email address or mobile phone), then click **Request.**
2. Copy the code in the message sent from MR9 your messages for the code, copy the code.
3. Paste the code in MR9's Verification Code screen. You have 5 minutes from when you requested a code to enter the code. If you miss the deadline, repeat these steps again. If you did not receive a message with a code, click **Didn't Get a Code** and follow the instructions.
4. Depending on the device:
   - **If this is a device that you want to sign in on without entering a verification code each time** – leave **Remember this browser as trusted browser** checked and press **Enter** or **click OK.**
   - **If you are logging in on a public device or a device you want to verify each time** – uncheck the box. Click **OK.**
5. The main MR9 web page appears.

IMPORTANT: Do you trust this device?

If you use MR9 on a public machine — for example a shared device or a computer in a public library — remember to uncheck the **Remember this browser as trusted browser** checkbox. If you leave it checked, the browser will be registered as trusted browser, and MR9 will not ask for two-factor authentication again within 2 years unless you delete the browser's cookie manually.

Reference

- Two-factor authentication (2FA)

Step-by-step instructions

- Logging into MR9

Two-factor authentication

Two-factor authentication (2FA) is a way to more securely confirm a user's identity by adding a second factor to signing in with a user name and password. In MR9, 2FA uses a verification code that is sent to the user's email address or mobile device, which the user then enters into MR9 during sign-in to confirm their identity.

Reference

- Login preferences (MR9)

Step-by-step instructions

- Verifying your device
- Logging into MR9

Strong password

For a password to be strong, it should:

- Be at least eight characters long.
- Contain characters from each of: upper-case letters, lower-case letters, numerals, and symbols.
- Not contain your name, login name, or birthday.
- Not contain 3 or more characters in sequence (e.g., 123 or abc).

Reference

- Login preferences (MR9)
- Login preferences (MR Connect)

Step-by-step instructions

- Creating user accounts
- Resetting passwords
- Updating your password
- Setting your password at log-in

Lookup panel

Some sub-functions or panes within windows have their own search capability called Lookup. When you click next to a field in MR9, a Lookup panel appears. Depending on the field, the Lookup panel's search function is:

- ## Lookup list

  List of options related to the field. Default is usually ALL. You can select single or multiple items:

  - **Click the Lookup panel's title box** to select all items/clear all checkmarks at once.
  - **Click individual list items' boxes** to select/clear them.

- ## Lookup search filter

  Two-step search function:

  1. ### Search By

     Select a search option in the dropdown.

  2. ### Search Criteria

     Depending on the function, you either:

     - **Enter text in the field** to search for in the database. You must enter at least 3 consecutive characters in a search field. To find all listings, type %%%.
     - **Click in the field,** then select from the dropdown list. Repeat to select more than one filter to search with. Click **X** to delete a filter.

     #### TIP: More search filter info

     For instructions for specific Lookup search filters, see Looking up contacts, Looking up firms, and Looking up locations.

  3. ### Show Active Only

     If this option appears, leave as default Yes to restrict results to active entries only. Or slide to No to show all results that match your search critera.

- ## View results

  1. Click:

     - **OK** in lists.
     - in search filters to see entries that match your search criteria. Then click the hyperlinked choice in the results grid to select it.

2. Back in the **Search By** pane, click to use the search criteria selected in the Lookup panel.

Reference

- Search By pane
- Results pane

Step-by-step instructions

- Searching in MR9
- Looking up contacts
- Looking up firms
- Looking up locations

Search By pane

Most main functions in MR9 include a Search By pane that contains multiple filters to restrict a search.

In most cases, you must set at least one filter in a Search By pane before clicking . Any filters marked with a red asterisk (*) must have an entry.

Search filters:

- **Text-entry fields**

  Blank fields with white backgrounds are data-entry fields that you can enter text into directly to search. You can enter full or partial words to search (minimum of 3 characters).

  NOTE: MR9 finds exact and similar possible text matches

  MR9 uses similarity search logic so search results include entries that are not exact matches of the searched term in addition to any exact matches. For example, if you searched for "Angela Smith" MR9 would include entries such as "Angela J. Smith" and "Angela Wurtsmith" because MR9 compares your search terms to possible words made up of the entered characters and numbers.

  TIP: View all entries in a table

  To view all entries in an MR9 table, enter 3 percentage signs (%%%) in a text field filter for that table.

- **Dropdown lists**

  MR9 displays a default option. Click the field's ▾ to select a different option in the dropdown.

- **Date Navigator**

  Click a date field's to set a date using MR9's perpetual calendar. See Entering dates.

- **Grayed-out fields**

  You cannot type any text in these fields. Instead, click its icon (or) to change the information displayed or to delete it. See **Dropdown lists** above or Lookup panels.

- **Multiple search criteria**

  You can apply search filters either one at a time or in combination with each other.

- **Clear search criteria**

  To clear all search criteria at once, close the function window, then re-open it.

Reference

- Date Navigator
- Lookup panel
- Results pane

Step-by-step instructions

- Searching in MR9
- Entering dates & times

Results pane

When you search for information in MR9, it usually presents the information in the results pane as a grid, divided into horizontal rows and vertical columns.

The first row (bold text on color background) is always the heading row. It contains labels that explain the contents of the columns. If the results include a grand totals line at the bottom of the pane, it also displays with bold text on a color background.

The rest of the results display in rows of alternating background colors (white and gray) for better viewing of separate line data.

A directional arrow appears next to the column header for the variable that the results are being sorted by. The default up arrow indicates the results are listed oldest to newest/smallest to largest.

- **Locked columns**

  In some results panes, the leftmost columns up to the one that contains hyperlinked entries remain visible when scrolling to the right in the results grid. Locked columns are designated by a doubly thick right border.

- **Custom grid layout**

  In some results panes, designated by a button in the bottom right corner, you can:

  - Hide or show any column.
  - Rearrange the column order.
  - Stretch or shrink column widths.
  - Designate which column to sort results by in ascending or descending order.
  - Choose which columns are locked (i.e., you want to always be visible when scrolling through the results).
  - Save your custom grid layout or return to the default layout.

  See Customizing grids.

- **Interactive reports**

  Unlike most results grids in MR9, interactive reports do not look like other grids and are manipulated differently. Interactive reports have initial overviews which you can then drill down into for more details by clicking column and row headers. See Using interactive reports.

- **Record Navigator**

  When the results of a search are too numerous to fit in one page, use the Records

Navigator at the lower left of the results page to locate the record you want.

- **Arrow keys**

  Use ◀ and ▶ to page back and forth through the results.

- **Skip arrow keys**

  Use |◀ and ▶| to go to the first or last page.

- **Items per page**

  Select a number in the dropdown to limit the number of entries displayed per page.

  The lower right side of the pane lists the number of entries in the returned results.

- **Static reports**

  Some information in MR9 is better in a format that is print friendly first, generally information that you are distributing to third parties, such as clients and your accountant. This information is formatted in MR9 as static reports that you can easily distribute either as a printed handout or an emailed PDF. These reports are uneditable and non-adjustable but can be exported in a variety of formats and printed directly from within MR9. See Printing invoices, statements, & reports.

- **Adjust grid**

  In all results panes except interactive reports and static reports, you can sort the grid rows in ascending or desending order and resize column widths to view results better. Adjustments are temporary unless you are adjusting a customizable grid and save the results. See Sorting rows, Resizing columns and Customizing grids.

- **Select results**

  In any results pane with a checkbox column for selecting listings, you can:

  - Check one or more boxes to select them.
  - Check the first box in a series then Shift + Click the last box in the series to select a range of boxes at once.
  - Check the box in the header to select all.
  - Click any checked box to de-select it.

- **Export/print results**

  Any results pane with a or button in the bottom right corner can be exported to save, use in other applications, or print. See Exporting & printing results.

Reference

- Search By pane
- Lookup panel

Step-by-step instructions

- Customizing grids
- Using interactive reports
- Printing invoices, statements, & reports
- Sorting rows
- Resizing columns
- Accessing results
- Exporting & printing results
- Searching in MR9

Customizing grids

You can can customize grid layouts in some functions. If a grid's layout is customizable, it has a button in the bottom right corner. Your grid customizations will not affect other users; they are local to your account, not system-wide changes. If you save a customized grid layout, the grid will always appear with that layout until you change it.

1. Arrange grid layout

In any function that has a customizable grid, to:

- ### Rearrange columns

  If a column header includes , you can click and drag to it to where you want the column to appear in the grid.

- ### Resize column widths

  Move the cursor to the right border of the column header. When the cursor changes to a horizontal double arrow, click and drag (in either direction) to stretch or shrink the column width.

- ### Change row order sorting

  Either:

  - **Click a column header** to select it as the sorting column. The column will sort the rows in ascending order and an up arrow will appear in the column header. Click the header again to change to sorting in descending order with a downward arrow in the header marking the column.

  - **Click > Sort Ascending/Sort Descending** in a column header to designate it as the sorting column. The column will sort in the direction chosen and the corresponding arrow will appear in the header to mark the column.

  #### TIP: Sort by multiple columns

  To sort rows by multiple columns, click the column you want as the first sort variable, then Ctrl-click (Windows OS) or command-click (Mac OS) to select the second sort variable. MR9 numbers the sort indicators for your reference. You can select as many columns to sort by as you wish. To toggle the sorting order of a column within the selected set, click the column header while holding down the Ctrl/command key. To disable multiple column sorting, click any column header.

- ### Show/hide columns

  Click **> Columns,** then uncheck the boxes of any columns you don't want to appear. To show a previously hidden column, check its box.

- ### Set sticky columns

  You can designate up to 10 columns on the left of the grid that do not move when scrolling a long grid. These sticky columns are marked by a doubly thick right border.

  - **To set a sticky column:** If the column is not already the left-most non-sticky column, first click its header and drag the column to that position. Click **> Set Column Position > Stick Column.**
  - **To un-stick a sticky column:** Click **> Set Column Position > Unstick Column.** If there are more than one sticky columns, only the right-most column can be unstuck.

  You cannot rearrange the order of sticky columns, so you must "stick" them in the order you want them to appear.

2. ## Save grid layout

   To save your customized grid layout, click **> Save Grid Layout.** Then click **Yes** in the popup that appears.

TIP: Return a function to factory order

If you later want to return the order of the columns in a function to the original setup, click **> Load default Grid Layout.**

NOTE: You cannot save custom grids in IE11

While you can customize grids in Internet Explorer 11, it does not save your customizations. If you want to customize grids in MR9, you must use one of the other approved browsers (Google Chrome, Safari, Firefox, or Microsoft Edge).

Reference

- Results pane

Grouping results

If the data grid in the results pane allows grouping, you can divide the rows into groups you designate to make it easier to see relevant related information in complicated results grids. Groups include subtotals and averages for the results in their group.

Currently only Tracking, Orders in Progress and Processed Orders allow grouping. You can add multiple criteria to group by, arrange the grouping order, and delete any grouping criteria. For example, group Processed Orders by Processor, then Part Status to see all the records each processor is responsible for and what the stage each record is in. Switch the 2 parameters to group by status then processor to see records listed by the stage they are in, then further grouped by each processor in each stage. Each group and sub-group will have their own total counts displayed in their header.

Your grouping set-up will not affect other users — it is local to your account, not a system-wide change. You can save it to use again or revert to the original results display.

1. To change the grouping parameters, click **> Show Grouping Zone.** An additional header appears at the top of the results grid with any parameters that are being used to group the results listed.

2. To add another grouping parameter, click and drag a column header you want to group by to the grouping zone. The results will automatically re-group to include the new parameter. You can have an unlimited number of grouping parameters.

3. You can refine your grouping set-up. To:

   - **Re-arrange grouping order**
     Click and drag parameters in the grouping zone to arrange grouping order as desired.

   - **Sort grouping order**

     Click a grouping parameter to toggle its appearance between ascending and descending order.

   - **Delete a grouping parameter**

     Click a grouping parameter's X to remove it from the grouping zone

4. Within the grouped results, you can also hide or show any column, rearrange the column order, stretch or shrink column widths, designate which column to sort results by in ascending or descending order, and choose which columns you want to always be visible when scrolling through the results. See Customizing grids.

5. You can save your custom grid layout or return to the default layout:

   - **Click** **> Save Grid Layout:** MR9 will remember your set-up the next time you access the function.

- **Click** **> Load Default Grid Layout:** MR9 will revert to the original layout and clear the results grid.

6. When you have finished setting up your grouping parameters, click **> Hide Grouping Zone** to remove the top header from the pane. Hiding the grouping zone will not change your grouping set-up.

Reference

- Results pane
- Tracking
- Orders in Progress
- Processed Orders

Step-by-step instructions

- Customizing grids

Exporting & printing results

While you can use your browser's print function to print screens from MR9, use MR9's export function if you want to:

- Save information from a search.
- Create a report from search results.
- Print the information in a single pane or panel.

Use the export function to export the data to *Excel* or as a CSV (Comma-Separated Values) file to open in other applications instead. Some functions, such as Invoice Inquiry, include a Totals line in exported results.

Any pane or panel that has or in lower right corner can be exported/printed/saved by clicking the icon.

- ## To export results

  Click or >

  - **Export to Excel** – To generate an *Excel* file.
  - **Export to CSV (Comma-Separated Values)** – To generate a generic file to use in *Excel* or other applications.

  MR9 will automatically create a file in the format selected and download it to your device.

- ## To print results

  Click **or** **> Export to Excel.** You can clean up the results in *Excel* as desired, then print from there.

- ## To save results

  Each time you export, MR9 automatically creates a file with a generic name based on the function you exported from and saves it in your Downloads folder. To ensure that you can find the results later, rename the file to something more meaningful and move the file to a folder you designate for the purpose of storing these types of files.

NOTE: Report exporting and printing

MR9-generated reports, as opposed to search results, do not have or in the lower right corner of the pane. See Printing invoices, statements, & reports.

Reference

- Microsoft Excel

Step-by-step instructions

- Printing invoices, statements, & reports

Merging data

If you no longer need a particular entry, such as a list option, business unit, service item, firm, contact, or location — but want to keep its historical data — you can merge it into an existing entry of the same data type.

1. Select entry to remove

1. In a results pane, select the entry that you no longer want to see in your MR9 database but whose historical data you want to keep.
2. In its View window, click **Edit.**
3. In its Edit window, click **Merge To.** (In some screens the option is **More > Merge To**.) If an entry is required by MR9, the **Merge To** option will be grayed out.

2. Select entry to merge into

1. In the **Merge To** panel, find and select the entry that you want to add the removed entry's historical data to. See Searching in MR9.
2. Click **Merge.**
3. In the popup that appears, click **Yes.**

CAUTION: Not all historical data is saved in a merge

Be careful when merging entries because not all data is saved when 2 entries are merged, and the merging entry is deleted from your MR9 database. Information that is retained depends on what data type you are merging, so some information will be lost in a merge. See Historical data saved in a merge.

Reference

- Historical data saved in a merge
- Lists
- Business Unit
- Service Item
- Firm
- Contact
- Location

Step-by-step instructions

- Searching in MR9
- Looking up firms
- Looking up contacts
- Looking up locations

Using interactive reports

Unlike most results grids in MR9, interactive reports do not look like other grids and are manipulated differently. Interactive reports have initial summary views which you can then drill down into for more details by clicking column and row headers.

Some functions offer both static and interactive reports, so you can view/use the information in the best way for your purpose.

In all interactive reports, MR9 displays a snapshot of the relevant data in a selected time frame. Years are displayed in the column headers, and the type of data being searched, such as clients, are listed in rows.

If there are multiple data points for the report, such as in the Order Analysis report where it tracks scheduled and canceled orders, each year is further broken down into subheaders, in this case scheduled orders, canceled orders, and net orders.

If data types have subgroups, they sometimes will include subtotals for the subgroups when viewing the reports in the detailed or expanded view.

Grand totals are included for each row and column in the report grid.

1. To view more details in an interactive report, click:

   - ⊕ **next to a date header to see a breakdown by month.**

     If you selected the option to show quarterly details when setting up your search criteria for the report, clicking + next to the year reveals the breakdown by quarter. Clicking the quarter would reveal the monthly breakdowns within the quarter.

   - ⊕ **next to a row header to see the next level of the row's details.** For example clicking + next to a firm name would open out a list of contacts at the firm and break down the firm data displayed to the contact level.

   - If you want to see all details at once in a report, click **Expand/Collapse >**

     - **Expand Date** – to see all monthly breakdowns.

     - **Expand [relevant row header]** – to see results broken down by all row subheaders.

2. If you want to quickly return to the initial view, click **Expand/Collapse > Collapse Date** and **Expand/Collapse > Collapse [relevant row header].**

   You can also click the ⊖ next to individual headers to close their subheaders.

Reference

- Results pane
- Order Analysis
- Client Analysis

- Reward Points Analysis
- Business Analysis
- Tracking Productivity Analysis
- Activity Log

Step-by-step instructions

- Knowing who is calling
- Summarizing client activity
- Analyzing point activity
- Analyzing your business
- Analyzing tracking productivity
- Tracking MR Connect activities

Date Navigator

Every date field in MR9 has a perpetual calendar, called **Date Navigator,** accessed by clicking 📅. It provides a quick and easy way to add or change dates instead of manually entering dates.

Reference

- Search By pane

Step-by-step instructions

- Entering dates & times

Emailing from MR9

You can email contacts, locations, and other MR9 users from within MR9. Customize the email contents and include attachments. Send individual emails or send them in batches.

Continued from Notifying runners (field agents), Previewing invoices, Viewing & sending single invoices, Sending & archiving invoices in batches, Working with COD invoices, Sending receipts for payments, Sending monthly statements, Viewing client activity

1. Compose email

In the **Options** popup, some or all of these options appear. You can:

- **Change to a different form:** Select different options from the **Form Group** and **Form** drop-downs to locate the form you want to use.
- **Preview/edit the email(s):** Slide **Show mail composer** to Yes. You can also add/delete attachments to the email(s). See Composing emails.
- **Send from a different address:** Select an address in the **From** drop-down if you don't want to send the email from default address shown. (Email addresses and the default are set in System Preferences > General > Email.)
- **Send from a different Connect site:** If you have more than one MR Connect website, you can change which one the email comes from by selecting a site in the **Connect Site** dropdown.
- **Use a different email template:** Select a different template for the email from the default by selecting one in the **Email Template** dropdown. (Email templates and the default are set in System Preferences. See Customizing communications.)

2. Send email

1. Click **OK.** If you set **Show mail composer** to Yes, see Composing emails.
2. If an "operation successful" popup appears, click **OK.** If sending emails from a results grid, MR9 will post a status message, "Email sent successfully," in the Result column.

NOTE: MR9 is not an email program

MR9 does not keep copies of all emails sent from within the system. To see which emails are logged in the system, see Viewing email logs.

If you want to keep copies of all of your emails sent from MR9, enter your email address in the **Bcc Emails** field in your personal User Preferences window's **Email** pane. See Customizing email preferences.

Reference

- Mail Composer
- General Email preferences

Step-by-step instructions

- Notifying runners (field agents)
- Previewing invoices
- Viewing & sending single invoices
- Sending & archiving invoices in batches
- Working with COD invoices
- Sending receipts for payments
- Sending monthly statements
- Viewing client activity
- Composing emails
- Customizing communications
- Viewing email logs
- Customizing email preferences

Composing emails

Add/edit email contents and include attachments in MR9's mail composer.

Continued from Emailing from MR9, Entering general contact information, Entering general location information, Adding parties to orders, Alerting clients, Finding overdue invoices, Sending collection letters, and Managing tags.

1. Compose email

In the **Email** panel:

- ***From**

  Required. Your default email address appears. To change the email address you are sending from, select a different address in the dropdown. (Email addresses and default are set in System Preferences > General > Email or User Preferences.)

- ***To**

  Required. Depending on the function you are in, this field might show the recipient's address. Addresses that automatically populate come from the entity's **General** pane or **Notification Email** pane (see Managing notification emails). You can change the recipient or if the field is blank, enter an email address.

- ***Subject**

  Required. Enter or edit the text that will appear in the email's subject line if needed.

- **Important**

  Default is No. Slide to Yes to have the email display an Important flag in the recipient's inbox. *(Does not work in Gmail.)*

- ***Message**

  Required. Enter or edit the text that will appear in the body of the message if needed. To format text in the ***Message** field, see Customizing emails, messages & web pages.

NOTE: Customize form letters

If you are sending an email based on a pre-set MR9 message or an MR9 template (such as invoices and worksheets), any edits you make here affect this letter only.

- **To update the canned email,** see Customizing communications.
- **To update the letter template or create new ones,** see Creating/updating forms & letters.

2. Set options

If you want to:

- **Send a copy of the email to other(s),** click **Cc.** Then enter email address(es) in the **Cc** field separated by commas.
- **Send a blind copy of the email to other(s),** click **Bcc.** Then enter email address(es) in the **Bcc** field separated by commas.
- **Include repository files,** click **Insert files from Repository.** Then check the box(es) of file(s) you want to include from the list of repository files that appears. This feature is available in:
  - Orders > Parties
  - Send Invoices
  - Invoice Inquiry
- **Include attachment(s) from your computer,** click **Attach files.** Then either:
  - **Drag and drop file(s)** from your desktop into the **Attachment(s)** dotted-outline box.
  - **Click the dotted-outline box,** then locate and select file(s) from your computer.

  Your selection(s) will appear in a list above the dotted-border field.

  TIP: View email attachments before sending

  You can download and view any files listed in the **Attachment(s)** field by clicking the hyperlinked file name.
- **Delete attachment(s),** click ⊖ in the file's listing.

3. Send email

1. Click **Send.**
2. If you are sending a batch of emails at once, when you click **Send** in the mail composer, the first email is sent and the second one appears. Repeat updating and sending until all emails are sent.
3. If an "operation successful" popup appears, click **OK.** If sending emails from a results grid, MR9 will post a status message, "Email sent successfully," in the Result column.

NOTE: MR9 is not an email program

MR9 does not keep copies of all emails sent from within the system. To see which emails are logged in the system, see Viewing email logs.

If you want to keep copies of all of your emails sent from MR9, enter your email address in the **Bcc Emails** field in your personal User Preferences window's **Email** pane. See Customizing email preferences.

Reference

- General preferences
- Form Templates
- Send Invoices
- Invoice Inquiry
- User Preferences

Step-by-step instructions

- Emailing from MR9
- Entering general contact information
- Entering general location information
- Alerting clients
- Adding parties to orders
- Finding overdue invoices
- Sending collection letters
- Managing tags
- Managing notification emails
- Customizing emails, messages & web pages
- Customizing communications
- Creating/updating forms & letters
- Adding parties to orders
- Viewing email logs
- Customizing email preferences

Making entries in notes logs

Enter notes in Notes Logs to keep a paper trail in MR9. You can make entries in the Notes Log of any:

- **Order**
- **Part**
- **Firm**
- **Contact**
- **Location**
- **Invoice**

MR9 also makes notes for you. Notes you, other staff, and MR9 enter appear chronologically in the Notes Log of the MR9 entry you edited. Notes can be canceled but not edited nor deleted. (See Canceling notes.)

You can set remind dates and times in notes to have MR9 follow up with you automatically.

You can set up categories of notes, so that you can filter the entries in a Notes Log to see only specific types of notes. (See Managing notes logs.)

Notes entered in any Notes Log are for internal company use only and are not published on MR Connect or in any correspondence with clients unless you select that option.

1. Create new note

1. Either:
   - In a results grid, check the box for one or more entries and click **Actions > Add Notes Log.**
   - In an Edit window, click in the **Notes Log** pane.
2. In the New Notes Log, the date and time are automatically entered in **Communication Date** *(uneditable).* **Communications Type** defaults to the choice selected in Lists > Others. **Notes Type** defaults to the one set in Lists for the category of notes you are currently in (for example, adding a note to a *part's* Notes Log displays the default in Lists > Parts > Notes Type).

2. Enter required information

***Notes** is the only required field. Enter information here that you want to keep a paper trail for.

1. ## Enter supporting information

   If desired, enter/update the following information:

   - ### Communications Type

     Change the note's contact method in the dropdown.

   - ### Notes Type

     Select the category of the note in the dropdown.

   - ### Set Remind

     Slide to Yes to have a reminder sent to someone through MR9. When checked, the following fields appear:

     - ***Remind Date** – *Required.* Enter the date and time (or use the Date Navigator and time dropdown) for sending a follow-up. (See Entering dates & times.)
     - ***Remind To –** *Required.* Select someone in the dropdown to receive a reminder message on that day from MR9. See Communicating within MR9.

     #### NOTE: Names included in reminder Subject lines

     Reminders sent from orders, parts, firms, contacts, and locations automatically include the related name for easy identification.

   - ### Show to Client

     Default is No. Slide to Yes if you want the client to see the note.

2. ## Save note

   Click **Save.** The **New Notes Log** panel closes, and the new log entry appears in the Notes Log.

TIP: Save client correspondence in Notes Logs

Instead of having to look in 2 places for what clients communicated with you, enter email correspondence and notes about phone conversations in the appropriate Notes Log in MR9.

Reference

- Order
- Firm
- Contact
- Location
- Invoice
- Tracking path

- MR Connect
- Others lists
- Parts lists
- Date Navigator

Step-by-step instructions

- Canceling notes
- Managing notes logs
- Entering dates & times
- Communicating within MR9

Managing notes logs

As you use MR9 Notes Logs, you might find some logs get quite lengthy. As the default, MR9 shows every notes log entry, except canceled notes, for the specific order, part, firm, contact, location, or invoice. You can filter your notes log entries to see only specific types of notes within a log. You can also view canceled notes.

Filter notes

To limit which notes you view in the **Notes Log** pane of any View/Edit window:

1. Click .
2. In the **Filters** panel depending on the notes in the log, panes for different filters appear:
   - **Entered By** – All MR9 users who left notes in this log are listed.
   - **Notes Type** – The categories of notes in this log.
   - **Communications Type** – The ways notes in this log were received, e.g., System, Email or Call.
3. All boxes are checked by default. To shorten this notes log, uncheck the box in the header(s) of the pane(s) displayed, then check the box for each filter of notes you want to view. (Notes Types and Communication Types are defined in Lists.)
4. Click **OK.** MR9 filters the Notes Log to show only notes that match the Notes Type(s) selected.

View canceled notes

1. To see a notes log's canceled notes, click in its **Notes Log** header.
2. In the **Filters** panel, slide **Show Canceled Notes** to Yes.
3. Click **OK.** Canceled notes are displayed with a line through the note and include the date and time the note was canceled and who canceled it in red text.

Reference

- Contacts lists
- Firms lists
- Invoice lists
- Locations lists

- Orders lists
- Parts lists

Step-by-step instructions

- Making entries in notes logs
- Canceling notes
- Entering dates & times
- Communicating within MR9

Canceling notes

Once saved, log entries cannot be tampered with. They can be canceled — but they remain in the log with Canceled information.

1. ## Select the note

   In the Notes Log pane of any Edit window, click the hyperlinked date stamp of the note you want to cancel.

2. ## Cancel the note

   In the **View Notes Log** panel, click **Cancel Note.** Then click **Yes** in the popup window that appears.

TIP: Viewing canceled notes

To see a Notes Log's canceled notes, click the **Notes Log** pane's **> Show Cancelled Notes.** Canceled notes are displayed with a line through the note and include the date and time the note was canceled and who canceled it.

Step-by-step instructions

- Making entries in notes logs
- Managing notes logs

Printing invoices, statements, & reports

The invoices, statements, and reports that MR9 generates cannot be edited in MR9 (unlike MR9 letters generated from form templates). You can export them to various formats or print them.

When MR9 generates an invoice, statement, or report, it displays in a WYSIWYG format with tools in the window header.

To:

- **Go to the beginning**
- Click .

- **Go back one page**

  Click .

- **Jump to a specific page**

  Type over the number in the page field,

, with the number of the page you want. Then press Enter or Return.

- **Page forward**

  Click .

- **Go to the end**

  Click .

- **Save file**

  Click and select an export file type in the dropdown:

  - **Acrobat (PDF) file**

    File format that preserves a file's text formatting and images

  - **CSV (comma delimited)**

    [Comma-Separated Values] text file format that uses commas to separate field entries

- **Excel 97-2003**

  Binary file format [BIFF8] to use in *Excel*.

- **Rich Text Format**

  [RTF] document file format that retains some of a file's text formatting

- **TIFF file**

  [Tagged Image File Format] file format for storing images

- **Web Archive**

  [MHTML (short for MIME HTML, which is short for Multi-Purpose-Internet-Mail-Extensions Hypertext-Markup-Language)] cross-platform file format for web pages that saves linked files too, such images.

- **Print**

  Click . See Printing PDFs from MR9.

- **Zoom in**

  Click .

- **Zoom out**

  Click .

- **Toggle between full-page and & width**

  Click .

- **Search contents**

  Click . In the popup window that appears, enter text to search for in **Find,** then press the Enter or Return key. Any instances of the text that are found will appear listed under **Result # of #** and highlighted in the report. Jump to a particular instance in the report by clicking it in the list. If you search for different text in the same report, you can click ▾ next to the **Find** field and select a previous search string to search again.

You cannot edit these documents. If an invoice, statement, or report is incorrect, you must generate it again.

TIP: Search criteria appear on MR9 reports

Some search criteria you use to generate a report in MR9 appear at the bottom of each page of the report above the timestamp so you can know at a glance how the report was

created. For example if you have entered dates in search criteria, the date type and date range will appear.

Search criteria that are not displayed:

- Blank search fields
- ALL selection in a dropdown
- Grouping and sorting
- Selected contact in a report generated for that contact
- Selected BU, if the report is for giving to a contact

If you select two or more items in a dropdown, the report will display that as "(multiple values selected)." Search criteria information appears on reports only, not invoices and statements.

NOTE: MR9 form letters are editable; invoices, statements & reports are not

Form letters in MR9 can be customized in Form Templates. You can also edit individual letters on the fly before sending. MR9 reports, including invoices and statements, are not editable.

Reference

- Microsoft Excel
- Form Templates

Step-by-step instructions

- Printing letters
- Printing PDFs from MR9

Microsoft Excel

Excel is the industry-standard spreadsheet software developed by Microsoft.

Step-by-step instructions

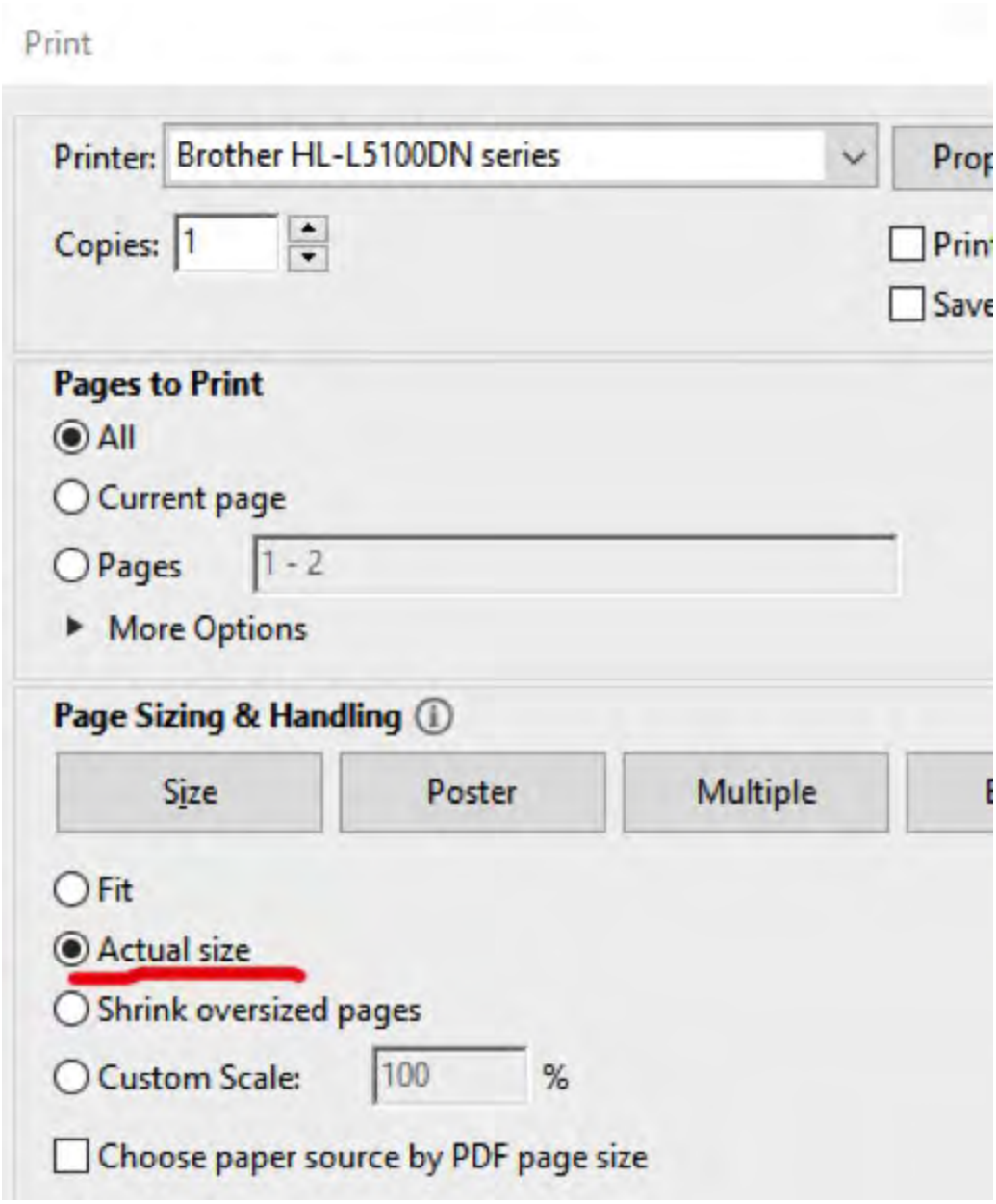
- Printing invoices, statements, & reports
- Exporting & printing results
- Finding overdue invoices
- Importing entity data from other systems

Printing PDFs from MR9

When printing PDF documents such as invoices, statements, and checks, select the following settings to have the documents print correctly:

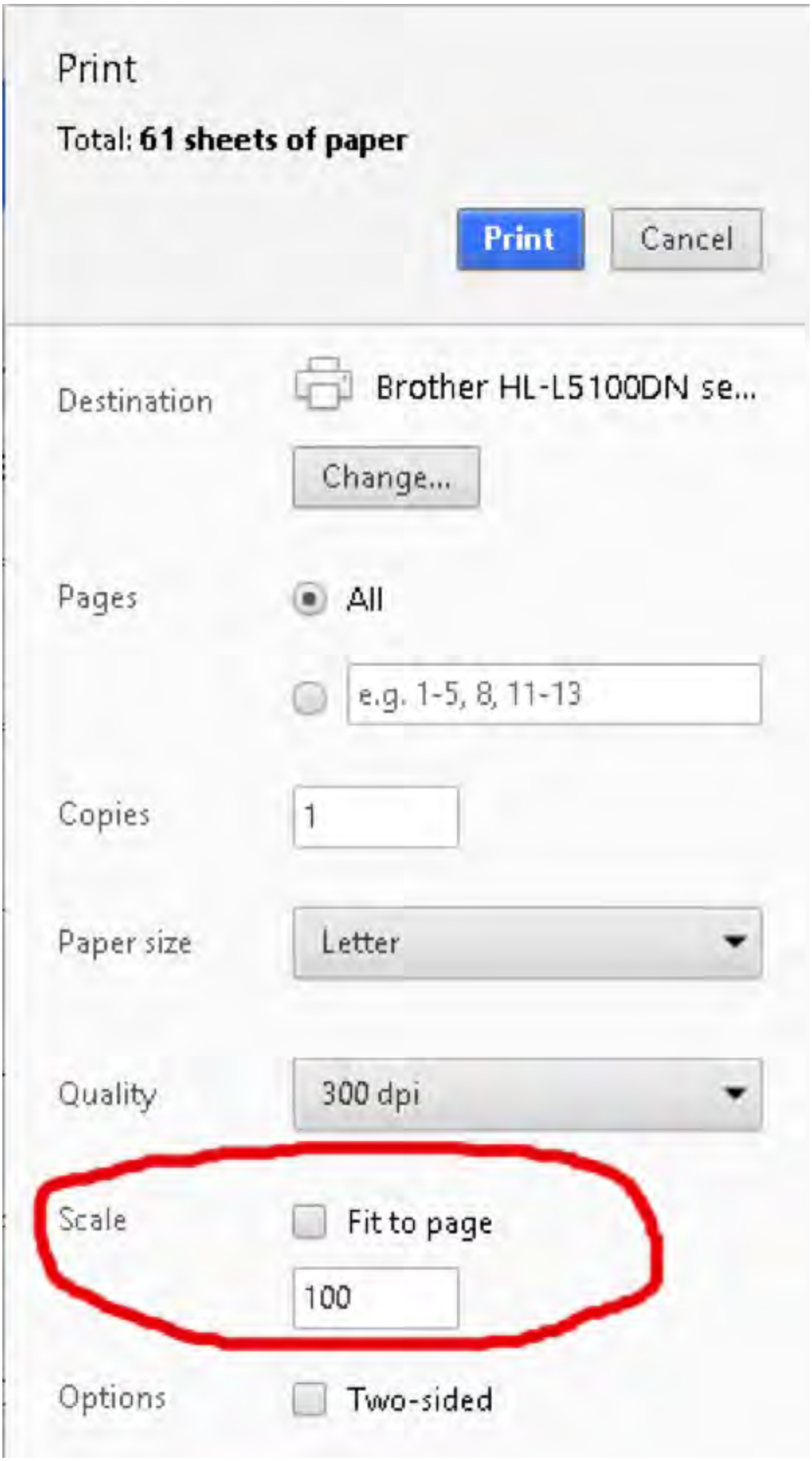
- **Downloaded PDF**

  In *Adobe Acrobat's* **Print** popup, select Actual size in **Page Sizing & Handling.**



- **Directly from browser**

  In the brower's Print window, set **Scale** to 100. (Terminology might differ based on the browser.)


Print
Total: 61 sheets of paper
Print
Cancel
Destination
Brother HL-L5100DN se...
Change...
Pages
All
e.g. 1-5, 8, 11-13
Copies
1
Paper size
Letter
Quality
300 dpi
Scale
Fit to page
100
Options
Two-sided

Reference

- PDF

Step-by-step instructions

- Printing custodian fee checks

Picking colors in MR9

Use the MR9's color picker to customize colors to match your needs.

Continued from Order Status Color preferences, Statement preferences, or Branding preferences.

1. To change the color from the default, click the color field's .
2. In the popup color picker, choose:
   - **Simple**

     Default. Click a color swatch to select it.
   - **Advanced**

     In the Advanced color picker, either:
     - Edit the 6-digit hexidecimal code.
     - Click the basic hue you want on the rainbow scale at the side, then click the color you want in the large lightness and saturation square.

Reference

- Order Status Color preferences
- Statement preferences
- MR Connect

Step-by-step instructions

- Branding preferences

Uploading logos for insertion

You can brand various documents and web pages with your company logo. After preparing your logo for the specific application, add it in the appropriate function.

1. In the dotted-border logo field, either:
   - **Drag and drop** your logo image file into the field.
   - **Click the field,** then locate and select your logo image file from your computer.
2. Your selected image will replace the dotted-border field. If it does not fit within the space or if anything else is wrong, remove the file by clicking ⊖ in the upper right corner of the image. Reformat your logo and try adding it again.
3. Click **Save.**

Reference

- MR Connect

Step-by-step instructions

- Adding your company logo to invoices
- MR Connect branding preferences

Customizing notes & messages

Customize the appearance of the contents of different Notes and Invoice Message fields.

Continued from Selecting invoice messages or Entering electronic billing information.

In most Notes fields (such as Direct Billing Notes), when:

- **Entering text**

  Set these options then enter text.

- **Changing existing text**

  Select text to be customized then select options.

  - **Text options**

    - **Bold**

      Toggle the selected text's weight between the default and bold.

    - **Italic**

      Toggle the selected text's style between the default and italic/oblique.

    - **Underline**

      Underline selected text, including word spaces, with a single line.

    - (inherited f...) **Select Font Family**

      Scroll up or down the list of fonts and typefaces to select a different font for the selected text.

    - (inherited s...) **Select Font Size**

      Scroll up or down the list of default font sizes to select a different size for the selected text.

    - **Color**

      Select a color in the default palette as the color for the selected text.

    - **Background Color**

      Select background color in the dropdown for the text area of selected text.

TIP: Insert cursor to change word's appearance

Instead of highlighting a word you can simply click to insert the cursor inside the word, then apply the customization to the whole word at once. For example click within a word, then click B and the entire word will be bolded.

TIP: Resize panes to see more/less

Any of these panes that allow you to style text can be stretched vertically while you are working in them so you can see more of your content at once instead of having to scroll to see parts that are hidden from view. You can also shrink them if desired to have more of the other panes in the same window visible or placed higher on your screen. Click and hold in the lower right corner of the pane you want to change, then drag up or down to change the size of the pane. MR9 does not save your adjustments after closing the window.

Step-by-step instructions

- Selecting invoice messages
- Entering electronic billing information

Starting orders from scratch

If you are entering a new case into MR9 — or any order that is not similar to an existing order — you must start from scratch. You can set up an order with only the scheduling client — MR9 automatically enters the other required information.

While you must enter required order information *(designated by * in MR)* before saving a new order, you can enter other information at any time.

1. Start a new order

1. **Orders > Orders**
2. In the Orders window, click **New.**

2. Enter required order info

1. The **Lookup Firm** panel opens automatically. Select the firm requesting records/services. See Looking up firms.
2. In New Order window's **General** pane, ***Order Date** defaults to today and **Status** defaults to Active. Change the date if necessary. See Date Navigator. **Status** cannot be changed until you save the order.
3. **Scheduling Firm Warning** come from the selected firm's entry in Firms. The scheduling firm also appears in **Ordered By Firm.**

   Select ***Scheduling Contact** *(required)* from the default dropdown of the scheduling firm's contacts, or click + **> New Contact** to add a new contact to the scheduling firm (see Adding contacts to MR9).

   Scheduling Contact Warning comes from the scheduling contact's entry in Contacts. Scheduling contact also appears in **Ordered By Contact.**

   NOTE: C.O.D. clients

   COD next to a Firm or Contact label indicates a COD (Cash on Delivery) client.
4. ***Business Unit** default comes from your User Preferences (see Setting personal preferences). Select a different BU in the dropdown if desired.

3. Enter basic info (optional)

You can enter basic information now, later at your convenience, or when you receive more information.

- **General**

  To enter basic information, such as the client and processor, see Entering general

order information.

- **Case**

  To enter information about the order's related case, see Entering case information.

- **Records Of**

  To enter the related patient/subpoenaed witness information, see Entering patient & other records information.

- **Additional**

  To enter miscellaneous information, such as the related trial date or the Sales Rep assigned to the order, see Entering additional order information.

- **Forms**

  To arrange the full case style and court style as they will appear on documents related to this order, see Entering case & court styles.

4. ## Save order

   Click **Save >**

   - **Save & Edit** – To continue entering order information. The order is assigned an order number, additional order detail panes and functions appear, and the **Parties** pane automatically scrolls to the top. To add parties to the order, see Adding parties.
   - **Save & New** – To start a new order. The order is assigned an order number, and is replaced in the New Order window with a new blank order that includes the same scheduling and ordered by client(s).

5. ## Do more

   1. After saving the new order, you can enter more information and access other functions from within the Edit Order window. To:

      - **Continue entering information** – See Updating orders.
      - **Create work orders (parts)** – See Adding parts to orders.
      - **Print forms** – See Sending forms.
      - **Request fee checks** – After creating work orders (see Adding parts to orders), enter check requests by clicking in a part's **Fee Checks** pane. See Entering & updating check request details.
      - **Call custodians** – After creating work orders (see Adding parts to orders), look up a location's phone number in a part, then record the call in the part including follow-up reminders. See Making entries in notes logs.

- **Receive records** – After creating work orders (see Adding parts to orders), enter information about related records as you receive them. See Receiving records.

2. After updating information in an order, click **Save >**
   - **Save & Edit** to save your changes and continue working on the order.
   - **Save & Close** when you are finished updating.

Reference

- Order
- Scheduling Client
- Firms
- Contacts
- Date Navigator
- Business Units

Step-by-step instructions

- Starting orders from existing orders
- Looking up firms
- Adding contacts to MR9
- Setting personal preferences
- Entering general order information
- Entering additional order information
- Entering case & court styles
- Adding parties
- Updating orders
- Adding parts to orders
- Entering & updating check request details
- Making entries in notes logs
- Receiving records.

Starting orders from existing orders

If you are entering a new patient/subpoenaed witness on a continuing case (e.g., a class action lawsuit), instead of starting from scratch, save time and reduce errors by copying an existing case and entering only the new information. You can copy the order and its parts or copy the order alone.

1. Find an existing order

1. **Orders > Orders**
2. In the Orders window, search for the order you want to copy. See Searching orders.

2. Copy the order

1. In the results grid in the Orders window, click the order's **>**
   - **Copy Order without Parts** – To copy only the order.
   - **Copy Order with Parts**– To copy any parts along with the order. The **Select Parts** panel opens with any active parts selected. If you want to change which parts to copy, check the boxes of parts you want to copy. Then click **Save.**
2. MR9 creates a new order that includes information from the existing order's **General, Case, Additional, Forms, Parties,** and **Notes Log** (system notes only) panes only and jumps to the blank **Records Of** pane. To enter the patient/subpoenaed witness information, see Entering patient & other records information.
3. To enter/update other information, see Updating orders.

TIP: Copy orders from their detail screen

If you want to check that you selected the correct order before copying it, click its hyperlinked **Order No.** or its **> View/Edit** in the Orders results grid. After confirming you selected the right order, click **Edit** if in the View Order window, then in the Edit Order window, click **More > Copy Order without Parts/Copy Order with Parts.**

3. Save the new order

Click **Save >**

- **Save & Edit** – To save the new order and continue updating it.
- **Save & Close** – To save the new order and close its Edit Order window.

Reference

- Order
- Part

Step-by-step instructions

- Searching orders
- Entering patient & other records information
- Updating orders

Importing orders from online requests

If you offer clients the ability to schedule orders online through MR Connect, MR9 will automatically assign them order numbers and you can import the information and files submitted with the order request.

1. Import request

1. Either:

   - **Use the Import Online Orders function**

     1. **Connect > Import Online Orders**
     2. In the Import Online Orders window, **Status** defaults to Not Imported and all new records requests sent by clients through MR Connect are listed. To narrow the results shown, see Searching online orders.
     3. Click a hyperlinked **Order No.** to go to its Import Online Order window.

   - **Use Notifications and Messages function**

     1. If you receive a message in the notification area of your browser, click the alert box to open Notifications and Messages. Or click **[your name on the screen]** **> Notifications and Messages.**
     2. In the Notifications and Messages window, click the hyperlinked new order request.
     3. In the View Message window, click the hyperlinked **Order No.**

2. In the Import Online Order window, the order information submitted by the client through MR Connect appears and the order's **Status** is Request New. All of the fields are uneditable. Click **Import.**
3. The order is imported into MR9, the order's **Status** changes to New, several new panes are added to the window, and the window scrolls to the **Repository** pane.

2. Import files

If there are any files listed in the **Repository** pane, import them into the order's repository in MR9 by checking their boxes and clicking .

3. Import locations

1. Scroll or jump to the **Parts** pane.

2. Click the hyperlinked part in the **Parts** pane.
3. In the **Import Part** panel, if ***Location** is blank, click its .
4. Look up the location the client entered in **Location Name** in the **Import Part** panel. See Looking up locations. (If it's not in your Location database, click **New** to add it. See Adding locations to MR9.)
5. Select a category of what the request is for in ***Tracking Item** in the **Import Part** panel, such as Records or Process Serving. (Tracking Items are set in Lists > Tracking.)
6. Click **Import.**

4. If you want to add/update information in the order, click . See Updating orders.

Reference

- MR Connect
- Lists > Tracking

Step-by-step instructions

- Searching online orders
- Looking up locations
- Adding locations to MR9
- Updating orders

Entering general order information

After entering the required order information (see Starting orders from scratch), you can enter or update the order's information at any time.

Continued from Starting orders from scratch or Updating orders.

1. In the New Order/Edit Order window, enter text or make selections in the **General** pane:

   - **Order No.**

     This number is automatically assigned to the order by MR9 when the order is first saved in the system and is not editable.

   - ***Order Date**

     Required. Default is date order was entered into MR9. To change the date, see Date Navigator.

   - **Rush**

     Default is No. Slide to Yes if this is a rush request.

   - **Status**

     Default status appears. In a New Order window, **Status** can't be changed. Otherwise, to change the order status, click ▽ **> Change Status.** See Changing order or part status.

   - ***Scheduling Firm**

     Required. Firm requesting records/services was selected when creating the order. Click ▽ >

     - **Lookup Firm** – To change the scheduling firm. See Looking up firms.
     - **View Firm** – To view/edit the firm's details. See Updating firms.

   - ***Scheduling Contact**

     Required. Contact requesting records/services was selected when creating the order. You can select a different contact at the firm from the default dropdown, or add a new contact by clicking + / ▽ **> New Contact.** See Adding contacts to MR9.

   - **Scheduling Firm Warning**

     Comes from the selected firm's entry in Firms *(uneditable*).

   - **Scheduling Contact Warning**

     Comes from the scheduling contact's entry in Contacts *(uneditable*).

Ordered By Firm

Firm responsible for the order. Default **Ordered By Firm** is the the firm selected as the scheduling firm when creating the order. Click **>**

- **Lookup Firm** – To change the firm responsible for the order. See Looking up firms.
- **View Firm** – To view/edit the firm's details. See Updating firms.
- **Remove Ordered By Firm** – To leave this field blank.

- ### Ordered By Contact

  If **Ordered By Firm** is same as **Scheduling Firm,** the default **Ordered By Contact** is the the contact selected as the scheduling contact when creating the order. You can select a different contact at the firm from the default dropdown, or add a new contact by clicking / **> New Contact.** See Adding contacts to MR9.

  #### NOTE: C.O.D. clients

  COD next to a Firm or Contact label indicates a COD (Cash on Delivery) client.

- ### Notation

  (24-character limit) Special notations, "SR" (for super rush) or "NC" (for new client) that appear in the Orders main grid so you don't have to open orders to see this information and you can sort orders by this field.

- ### *Business Unit

  Profit center or part of your business you track separately. The default BU comes from your User Preferences. See Setting personal preferences. To select a different BU that should receive credit for this order, click and select one in the dropdown.

- ### Processor

  Case coordinator who will process this order. To select a processor, click . See Looking up users.

- ### Client Rep

  Representative who will oversee this order on behalf of the client. The default comes from the scheduling contact. To select a different client rep, click . See Looking up users.

- ### Warning

  Unlimited character count. Enter any alerts that one must be aware of regarding this order. Text entered here appears in the Orders main grid as well as in the order and its parts' detail windows.

2. Click **Save >**

- **Save & Edit** – To continue working on the same order.
- **Save & New** – *(New Order window only).* To start a new order. The current order is assigned an order number, and is replaced in the New Order window with a new blank order that includes the same scheduling and ordered by client(s).
- **Save & Close** – *(Edit Order window only).* To save your work and close the window.

3. If continuing to add/update information, see Updating orders.

Reference

- Lists
- Date Navigator
- Business Units
- Processor
- Client Rep
- Lookup panel

Step-by-step instructions

- Starting orders from scratch
- Updating orders
- Changing order or part status
- Looking up firms
- Updating firms
- Adding contacts to MR9
- Updating contacts
- Setting personal preferences
- Looking up users

Entering case information

After entering required order information, you can enter the related case information at any time.

Continued from Starting orders from scratch or Updating orders.

1. In the New Order/Edit Order window, scroll or jump to the **Case** pane and enter text or make selections:

   - **Case Name**

     Brief case name (case nickname or caption). This short case name prints on all documents including invoices, some reports, and any forms that include the "Case Name" data field. (see Editing form Data Fields options.)

   - **Case No.**

     The court-assigned cause number for this case

   - **Federal Case**

     Default is No. Slide to Yes if this case will be heard in a federal district court.

   - **State**

     Click ▾ and select the state (where the case is filed) in the dropdown.

   - **County**

     If this is a state case, enter the county, such as "Harris."

   - **Court**

     If this is a state case, enter the judicial court information, such as "151st" or "County Court at Law Number Two."

   - **District**

     Federal or state level district, such as "Southern."

   - **Division**

     If this is a federal case, enter the division, such as "Houston."

   - **Full Case Name**

     Enter the case name yourself or click **> Assemble Full Case Name** to have MR9 automatically assemble the full case style using information you entered in the seven lines in the **Style** side of the **Forms** panel. See Entering case & court styles. Edit text if needed.

- **Court Firm**

  On certain documents, such as state subpoenas, the name of the court (including full address) might be required. Click to select the court. See Looking up firms.

- **Clerk**

  Court clerk responsible for case. Select the court in **Court Firm** first, then select the= court's clerk in the dropdown. If the clerk is not listed, click to add them to the= court. See Adding contacts to MR9.

- **Case Type**

  Category case — e.g., Product Liability — falls under. (Case Types and default are=set in Lists > Orders.)

2. Click **Save >**

   - **Save & Edit** – To continue working on the same order.
   - **Save & New** – *(New Order window only).* To start a new order. The current order is assigned an order number, and is replaced in the New Order window with a new blank order that includes the same scheduling and ordered by client(s).
   - **Save & Close** – *(Edit Order window only).* To save your work and close the window.

3. If continuing to add/update information, see Updating orders.

Reference

- Lists > Orders
- Lookup panel

Step-by-step instructions

- Starting orders from scratch
- Updating orders
- Editing form Data Fields options
- Entering case & court styles
- Looking up firms
- Adding contacts to MR9

Entering patient & other records information

After entering the required order information (see Starting orders from scratch), you can enter information about the records you are to retrieve at any time, such as who the records reference and their relevant personal details.

Continued from Starting orders from scratch, Starting orders from existing orders, or Updating orders.

1. In the New Order/Edit Order window, scroll or jump to the **Records Of** pane and enter text or make selections:

   - **Records Of**
     Patient name — or witness if this is a subpoena — including "aka" (also known as), if applicable.
   - **Address**
     Person's street address only. Do not include city, state or zip code here.
   - **City**
     Person's city. Enter the postal code in **Zip** and click to automatically populate this field.
   - **State**
     Person's state. Enter the postal code in **Zip** and click to automatically populate this field.
   - **Zip**
     Enter person's postal code in **Zip** and click . **City, State,** and **Country** fields will automatically populate.
   - **Country**
     Person's country. Enter the postal code in **Zip** and click to automatically populate this field.
   - **Authorized By**
     Specify whether the authorization is by subpoena, patient, or other. The default is Subpoena.
   - **Records Of Type**
     Category of patient/witness, such as Plaintiff. (Records Of types and default are set in Lists.)

- **SSN**

  Person's Social Security number

- **Driver License No.**

  Person's driver's license number

- **Date of Birth**

  Person's date of birth. Enter the date in the field or click to select date in the Date Navigator.

- **Date of Death**

  If person is deceased, the date of their death. Enter the date in the field or click to select date in the Date Navigator.

- **Date of Incidence**

  Date the relevant event happened, if applicable. Enter the date in the field or click to select date in the Date Navigator.

2. Click **Save >**

   - **Save & Edit** – To continue working on the same order.
   - **Save & New** – *(New Order window only).* To start a new order. The current order is assigned an order number, and is replaced in the New Order window with a new blank order that includes the same scheduling and ordered by client(s).
   - **Save & Close** – *(Edit Order window only).* To save your work and close the window.

3. If continuing to add/update information, see Updating orders.

Reference

- Lists
- Date Navigator
- Sales Rep
- Lookup panel.
- Turn In

Step-by-step instructions

- Starting orders from scratch
- Starting orders from existing orders
- Updating orders

Entering additional order information

Update defaults and enter additional order information in the New Order/Edit Order window.

Continued from Starting orders from scratch or Updating orders.

1. In a New Order/Edit Order window, scroll or jump to the **Additional** pane, and enter or update text or make selections:

   - **Due Date**

     Since each part carries its own due date which MR9 generates when creating the part, entering a due date here at the order level might not be that useful or necessary. See Entering general part information.

   - **Trial Date**

     Scheduled date for trial to begin. To enter a date, see Date Navigator.

   - **Start Date**

     Date you plan to start working on this order. To enter a date, see Date Navigator.

   - **Waiver Date**

     Date the waiver period will end. To enter a date, see Date Navigator.

   - **Received By**

     Method by which this order was received. Select method in dropdown. (Options and default are set in Lists > Orders > Received By.)

   - **Sales Rep**

     The account executive/sales representative who should get a commission for this order. The default comes from the scheduling contact. See Entering general order information.

   - **Remarks**

     Unlimited character count. Remarks for internal use only. Text entered here does not appear on any outgoing communications.

2. Click **Save >**

   - **Save & Edit** – To continue working on the same order.

   - **Save & New** – *(New Order window only).* To start a new order. The current order is assigned an order number, and is replaced in the New Order window with a new blank order that includes the same scheduling and ordered by client(s).

- **Save & Close** – *(Edit Order window only).* To save your work and close the window.

3. If continuing to add/update information, see Updating orders.

Reference

- Part
- Date Navigator
- Lists > Orders
- Sales Rep

Step-by-step instructions

- Starting orders from scratch
- Updating orders
- Entering general part information
- Entering general order information

Entering case & court styles

Format how the case and court styles appear on documents for this order whether it is a federal, state, or local case.

Continued from Starting orders from scratch or Updating orders.

1. In a New Order/Edit Order window, scroll or jump to the **Forms** pane, and enter or update text or make selections:

   - **Style**

     Enter the full case style formatted exactly the way you want it to be printed on documents in lines 1 through 7. For example, enter the plaintiff in line 1, the defendant in line 7 and "vs." in line 4.

     Click **> Assemble Full Case Name** in the **Case** pane above so that the full case style will be centered on documents. See Entering case information.

   - **Court**

     Enter text manually or click **Assemble Court** to have MR9 automatically assemble the court style using the information you entered in System Preferences > Orders > Assemble Court.

2. Click **Save >**

   - **Save & Edit** – To continue working on the same order.
   - **Save & New** – *(New Order window only).* To start a new order. The current order is assigned an order number, and is replaced in the New Order window with a new blank order that includes the same scheduling and ordered by client(s).
   - **Save & Close** – *(Edit Order window only).* To save your work and close the window.

3. If continuing to add/update information, see Updating orders.

Reference

- Orders preferences

Step-by-step instructions

- Starting orders from scratch
- Updating orders
- Entering case information

Scheduling Client

A **scheduling client** is the firm and the contact at that firm who initiates an order with your company by requesting records retrieval, process serving, or other services. Both the scheduling firm and contact can be different from the ordering firm and contact on an order.

Reference

- Orders
- Ordering Client

Ordering Client

An **ordering client** is the firm and the contact at that firm who is responsible for an order with your company. Ordering firms and contacts can be different from scheduling firms and contacts.

Reference

- Order
- Scheduling Client

Parties

Parties are people or other entities involved in a legal transaction, such as a case or deposition.

Step-by-step instructions

- Adding parties
- Updating parties

Adding parties to orders

You can add parties to orders and update their information, such as who to bill and what services the party has requested for specific orders, at any time. You can also set their billing rate for specific orders and send them emails.

Continued from Starting orders from scratch, Starting orders from existing orders, or Updating orders.

1. Add a party

In the Edit Order window, scroll or jump to the **Parties** pane. The scheduling client is automatically entered in the **Parties** pane when you save the order. And any parties added to the order previously are listed. (To update existing parties' information, see Updating parties.)

1. Click ➕ in the **Parties** pane header.
2. In the **Lookup Firm** panel, search for firm and click its hyperlink. See Looking up firms. (If the firm is not in your database, click **New** to add the firm. See Adding firms to MR9.)
3. In the **New Party** panel's **General** pane, the first person in the selected firm's Contacts list appears in the ***Contact** *(required)* field. If you want to add a different contact from the firm, click ▾ and select the contact in the dropdown. (If a contact at the firm is not listed, click ▽... **> New Contact** to add the contact. See Adding contacts to MR9.)

2. Enter party information

You can add more information about the party now or later. To add information later, click the party's hyperlinked name in the **Parties** pane of the Edit Order window.

- ### General

  To enter general information about the party, such as what their role is and what privileges they get, see Entering general party information.

- ### Billing Info

  To enter the party's billing information, such who to bill and insurance information, see Entering party billing information.

3. Finish adding party

1. Click **Save >**

- **Save & Edit –** To continue adding information about the party in the **Edit Party** panel.
- **Save & Close –** If you don't have more information to include about the party or additional parties to add.
- **Save & New –** To add another party without leaving the **New Party** panel. Automatically opens **Lookup Firm** panel to search for another order party.

2. MR9 adds the party to the **Parties** pane and adds **Requested Services, Waiver Response,** and **Notes Log** panes to the **Edit Party** panel. If you want to add information to a party's:

   - ### Requested Services

     To include the party's standing requests for services on records received in this order, see Entering preferred or requested services.

   - ### Waiver Response

     As order parts (records requests) are entered in MR9, they automatically appear here. To record the party's waiver responses/copy orders, see Recording waiver responses.

   - ### Notes Log

     To add notes to the party's Notes Log, see Making entries in notes logs.

4. ## Do more

After saving new parties & closing the **New Party/Edit Party** panel, you can assign a billing rate table to one or more of them at the same time and send group emails or single emails from within the order.

- ### Apply one set of rates to multiple parties

  Specifying a billing rate table for every single party on a case can be a time-consuming and tedious chore when you have many parties. Instead designate which billing rate table applies to services ordered by one or more parties at the same time.

  1. In the Edit Order window, check the party's box in the **Parties** pane.
  2. Click **> Set Billing Rate.** To select a billing rate table, see Looking up billing rate tables.

- ### Send parties group or single emails

  Instead of going into a party's contact listing to email them, you can send emails to one or more of the parties listed here.

1. In the View Order/Edit Order window, check the box of each party you want to email in the **Parties** pane.
2. Click **> Send Email.**
3. The **Email** panel opens with your default email address and all the selected parties' email addresses listed in the **To** field (if their addresses are saved in their Contact listings — see Entering general contact information). To send an email, see Composing emails.

5. **Save order**
   When done entering order information, click **Save > Save & Close** in the Edit Order window.

Reference

- Parties
- Prefill
- Lookup panel

Step-by-step instructions

- Starting orders from scratch
- Starting orders from existing orders
- Updating orders
- Updating parties
- Looking up firms
- Adding firms to MR9
- Adding contacts to MR9
- Entering general party information
- Entering party billing information
- Entering preferred or requested services
- Recording waiver responses
- Making entries in notes logs
- Looking up billing rate tables
- Entering general contact information
- Composing emails

Entering general party information

You can enter general information about a party, such as what their role is and what privileges they get, when adding parties or anytime afterwards.

Continued from Adding parties or Updating parties.

1. In the **General** pane of the **New Party/Edit Party** panel of an Edit Order window, enter or update the following:

   - ***Firm**
     Required. Selected contact's firm is displayed. To change firm, click ▽... **> Lookup firm.** See Looking up firms.

   - ***Contact**
     Required. Default firm contact is displayed. To change contact, click ▾ and select one in the dropdown. (If the contact does not exist in your MR9 database, click ▽... **> New Contact.** See Adding contacts to MR9.)

   - **Firm Warning/Contact Warning**
     Uneditable.

   - **Represent For**
     Which side this party represents (e.g., Plaintiff or Defendant). (Options and default are set in Lists > Orders.)

   - **Represents**
     Name of the person or group this party represents

   - **Scheduling Attorney**
     Uneditable.

   - **Ordering Attorney**
     Default is No. Slide to Yes if client will be signing the Notice.

   - **Opposing Side Attorney**
     Default is No. Slide to Yes if this attorney represents the side opposite from the scheduling attorney.

   - **Patient's Attorney**
     Default is No. Slide to Yes if this attorney represents the patient of record.

   - **Inactive From**
     Date the entity stopped being a party to the order.

   - **Connect Access Only**
     Default is No. Slide to Yes if you are adding a party who is not an attorney of record

(e.g., adjuster).

- **Allow Orders function access in Connect**
  Default is No. Slide to Yes to allow this party to order records for this order online.
- **Allow Order-level repository access in Connect**
  Default is Yes. If Yes is selected, this party will be able to access order-related documents (such as pre-discovery documents and waiver responses) stored in the repository. Slide to No to deny this client access.
- **Allow Part-level repository access in Connect**
  Default is No. If Yes is selected, this party will be able to access part-related documents (such as custodian-related documents) stored in the repository.
- **Allow Record-level repository access in Connect**
  Default is No. If Yes is selected, this party will be able to access actual records received stored in the repository. You should leave this checkbox blank unless this party is a co-counsel to the scheduling party.

2. To save information:
   - In **Edit Party** panel, click **Save.**
   - In **New Party** panel, click **Save >**
     - **Save & Edit –** To continue adding information about the party in the **Edit Party** panel.
     - **Save & Close –** If you don't have more information to include about the party or additional parties to add.
     - **Save & New –** To add another party without leaving the **New Party** panel. Automatically opens **Lookup Firm** panel to search for another order party.
3. Click **Save** in the Edit Order window.

Reference

- Parties
- Date Navigator
- Lists > Orders
- MR Connect

Step-by-step instructions

- Adding parties
- Updating parties
- Looking up firms
- Adding contacts to MR9
- Entering dates & times
- Entering preferred or requested services

Entering party billing information

You can enter billing information for a party — such who to bill and insurance information — when adding parties or anytime afterwards.

Continued from Adding parties or Updating parties.

1. In the **New Party/Edit Party** panel of an Edit Order window, scroll or jump to the **Billing Info** pane.
2. In the **Billing Info** pane:
   - **Billing Rate Group & Billing Rate**

     Defaults comes from the settings for the Sold To contact in the contact's profile. (See Entering contact marketing information.)

     - To override the defaults for this order, click ⋙ **> Lookup Billing Rate.** See Looking up billing rate tables.
     - If **Billing Rate** is blank, click to select a billing rate table. See Looking up billing rate tables.
     - You can override the assigned billing rate when invoicing order parts. See Applying billing rates to one or more invoices.
   - **Same as Sold To**
     - **If invoices are to be sent to this party:** Slide to Yes. **Bill To Contact** will default to the **Contact** listed in the **General** pane. If a different contact at the firm should receive invoices and statements, click again to select No and select a different contact from the **Bill To Contact** dropdown.
     - **If invoices are to be sent to a third party:** Leave as No, and select a different firm and contact in the **Bill To Firm** and **Bill To Contact** fields. See Looking up firms.
   - **E-billing**

     The rest of the fields in the **Billing Info** pane are for e-billing. If the Bill To client requires e-billing, see Entering electronic billing information.
3. To save information:

   In **New Party/Edit Party** panel, click **Save >**

   - **Save & Edit –** To continue adding information about the party in the **Edit Party** panel.
   - **Save & Close –** If you don't have more information to include about the party or

additional parties to add.

- **Save & New –** *(New Party panel only)* To add another party without leaving the **New Party** panel. Automatically opens **Lookup Firm** panel to search for another order party.

4. If done entering order information, click **Save > Save & Close** in the Edit Order window.

NOTE: Entering party billing information at Turn In

If you do not have billing information before an order is completed, you can enter it in Turn In when creating invoices. See Adding general billing information to invoices.

Reference

- Parties
- Billing Rate Group
- Sold To vs. Bill To
- Electronic billing
- Turn In

Step-by-step instructions

- Adding parties
- Updating parties
- Entering contact marketing information
- Looking up billing rate tables
- Applying billing rates to one or more invoices
- Looking up firms
- Entering electronic billing information
- Adding general billing information to invoices

Entering electronic billing information

You can enter e-billing information for a party when adding them to an order — or anytime afterwards, including during Turn In.

Continued from Adding parties, Updating parties or Adding billing information to invoices.

1. To enter e-billing information for a party:

   - **In an order**
     In the **New Party/Edit Party** panel, scroll or jump to **Billing Info** pane.

   - **During Turn In, Export Invoices, or Invoice Inquiry**
     In the **Edit Invoice** panel, scroll or jump to **Additional** pane.

2. Enter/update text or make selections:

   - **Client Matter No.**
     If provided by the client this number, which consists of a number designating the client combined with a number designating the case, will be printed on the invoice. This number is required for electronic billing in MR9. See Exporting invoices in LEDES format.

   - **Claim No.**
     Insurance claim number

   - **Name of Insured**
     Insured individual's name

   - **Date of Loss**
     Date of incident

   - **Direct Billing Notes**
     Unlimited character count. In the case of direct billing (i.e., Bill To is different from Sold To), any text entered here appears on the invoice along with **Claim No., Name of Insured,** and **Date of Loss.** To customize the appearance of the notes, see Customizing notes & messages. Text customizations will appear on the invoice.

   - **Client ID for LEDES 1998B**
     The party's ID number for electronic billing. When exporting invoices in LEDES 1998B format, this entry will be used for CLIENT_ID. See Electronic billing.

3. To save information:

   - In **New Invoice** panel, click **Save.**

   - In **New Party/Edit Party/Edit Invoice** panel, click **Save >**

- **Save & Edit –** To continue adding information about the party in the **Edit Party** panel.
- **Save & Close –** If you don't have more information to include about the party or additional parties to add.
- **Save & New –** *New Party panel only.* To add another party without leaving the **New Party** panel. Automatically opens **Lookup Firm** panel to search for another order party.

Reference

- Turn In
- Parties
- Date Navigator
- Sold To vs. Bill To
- Electronic billing
- LEDES format

Step-by-step instructions

- Adding parties
- Updating parties
- Adding billing information to invoices
- Exporting invoices in LEDES format
- Entering dates
- Customizing notes & messages
- Adding billing information to invoices

Entering preferred or requested services

If a party to an order has standing orders/preferred services or has requested specific services for this order, you can enter that in their party information to speed up invoice generation later.

Continued from Adding parties or Updating parties.

1. Check for standing orders

When adding services to a party, save time and reduce errors by checking first so you do not overlook any standing orders/preferred services in the firm/contact's MR9 listing. (See Adding standing requests.)

1. In an **Edit Party** panel, scroll or jump to **Requested Services.**
2. Click **> Prefill Services.**
3. In the **Prefill Services** panel, your client's standing orders (if any) appear, grouped by firm and contact. In the **Preferred Services** pane, check either the box:
   - Next to each service the contact has requested for this order.
   - In the **Service Item** header to select all the services.
4. Click **Save.** The **Prefill Services** panel closes and the preferred services appear in the **Requested Services** pane.

2. Add new requests

After checking for any preferred services, add service items the contact requested for an order that are not included in their standing orders.

1. If after using Prefill Services, you have more services ordered by the party, click in the Edit Party's **Requested Services** pane.

   In the **New Requested Service** panel, enter text or select options:

   - **Service Group**

     Defaults to 9. Misc. Charge. Most requested services will appear in subgroups here. Change if needed. (Service listings and their groups are set in Setup. See Service Item Subgroups and Service Item Master.)

   - **Service Subgroup**

     Select the relevant service subset in the dropdown. Only those service items belonging to the selected subgroup appear in the **Service Item** dropdown below.

- ***Service Item**

  Required. Service requested.

- **Units**

  Update the default number of units to be billed, if needed.

- **Split(%)**

  If several parties are sharing the cost of this service item, the percentage allocated for this party (e.g., "50.000" for one half or "33.333" for one third).

- ***Effective From**

  Required. Appears in services for parties to an order, not individual parts. Default is today. Use Date Navigator to change default if desired. Parts created from the order going forward from the **Effective From** date will include the requested service.

- **Inactive From**

  Use if a service will no longer be required for parts in an on-going order. Appears in services for parties to an order, not individual parts.

- **Delivery Method**

  Requested or expected delivery method. (Options are set in Lists > Production.)

- **Turnaround Type**

  Select how how fast the client wants the service in the dropdown. (Turnaround speed options and default are set in Lists > Contacts.)

- **Due in days**

  Default number come from the firm's preferences first (see Adding standing requests); then if that is blank, from the business unit's preferences (see Setting up business units). You can override the default by entering a number in this field.

- **Instructions**

  Any information your staff needs about the requested service in the field.

2. In the **New Requested Service** panel, click **Save >**

   - **Save & New:** To save the service to the party and add more services.
   - **Save & Close:** When you have no more services to add to the party.

3. **Save entries**

   1. Click **Save > Save & Close** in the **Edit Party** panel.
   2. When done entering order information, click **Save > Save & Close** in the Edit Order window.

Reference

- Parties
- Service items
- Service Item Subgroups
- Service Item Master
- Date Navigator
- Lists > Production
- Lists > Contacts

Step-by-step instructions

- Adding parties
- Updating parties
- Adding standing requests
- Setting up business units

Updating parties

Edit a party's information, add notes to the party, inactivate the party going forward, or delete the party from the order.

1. In the **Parties** pane of an Edit Order window, click the hyperlinked **Contact.**
2. In the **Edit Party** panel, to:
   - **Edit the party's information**

     To update general information, such as what their role is and what privileges they get, see Entering general party information.

     To update billing information, such who to bill and insurance information, see Entering party billing information.

     To update standing requests, see Entering preferred or requested services.

     To update waiver responses or copy orders, see Recording waiver responses.

     To make notes on the party, such as what action was taken, see Making entries in notes logs.

   - **Keep the party in the order but not in future order-related parts**

     Enter the date in **Inactive From,** or click to select the date in the Date Navigator.

   - **Delete the party**

     To remove the party from the order entirely, click **Delete.** Then click **Yes** in the popup. You cannot delete the order's scheduling party.
3. In **Edit Party** panel, click **Save** if the panel didn't close automatically.
4. When done entering order information, click **Save > Save & Close** in the Edit Order window.

Reference

- Parties
- Date Navigator

Step-by-step instructions

- Updating orders
- Adding parties
- Entering general party information
- Entering party billing information
- Entering preferred or requested services
- Recording waiver responses
- Making entries in notes logs

Recording waiver responses

As order parts (record requests) are entered, they automatically appear in every party to the order. In MR9 a waiver doubles as a copy order form. As waivers come back from the parties (attorneys of record), record their responses as waivers or copy orders, then upload the forms to the repository. MR9 uses this information to pre-fill the billing parties in Turn In. (See Prefilling parties & services.)

Continued from Adding parties or Updating parties.

1. In an **Edit Party** panel, scroll or jump to **Waiver Response.**
2. All parts to the order are listed. Check boxes in:
   - **Waived** – For records the party has declined to order.
   - **Copy** – For records the party has requested copies of.
3. In the **Edit Party** panel, click **Save >**
   - **Save & Edit –** To continue adding information about the party in the **Edit Party** panel.
   - **Save & Close –** If you don't have more information to include about the party or additional parties to add.
4. When you close the **Edit Party** panel, upload the party's waiver response(s) to the repository in the order's Edit Order window. To add files to the order's repository, see Uploading files to a repository.
5. When done entering order information, click **Save > Save & Close** in the Edit Order window.

BEST PRACTICES: Save waivers in your repository

Having the signed waivers (i.e., copy order forms) in the repository will help your collection efforts. When clients refuse to pay invoices claiming they did not order copies of records, you can quickly prove otherwise by emailing them a copy without spending hours looking through filing cabinets.

Reference

- Parties
- Part

Step-by-step instructions

- Prefilling parties & services
- Adding parties
- Updating parties
- Uploading files to a repository

Using custom dates

If the case related to the order has dates other than trial dates — such as dates for depositions or mediation — you can include those dates in the order. Then you can search for orders by custom dates, view/update/delete custom dates, and view your history of actions on custom dates for an order.

- ## Add custom dates

  Continued from Updating orders.

  1. In an Edit Order window, scroll or jump to the **Custom Dates** pane, and click .
  2. In the **New Custom Date** panel, select the type of date you are adding in the ***Date Name** dropdown. (Date Names and default are set in Lists > Orders > Custom Date.)
  3. in ***Date,** enter the scheduled date. See Date Navigator.
  4. Click **Save >**
     - **Save & New** –To save the date and enter another one.
     - **Save & Close** – To save the date and close the window.
  5. MR9 adds the date(s) to the **Custom Dates** pane and logs their entry information in the **Custom Dates History Log.**
  6. If continuing to add/update information, see Updating orders.

- ## Update custom dates

  1. In **Orders > Orders,** search for the order you want to update custom dates for by **Custom Date Name** and **Custom Date From/Custom Date To.** See Searching orders.
  2. In the Edit Order window, scroll or jump to the **Custom Dates** pane, and click the hyperlinked **Date Name** of the date you want to view/update.
  3. In the **Edit Custom Date** panel, to:
     - **Change the date** – Enter or select a new scheduled date in ***Date,** See Date Navigator.
     - **Delete the custom date** – Click **Delete.**

- ## View custom date history

1. In **Orders > Orders,** search for the order you want to view the custom date history for by **Custom Date Name** and **Custom Date From/Custom Date To.** See Searching orders.

2. In the Edit Order window, scroll or jump to the **Custom Dates** pane, and click **> View Custom Dates History.**

3. In the **Custom Dates History Log** pane, all custom date history activity is displayed in descending chronological order and includes the action's date and time, MR9 user responsible, custom date name and date, and what action was taken.

4. When finished viewing, click **Close.**

Reference

- Lists > Orders
- Date Navigator

Step-by-step instructions

- Updating orders
- Searching orders

Changing order or part status

MR9 automatically changes the status of an order or part in some instances, such as when an order is turned in. You can also update the status of an order or part manually.

If an entire case is canceled, put on hold or dismissed, change the status at the order level, not at the part (work order) level.

1. In the **General** pane of an Edit Order/Edit Part window, current status appears in **Status** field.
2. To update the status, click ▽ **> Change Status.**
3. In the **Change Status** panel, select the new status from the ***Status to be** dropdown *(required).* (Status options and defaults are set in Lists > Orders and Lists > Parts.)
4. Enter any notes about the status change in **Remarks.** Remarks are stored in the **Status History** log.
5. Click **Save.**
6. If finished updating the order/part, click **Save > Save & Close** in the Edit Order/Edit Part window.

TIP: Quickly change part status for one or more parts

If work orders are canceled, put on hold, or their subpoena quashed, you can quickly change the status of the parts. In Parts or Orders in Progress results grids, select the part(s) you want to change the status of, then click **Action > Change Part Status** and follow the instructions above. See Updating parts or Analyzing work order progress.

NOTE: New order or part status

In a New Order or New Part window, **Status** can't be changed. Save the order/part first, then change the status.

NOTE: Viewing status history

In an Edit Order/Edit Part window, click **Status** field's ▽ **> View Status History** to see the log of status changes, when they happened, who was responsible, and any remarks they entered at the time.

Reference

- Lists > Orders
- Lists > Parts
- Parts
- Orders in Progress

Step-by-step instructions

- Starting orders
- Adding parts to orders
- Updating parts
- Analyzing work order progress

Bulk updating orders

If you have two or more orders that need the same information changed, save time by changing all of the affected orders at once.

Continued from Updating orders.

1. In the **Bulk Update** popup, select the field you want to update in the **Choose field to update** dropdown:
   - **Client Rep** – Representative who oversees orders on behalf of the clients.
   - **Ordered By Contact** – Client who is responsible for records or services ordered.
   - **Processor** – Case coordinator.
   - **Start Date** – Date you planned to start working on the orders.
   - **Warning** – Alerts that one must be aware of regarding the orders.
2. Depending on the field you chose to update, enter or select the new information in the **Set value to** field. For:
   - **Client Rep**

     Click to find and apply the same client representative to all the orders. See Lookup panel.
   - **Ordered By Contact**

     Click to find and apply the same contact to all the orders. See Lookup panel.
   - **Processor**

     Click to find and apply the same case coordinator to all the orders. See Lookup panel.
   - **Start Date**

     Set value to – Enter or select a date in the Date Navigator.
   - **Warning**

     Enter the common warning/alerts for all the orders.
3. Click **Update.** Then click **OK** in the popup that appears. The **Bulk Update** popup remains open if you want to keep updating the same orders. When finished updating, click **Cancel** to close the popup.

Reference

- Client Rep
- Lookup panel
- Date Navigator

Step-by-step instructions

- Updating orders

Deleting orders

You can only delete orders that have no parts or any other historical data.

1. To delete an order:
   - **From the Orders main screen,** find the order you want to delete (see Searching orders) and click its **> Delete.**
   - **In a View Order/Edit Order window**, click **Delete.**
2. Click **Yes** in the popup that appears. If there are:
   - **No parts/historical data in the order,** the order will be deleted.
   - **Parts/historical data in the order,** a popup will appear telling you the order cannot be deleted. Click **OK.**
3. For orders you can't delete, change their status to Cancel instead. See Changing order or part status.

Reference

- Order
- Part

Step-by-step instructions

- Searching orders
- Updating orders
- Changing order or part status

Part

A part of an order is a separate record that is being sought that is included in the entire body of records for a case or patient. You can also think of it as the work order for that separate record.

Reference

- Order
- Lists > Parts

Step-by-step instructions

- Adding parts to orders
- Updating parts

Entering general part information

When you create a new part, the only information you are required to include is the location you will contact for records/serve with a subpoena. You can enter or update the part's information at any time including information about the location and records ordered.

Continued from Adding parts to orders or Updating parts.

In the New Part/Edit Part window, **Order.Part No.** is assigned by the system and is uneditable. Enter text or make selections in the **General** pane:

- ***Location**

  Required. Custodian of the records/where the records are to be retrieved from. See Looking up locations.

- **Department & Location Warning**

  Uneditable. If they need editing, click ***Location** **> View Location.** See Updating locations.

- **Contact**

  Name of the contact at the location. Default comes from the selected location. Enter a different name, if applicable.

- **Record Type**

  Category of records you are seeking. (Record Types and default are set in Lists > Parts.)

- **Rush**

  Default is No. Slide to Yes if this is a rush order.

  TIP: View rush status in results grids of several functions

  Orders, Parts, Notify Runners, Daily Orders Audit, Orders in Progress, and Orders Turnaround include a **Rush** or **Part Rush** column in their main grids, so you can see at a glance which parts are rush orders.

- **Status**

  Stage of record retrieval *(uneditable in New Part window.* To change the status, see Changing order or part status.

- **Records Of**

  Uneditable. To update the patient/subpoenaed witness name, click its . See Entering patient & other records information.

- **SSN, Date of Birth, Order Warning, & Processor**

  Uneditable. To update, click **Records Of** . See Entering patient & other records information and Entering general order information.

- **Order Date**

  Default is today/date part was entered into MR9. To change it, use the Date Navigator.

- **Due Date**

  If left blank, MR9 automatically calculates this date by adding the **Order Due In** days to the **Order Date.** See Entering BU preferences. Enter a different date, if desired See Date Navigator.

Reference

- Order
- Lists > Parts
- Date Navigator

Step-by-step instructions

- Adding parts to orders
- Updating parts
- Looking up locations
- Updating locations
- Changing order or part status
- Entering patient & other records information
- Entering general order information
- Entering BU preferences
- Entering additional part information
- Scheduling pickups
- Setting up part forms
- Moving work to the next step
- Entering services to be billed
- Entering & updating check request details
- Uploading files to a repository
- Making entries in notes logs

Adding status notes to multiple parts simultaneously

If you want the same information in Status Notes to appear in multiple parts (work orders) you have for the same order/case, instead of retyping it or copying and pasting, enter it once then copy it into one or more other parts.

Continued from Entering additional part information.

1. Copy the common information in the **Status Notes** field you want to duplicate in other parts of the same order.
2. Click ▽ **> Add Status Notes to other parts.**
3. In the **Add Status Notes** panel, click:
   - **Replace Status Notes** – To overwrite any existing status notes.
   - **Append Status Notes** – Default. To add this note to what already exists. Select a method to separate the combined notes in the dropdown.
4. Paste or key in the common information in the ***Status Notes** pane and format it, if desired. See Customizing emails, messages & web pages.
5. In the **Add To** pane, check the boxes of parts you want to copy the status notes to.
6. Click **Save.** MR9 copies the status note to the selected parts and closes the panel.

Reference

- Order
- Part

Step-by-step instructions

- Adding parts to orders
- Updating parts
- Entering additional part information
- Customizing emails, messages & web pages

Scheduling pickups

Assign runners to pick up records, record the outcome of your contacts with custodians to make arrangements for records, and enter specific instructions for the runner/field agent assigned to pick up records. Each time you contact a custodian to make an arrangement for records, you should record the outcome. In addition, you can set a follow-up date, if further actions are required.

Continued from Adding parts to orders or Updating parts.

1. In the New Part/Edit Part window, enter text or make selections in the **Schedule Pickup** pane:

   - **Scheduled Date**

     Enter the date for the pickup or mailing. See Date Navigator.

   - **Scheduling Type**

     Select the method to be used for the pickup in the dropdown. (Scheduling Types and default are set in Lists > Parts.)

   - **Scheduling Notes**

     Record the outcome of contacts with the custodian.

   - **Runner**

     Click to assign a user for the pickup. See Looking up users. When you assign/change/delete a runner and save the part, MR9 records that information in the part's Notes Log.

     TIP: Assign the right runner for the job

     If you keep track of which users know specific locations best by designating expeditors (see Entering additional location information), check a location's listing before assigning a runner for the pickup:

     In the New Part/Edit Part window's **General** pane, click the **Location** **> View Location.** Then in the **View Location** panel's **Additional** pane, see if a user appears in the **Expeditor field.** Assign that user as the runner for this pickup.

   - **Pickup Notes**

     Enter instructions for the runner and other information about the location that would be helpful.

   - **ROI Handled By**

     If a different location/entity is designated to handle the release of information for this location (e.g., SDS), it appears here. Click to view/update their information. See Updating locations.

2. If you contacted the custodian to make an arrangement for records:
    1. Scroll or jump to the **Additional Info** pane to record the outcome.
    2. Click **Action Date** **> New Action.**
    3. In the **New Action** panel, select what action you took in the ***Action Type** dropdown. (Action Types and default are set in Lists > Parts.) Then select today in the ***Action Date** Date Navigator.
    4. Enter the action's outcome in the **Details** field.
    5. Click **Save.**
3. To set a follow-up date if further actions are required:
    1. Scroll or jump to the **Additional Info** pane to record the outcome.
    2. Click **Action Date** **> New Action.**
    3. In the **New Action** panel, select what action you will take in the ***Action Type** dropdown. (Action Types and their default are set in Lists > Parts.) Then select the future date for that action in the ***Action Date** Date Navigator.
    4. Enter information about the follow-up action to be taken in the **Details** field.
    5. Click **Save. Action Type** and **Action Date** appear in the Parts results grid so you can keep track without having to go into a part's detail screen.
    6. After assigning runners, send them their worksheets. See Notifying runners (field agents).

Reference

- Date Navigator
- Lists > Parts
- Notes Log

Step-by-step instructions

- Adding parts to orders
- Updating parts
- Looking up users
- Entering additional location information
- Updating locations
- Notifying runners (field agents)

- Entering general part information
- Entering additional part information
- Setting up part forms
- Moving work to the next step
- Entering services to be billed
- Entering & updating check request details
- Uploading files to a repository
- Making entries in notes logs

Setting up part forms

Enter the scope and related information. Add form attachments, such as interrogatories, to the part.

Continued from Adding parts to orders or Updating parts.

In the New Part/Edit Part window, enter text or make selections in the **Forms** pane:

- **Service Date From/Service Date To**

  If the scope contains a service date range, enter the beginning and ending dates. See Date Navigator.

- **Scope**

  Enter a description of the scope that will appear on documents or click to select a pre-set scope description in the **Lookup Scope** panel. See Lookup panel. (Scopes are set upin Setup > Scopes. See Setting up scopes.)

  You can insert a data field in the scope by clicking your cursor in the text where you want the data field, then clicking **> [category] > [data field].** The data fields available are contextual, meaning that only data fields relevant to scopes are listed.

- **Scope Attachment**

  If you prefer to attach the scope as an exhibit or have a supplemental scope form, click to select from the predefined attachments. These attachments must be MR9 forms created using Form Templates. (See Creating/updating forms & letters.)

- **Interrogatory**

  To include an interrogatory (set of questions to be answered by the adversary in a case in order to clarify matters of fact in advance of a trial), click to select from your predefined interrogatories. Interrogatories must be MR9 forms created using Form Templates. (See Creating/updating forms & letters.)

Reference

- Order
- Part
- Date Navigator
- Scopes
- Form Templates

Step-by-step instructions

- Adding parts to orders

- Updating parts
- Setting up scopes
- Creating/updating forms & letters
- Entering general part information
- Entering additional part information
- Scheduling pickups
- Moving work to the next step
- Entering services to be billed
- Entering & updating check request details
- Uploading files to a repository
- Making entries in notes logs

Finding parts

When adding parts to an order or at any time later, you can add to or edit the part's information. You can also access related functions with the selected part's information already filled in to save time.

Continued from Updating parts or Updating multiple parts at once.

1. Find parts to update in these functions:

   - **Orders > Parts**

     For editing single or multiple parts at once

     If you know the order number, this is the fastest way to find all of the parts for a single order:

     1. Enter the entire order number in **Order No.** in the **Search By** pane, then click .
     2. The order's details appear in the **Order Info** pane and its parts appear in the results pane. To edit a single part, click:
        - **> Edit** next to the hyperlinked **Part No.**
        - The hyperlinked **Part No.,** then click **Edit** in the View Part window.

   - **Orders > Orders**

     For editing single or multiple parts at once

     1. If you don't know the order number related to the part(s), search for the order (see Searching orders), then access the order's list of parts:
        - **Orders results grid**

          Click **> Parts** next to the hyperlinked **Order No.**

        - **Inside the order**

          Click the order's hyperlinked **Order No.** In the View Order/Edit Order window, click **More > Parts.**
     2. All parts tied to the order appear in the Parts window. To edit a single part, click:
        - **> Edit** next to the hyperlinked **Part No.**
        - The hyperlinked **Part No.,** then click **Edit** in the View Part window.

   - **Orders > Tracking**

     For editing single or multiple parts at once

1. Find the part(s) you want to update using Tracking's search criteria. See Searching tracking.
2. All parts that meet your search criteria appear in the results grid. To edit a single part, click:
   - **> Edit** next to the hyperlinked **Part No.**
   - The hyperlinked **Order.Part No.,** then click **Edit** in the View Part window.

- **Orders > Orders in Progress**
  For editing single or multiple parts at once

  1. Find the part(s) you want to update using Orders in Progress's search criteria. See Analyzing work order progress.
  2. All parts that meet your search criteria appear in the results grid. To edit a single part, click:
     - **> Edit** next to the hyperlinked **Order.Part No.**
     - The hyperlinked **Order.Part No.,** then click **Edit** in the View Part window.

- **Orders > Daily Orders Audit**

  For editing single parts only

  1. Find the part you want to update using Daily Orders Audit search criteria. See Auditing orders.
  2. All parts that meet your search criteria appear in the results grid. To edit a single part, click:
     - **> Edit** next to the hyperlinked **Order.Part No.**
     - The hyperlinked **Order.Part No.,** then click **Edit** in the View Part window.

- **Orders > Processed Orders**

  For editing single parts only

  1. Find the part you want to update using Processed Orders search criteria. See Monitoring processed work orders.
  2. All parts that meet your search criteria appear in the results grid. To edit a single part, click the hyperlinked **Part No.,** then click **Edit** in the View Part window.

- **Production > Turn In**

  For editing single parts only

1. In the Turn In results grid or a Bulk Turn In's **Parts to create invoices** pane, click the hyperlinked **Order.Part No.**
2. In the View Turn In/Edit Turn In - [#] window, click the **Order.Part No.'s** .

- **Production > Repository**

  For editing single parts only

  You can access parts in several Repository levels (see Viewing & updating repository file details):

  - **Part level**
    Find the part. Then in the part's View Repository window, click its **Order.Part No.'s** .
  - **Order level**
    Find the part's order. Then in the order's View Repository window, click its **Records Of's** . In the **View Order** panel, click **Parts.** Then click the part's hyperlinked **Part No.** in the **Parts – Order [#]** panel.
  - **Record level**

    Find the part's record. Then in the record's View Repository window, click its **Order.Part No.'s** .

    Or in the record's View Repository window, click its **Records'** . Then in the **View Record** panel, click **Part No.'s** .
  - **Invoice level**
    Find the part's invoice. Then in the invoice's View Repository window, click **Invoice No.'s** . In the View Invoice window's General pane, click **Order.Part No.'s** .

2. In a results grid if you want to update multiple parts at once, see Updating multiple parts at once.

Reference

- Order
- Part

Step-by-step instructions

- Updating parts
- Updating multiple parts at once
- Searching orders
- Searching tracking
- Analyzing work order progress
- Auditing orders
- Monitoring processed work orders
- Viewing & updating repository file details

Creating new parts from old parts

If you are getting records from several departments of a major hospital, you might have to create a separate work order for each record type (department). Save time and reduce errors by copying an existing part and entering only the new information.

Continued from Adding parts to orders or Updating parts.

1. Yoiu can copy a part from:
   - **Orders > Parts results grid** – Click **> Copy** next to the part you want to copy.
   - **Individual Edit Part window** – Click **More > Copy.**
2. MR9 copies the information from the existing part into a new part, except:
   - **General** – **Status** and **Due Date.**
   - **Additional Info** – **Depo Date, Action Type, Action Date, Action Detail,** and **Status Notes.**
   - **Schedule Pickup** – Nothing is copied, and **Scheduling Type** reverts to default.
   - **Forms** – Everything is copied.
   - **Tracking** – Nothing is copied, and **Tracking Item** reverts to default.
3. In the **General** pane:
   - Click ***Location** **> View Location.** Then click **Edit** in the **View Location** panel and select a different **Department** in the dropdown. Click **Save > Save & Close** in the **View Location** panel.
   - Select a different **Record Type** in the dropdown.
4. In the **Forms** pane, change the scope and interrogatory, See Setting up part forms.
5. Make other changes in the new part, if needed. See Updating parts.
6. Click **Save >**
   - **Save & Edit** – Additional panes for **Services, Fee Checks, Repository,** and **Notes Log** appear. To continue adding information to the saved part. See Updating parts.
   - **Save & Close** – To save your work and close the window.
   - **Save & New** – To start a new part related to the same order. The part is assigned a part number, and is replaced in the New Part window with a new blank part that includes the same **Records Of** information.

Reference

- Order
- Part
- Tracking

Step-by-step instructions

- Adding parts to orders
- Updating parts
- Entering general part information
- Entering additional part information
- Scheduling pickups
- Setting up part forms
- Moving work to the next step

Entering services to be billed

As work orders move through the various departments, you can record billable services as they occur so that the billing department has complete and accurate information to generate invoices. You can add services to individual parts or insert a service item into all selected parts of an order at once.

All of the service items entered here will be automatically available to add to invoices for the part in Turn In.

Continued from Updating parts or Updating multiple parts at once.

1. To:
   - **Add a service item to a part** – In an Edit Part window, click in the **Services** pane.
   - **Insert a service item into all selected parts of an order at once** – In a results grid, check the boxes for entries to select them, then click **Actions > Bulk Insert Service.**
2. Make selections in the **New Service** panel/popup:

1. Select service

1. Service Group

Default is 9. Misc. Charge. Most requested services will appear in subgroups here. Change if needed. (Service listings and their groups are set in Setup. See Service Item Subgroups and Service Item Master.)

2. Service Subgroup

Select the relevant service subset in the dropdown. Only those service items belonging to the selected subgroup appear in the **Service Item** dropdown below.

3. *Service Item

Select a service item in the dropdown.

2. Select options

- **Units**
  Update the default number of units to be billed, if needed.
- **Billing Rate**
  Enter the unit price, if known at this time.

- **Split(%)**

  If several parties are sharing the cost of this service item, enter the percentage allocated for this party (e.g., "50.000" for one half or "33.333" for one third).

- **Remarks**
  Enter any other information about this service item.

3. ## Save service item

   In the **Edit Service** panel/**New Service** popup, click **Save >**

   - **Save & New** – *(New Service popup only)* To save the service item and add another.
   - **Save & Edit –** *(Edit Service panel only)* To save the service item and continue updating it.
   - **Save & Close** – When you have no more service items to add.

   MR9 adds/updates the service(s) with default rates (set in Service Item Master) to the part(s) selected.

TIP: Copy multiple requested services from one part to others

After entering service items on a part, you can quickly copy one or more services to other parts in the same order. This is faster than using **Bulk Insert Service** — which enters one service into multiple parts at the same time — or entering services in each part individually. See Copying multiple services from one part to others.

Reference

- Order
- Part
- Prefill
- Service Item Subgroups
- Service Item Master

Step-by-step instructions

- Updating parts
- Updating multiple parts at once
- Adding & updating services
- Copying multiple services from one part to others
- Entering general part information
- Entering additional part information
- Scheduling pickups
- Setting up part forms
- Moving work to the next step
- Entering & updating check request details
- Uploading files to a repository
- Making entries in notes logs

Copying multiple services from one part to others

If parts in the same order have more than one of the same requested services, instead of using **Bulk Insert Service** — or entering them in each part individually — set the services up in one part, then copy them to other parts at once.

Continued from Entering services to be billed.

1. After entering the service items in a part's Edit Part window, check the boxes of services you want to copy to other parts in the same order.
2. In the **Services** pane header, click **> Copy To.**
3. In the **Select Parts** panel, any other parts in the same order are listed. Check the boxes of parts you want to copy the services to.
4. Click **Save.** MR9 copies the services to the selected parts and closes the **Select Parts** panel.

Reference

- Order
- Part

Step-by-step instructions

- Entering services to be billed
- Updating parts
- Updating multiple parts at once
- Adding & updating services

Entering & updating fee check requests in parts

When a custodian requires payment for producing records, enter a fee check request while you are scheduling a pickup or mailing. You can also update or delete a request if you haven't issued a check number or credit card payment authorization for it.

When you turn in the part using **Prefill Orders & Services** (see Prefilling parties & services), MR9 will include a service item, Custodian Fee, on the scheduling party's invoice by adding up the check amounts entered here. The markup, if any, is calculated and added to the Custodian Fee at the same time.

Continued from Updating parts.

In the Edit Part window's **Fee Checks** pane, any check requests for the part that have already been issued appear in the grid. To:

- **Enter the custodian's fee request**

  Click in the **Fee Checks** pane. See Entering & updating check request details.

- **View an existing request**

  Click its hyperlinked **Check No./Credit Card No.**

- **Edit an existing request**

  Click its hyperlinked **Check No./Credit Card No.** To edit check details, click **Edit** in the **View Check** panel. See Entering & updating check request details.

- **Delete an existing request**

  Click its hyperlinked **Check No./Credit Card No.** If the request has not been processed yet, you can delete it by clicking **Delete** in the **View Check** panel.

Reference

- Part
- Prefill

Step-by-step instructions

- Updating parts
- Entering & updating check request details
- Prefilling parties & services

Updating multiple parts at once

There are several options in parts that you can update at the same time from results grids.

Continued from Updating orders, Adding parts to orders, Generating a task list, or Analyzing work order progress.

1. Find the parts

You can update multiple parts at the same time in several functions in the **Orders** module. See Finding parts.

2. Update information

Check boxes in the results pane to select parts to update. Then click **Actions >**

- **Add Notes Log/Add Part Notes Log**

  To add the same entry to each part's Notes Log. See Making entries in notes logs.

- **Change Tracking Step**

  In Tracking only

  To move all of the selected parts to the next step. See Moving work to the next step.

- **Change Part Status**

  To update the status of all selected parts to the same status. See Changing order or part status.

- **Bulk Update**

  Not in Orders in Progress

  To update certain details in part listings, such as the **Action Date, Runner,** or **Scope.** See Bulk updating parts.

- **Bulk Insert Service**

  Not in Tracking or Orders in Progress

  To add the same service item to all of the selected parts. See Entering services to be billed.

- **Send Forms**

  Not in Tracking or Orders in Progress

  To email, preview, print, or download forms related to the order, see Sending forms.

- **Bulk Turn In**

  Not in Tracking or Orders in Progress

  To begin turning in multiple parts for the same order — for example to close out an order when the case settles. See Creating invoices for multiple parts at once.

Reference

- Results pane
- Notes Log
- Turn In

Step-by-step instructions

- Updating orders
- Adding parts to orders
- Generating a task list
- Analyzing work order progress
- Finding parts
- Searching orders
- Making entries in notes logs
- Moving work to the next step
- Changing order or part status
- Bulk updating parts
- Entering services to be billed
- Sending forms
- Creating invoices for multiple parts at once

Bulk updating parts

If you have two or more parts to an order that need the same information changed, for example, the depo date changed for multiple parts, save time by changing all of the affected parts at once.

Continued from Updating multiple parts at once.

1. After clicking **Action > Bulk Update** in a Parts window, the **Bulk Update** popup appears. Select the field you want to update in the **Choose field to update** dropdown.
2. Choose the action you are updating in ***Action Type** *(required).* (Action Types and default are set in Lists > Parts.)
3. Depending on the ***Action Type,** enter text or select options in the fields that appear:
   - **Action Date & Type**
     - ***Action Date** field *(required)* – Enter or select a follow-up date in the Date Navigator.
     - **Detail** – Enter information about the action to be taken.
   - **Depo Date**

     Set value to – Enter or select date and time of the deposition, either oral or written, in the Date Navigator. See Entering dates & times.
   - **Due Date**

     Set value to – Enter or select a date in the Date Navigator.
   - **Interrogatory**

     Set value to – Click to find and apply the same interrogatory to all the parts. See Lookup panel.
   - **Order Date**

     Set value to – Enter or select a date in the Date Navigator.
   - **Record Type**

     Set value to – Select a category for the parts' records. (Record Types and default are set in Lists > Parts.)
   - **Runner**

     Set value to – Click to find and assign the same field agent to all the parts. See Looking up users.

- **Rush**

  Set value to – Default is No. Slide to Yes if you want all the parts to be rush orders.

- **Scheduled Date**

  Set value to – Enter or select a date in the Date Navigator.

- **Scope**

  Set value to – Enter a description of the scope that will appear on documents or click to select a pre-set scope description in the **Lookup Scope** panel. See Lookup panel. (Scopes are set in Setup > Scopes.)

  You can insert a data field in the scope by clicking your cursor in the text where you want the data field, then clicking **> [category] > [data field].** The data fields available are contextual, meaning that only data fields relevant to scopes are listed.

4. Click **Update.** Then click **OK** in the popup that appears. The **Bulk Update** popup remains open if you want to keep updating the same parts. When finished updating, click **Cancel** to close the popup.

Reference

- Lists > Parts
- Date Navigator
- Lookup panel
- Scopes

Step-by-step instructions

- Updating multiple parts at once
- Entering dates & times
- Looking up users

Tracking Item

In MR9 Tracking, a tracking item is a workflow specific types of orders go through. For example your process for records retrieval would be a tracking item and the steps in a workflow are called tracking steps. If you have different workflows for different types of records retrieval — or other services you provide like process serving — you can set up multiple tracking items.

Because every company's workflows are specific to the individual company, you set up your own workflows in MR9. You set up your tracking items in Lists > Tracking, then define the tracking steps for each tracking item in Tracking Steps.

Reference

- Tracking
- Lists > Tracking
- Tracking Steps

Step-by-step instructions

- Defining tracking steps

Searching tracking

Search for work orders in Tracking using a wide variety of search filters. Customize Tracking's results grid to show information in the order that works best for you, including grouping orders by additional/different criteria. Update individual parts or multiple parts at once from the Tracking results grid.

1. **Orders > Tracking**
2. In the Tracking window's **Search By** pane, no particular filter is required but you must use at least one:

   - **Tracking Item**

     Default is ALL. Click ▾ to choose a specific type of item/workflow you track. (Tracking Item categories are set in Lists > Tracking.)

   - **Tracking Step**

     Default is ALL. Works with **Tracking Item.** Select a tracking item above, then click to choose one or more steps it takes in your work process that you track. (Tracking Steps are set in Setup > Tracking Steps.)

   - **Assign To**

     Click to select a single user who is responsible for the tracking step(s) above. See Looking up users.

   - **Part Status**

     Default is ALL. Click to select one or more tracking statuses. See Lookup panel.

   - **Action Type**

     Default is ALL. Click to choose one or more action types. (Action Types are set in Lists > Parts.)

   - **Date Type**

     Leave as the default or click ▾ to choose a different date category:

     - **Action Date** – Date for following up with custodians of records.
     - **Part Due Date** – Set in each item's Edit Tracking window. See Moving work to the next step.
     - **Part Order Date** – Default. Date parts were ordered.
     - **Remind Date** – Date for reminding an MR9 user about action to take in regards to order parts.

- **Scheduled Date** – Date of records pickup or mailing.
- **Start Date** – Date you planned to start working on a case.
- **Waiver Date** – Date waiver periods end.

- **Date From/Date To**

  Works with **Date Type.** To set a date range, enter dates in the fields or click to select dates in the Date Navigator.

- **Order No.**

  Enter an order number to see only tracking items connected to a single order.

- **Processor**

  Click to search for tracking items that were assigned to a single case coordinator. See Looking up users.

- **Client Rep**

  Click to search for tracking items that were assigned to a single client representative. See Looking up users.

- **Runner**

  Click to search for tracking items that were assigned to a single field agent. See Looking up users.

- **Location Zip**

  To search for tracking items that are assigned to a location in a particular area, enter the area's zip code.

- **ROI Handled By**

  To search for tracking items by who handles the release of information (ROI) for this location if different from the location, click . See Looking up locations.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to orders tied to specific BUs. See Lookup panel.

3. Click . MR9 displays the results of your search. To customize the look of your results, see Grouping results and Customizing grids.

Reference

- Tracking Item
- Lists > Tracking
- Tracking Steps

- Lookup panel
- Date Navigator
- Processor
- Client Rep
- Business Units

Step-by-step instructions

- Generating a task list
- Finding parts
- Receiving records
- Customizing lists
- Defining tracking steps
- Looking up users
- Moving work to the next step
- Looking up locations
- Grouping results
- Customizing grids

Moving work to the next step

When the work is completed in the current step, you "push" the work order to the next step in the workflow. Keep the status of parts being tracked current by updating tracking information as the parts move through your company's workflow.

Continued from Updating parts, Updating multiple parts at once (skip to step 2), Searching tracking, or Generating a task list.

1. To move a part to a new tracking step in:
   - **Edit Part window** – Click in the **Tracking** header.
   - **Tracking results grid** – Check the box(es) of the part(s) you want to update, then click **Actions > Change Tracking Step.**

   NOTE: Save changes if changing tracking item too

   If you changed the **Tracking Item** category in the Edit Part window's **Tracking** pane before clicking , a popup will appear asking you if you want to save your changes. Click **Yes** to proceed.

2. In the **Change Tracking Step** panel or popup, the next step is automatically selected in ***Next Step.** Enter text or make selections:
   - ***Next Step**

     Required. Default is the next step in the workflow. You can select a different step in the dropdown to move forward or backward, skipping any steps, if desired. (Tracking steps, default number of days to complete each step, users to notify when steps are completed, and their sequence are set in Tracking Steps.)
   - **Assign to**

     Click to assign the selected work order(s) to a user. See Looking up users.
   - **Step Due Date**

     MR9 calculates the due date by adding the default number of days set in Tracking Steps to the date the step started, minus weekends and holidays. Change the date, if desired. See Date Navigator.
   - **Publish**

     Defaults for different steps are set in Tracking Steps. If set to Yes, the step will be visible to clients on MR Connect. Slide to No if you don't want clients to see the step. See Defining tracking steps.
   - **Remarks**

     Enter any special notes that staff needs to see about the tracking step.

3. Click **Save.**
4. In the part(s) being updated, MR9 updates the information in the **Tracking** pane and adds the step to the **Log** results grid. If updating from the Tracking results grid, the information in the related columns is updated. To edit an individual updated entry, click its **> Edit.**
5. To edit the current tracking step in any part, enter text or make selections in its **Tracking** pane in the Edit Part window:
   - **Tracking Item**

     Types of items/workflows that you monitor, such as records or process serving. If the default category is not accurate, click ▾ and select one in the dropdown. (Tracking Items and default are set in Lists > Tracking.)
   - **Tracking Step**

     Displays current trackable step in your workflow for the part and is uneditable.
   - **Priority**

     If the default category is not accurate, click ▾ and select one in the dropdown. (Priority levels and default are set in Lists > Tracking.)
   - **Assign To**

     Click to select the user responsible for the current tracking step. See Looking up users.
6. Click **Save >**
   - **Save & Edit:** To continue updating information. See Updating parts.
   - **Save & Close:** If you have no more information to add at this time. If you have set up Tracking Step Automation in System Preferences, the **Part Status** will update automatically depending on the current tracking step.

Reference

- Part
- Tracking Item
- Tracking Steps
- Lookup panel
- Date Navigator
- MR Connect
- Lists > Tracking
- Tracking Step Automation

Step-by-step instructions

- Updating parts
- Updating multiple parts at once
- Searching tracking
- Generating a task list
- Looking up users
- Defining tracking steps
- Entering general part information
- Entering additional part information
- Scheduling pickups
- Setting up part forms
- Entering services to be billed
- Entering & updating check request details
- Uploading files to a repository
- Making entries in notes logs

Sending forms individually

Usually you send multiple forms at once bundled into a single package. However you can send one form at a time to clients or custodians. You can also preview individual forms to check that the merge fields are working correctly.

Continued from Sending forms.

1. With parts selected in the Send Forms window's **Parts** pane, leave the default Single Form as the choice in the **Single Form/Form Package** dropdown in the **Form** panel.
2. Forms stored in the default main category appear in the **Form** pane. Select a different main category in the **Form Type** dropdown if desired. Forms listed update to those stored in the category selected.
3. Select a subcategory in the **Form Group** dropdown if desired. Forms listed update to those stored in the subcategory selected.
4. Click the radio button of the form you want to send.
5. Depending on the form type selected, one of the following recipient types appears in **Send To:**

   - **Locations** – Copies of the form will be sent to custodians at the locations selected in the **Parts** pane.
   - **Scheduling Party** – Form will be sent to the firm designated as the scheduling party in the **Parties** pane.
   - **Selected Parties** – Check the box of one or more parties in the **Parties** pane. Copies of the form will be sent to those parties.

   If desired, you can select a different recipient type from the default in the **Send To** dropdown.
6. You can also choose a different option from the default in **Printing Option.** (Options in the dropdown vary depending on which form type was selected in the **Form Type** dropdown.):

   - **all parts at once** – Consolidate all of the parts/locations to print as a list on one form.
   - **one part at a time** – Print each part on a separate form.
   - **all parties at once** – Consolidate all of the parties to print as a list on one form.
   - **one party at a time** – Print each party on a separate form.
   - **one part & party at a time** – Print each part and party on a separate form.

7. Click **Next.** If there is missing information in a selected part, an alert popup appears. You must fix the problem before you can send the form.
8. In the **Send Forms** popup that appears, check the box(es) of the forms you want to send.
9. Click **Send >**
    - **Download** – To save a copy of the form to your desktop.
    - **Email** – To send the form as an attachment to an email. See Composing emails.
    - **Preview** – To review the form before sending. In the form's preview screen you can:
        - **Edit the form.** See Editing forms & letters.
        - **Export/print the form.** See Editing form File options.
    - **Print** – To print out the form from your browser.
10. When finished, click **Cancel** in the **Send Forms** popup.

Reference

- Form Templates

Step-by-step instructions

- Sending forms
- Sending forms using packages
- Composing emails
- Editing forms & letters
- Editing form File options

Sending forms using packages

Packages are preset groups of forms that speed up the document printing process because you only have to choose the package, not each of the individual forms. A form package combines all of the forms into a single PDF file with a bookmark for each of the forms in the PDF.

Continued from Sending forms.

1. With parts selected in the Send Forms window's **Parts** pane, select Form Package in the **Form** panel's **Single Form/Form Package** dropdown.
2. Select the package you want to use in the **Form Package** dropdown.
3. The selected form package's forms appear in the **Forms** pane. The list is uneditable. Check that these are the forms you want to include. If you don't have a package that includes the forms you want to use, you can send forms individually (see Sending forms individually) or create a new package (see Creating form packages).
4. Slide **Print all parts at once** to Yes if [ ]
5. Slide **Print all parties at once** to Yes if [ ]
6. Depending on which type of recipient appears in **Send To** *(uneditable):*
   - **Locations** – Form package will be sent to custodians.
   - **Scheduling Party** – Check the box of the scheduling party in the **Parties** pane. Form package will be sent to that party.
   - **Selected Parties** – Check the box of one or more parties in the **Parties** pane. Copies of the form package will be sent to those parties.
7. Click **Next.** If there is missing information in a selected part, an alert popup appears. You must fix the problem before you can send the package.
8. In the **Send Forms** popup that appears, check the box(es) of the packages you want to send.
9. Click **Send >**
   - **Download** – To save a compressed file of the PDF package.
   - **Email** – To send the package as an attachment to an email. See Emailing from MR9.
   - **Print** – To print out the package.
10. When finished, click **Cancel** in the **Send Forms** popup.

Reference

- Form Packages

Step-by-step instructions

- Sending forms
- Sending forms individually
- Creating form packages
- Emailing from MR9

Searching records

Find records that you have received to view/update their details, upload files to their repository, email files to clients, or delete the records.

1. **Orders > Receive Records**
2. In the Receive Records window, **Received Date From/Service Date To** default to today. Click to see all the records entered today, or use the filters to narrow your search:

   - **Received Date From/Service Date To**
     Change if desired in the Date Navigator.
   - **Record Type**

     Categories for records. Default is ALL. Click to select one or more categories of records in the **Lookup Record Type** popup. See Lookup panel. (Record Types and default are set in Lists > Parts.)
   - **Order No.**

     Enter the entire order number.
   - **Part No.**

     Works with **Order No.** Enter the part number (no need to include leading zeroes) to search for records for a single part of the order.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . MR9 displays all the records that match your search criteria. Click an entry's **>**

   - **View** – To view information about the record in its View window.
   - **Edit** – To update the record's information and upload files to its repository. See Entering information about records received.
   - **Delete** – To delete the record. In the popup that appears, click **Yes.**

Reference

- Date Navigator
- Lookup panel

- Lists > Parts
- Order
- Part
- Business Units

Step-by-step instructions

- Adding records
- Updating parts
- Entering information about records received
- Uploading files to a repository

Searching Turn In

Find parts to turn in by order, what stage they are in, or other filters.

TIP: Turn in parts from part detail window

You do not have to search Turn In to begin part turn in if you are already in a View Part/Edit Part window. Click **More > Turn In** at the top of any part detail window to begin turning in that part. See Updating parts.

1. Set search criteria

1. **Production > Turn In**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:

   - **Order No.**

     Enter the entire order number.

   - **Part No.**

     Works with **Order No.** Enter the part number (no need to include leading zeroes) to search for a single part of the order.

   - **Part Order Date From/Part Order Date To**

     To search for turned-in parts by the date they were ordered, enter date(s) in the field(s) or click each field's to select date(s) in Date Navigator.

   - **Part Status**

     Stage the part is in, e.g., New or Cancelled. Default is ALL. Click to restrict the results. See Lookup panel. (Part Status options are set in Lists > Parts > Status.)

   - **Tracking Item**

     Default is ALL. Click to select a single type of tracking item. (Tracking Item types are set in Lists > Tracking > Item.)

   - **Tracking Step**

     Default is ALL. Click to restrict search to parts at specific step(s) in your process. See Lookup panel. (Tracking Steps are set in Setup > Tracking Steps.)

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to parts tied to specific BUs. See Lookup panel.

2. View results

1. Click . All parts that meet the search criteria appear in the results pane. Listings are color coded based on their part status and include the date and time of the last time their status was updated. (Part Status Colors are set in System Preferences > Orders > Part Status Color.)

2. Click a hyperlinked **Order.Part No.** to view details or begin turn-in.

   Or use shortcuts in the results grid: Click the order part number's >

   - **View** – To open the part in its View Turn In – [#] window.
   - **Edit** – To open the part in its Edit Turn In – [#] window.

   To begin turn-in, see Generating invoices or Adding records.

   ### TIP: Turn in multiple parts at the same time

   If you have more than one part in the results that you are turning in for the same client with the same services requested — for example when closing out the related case — you can turn them all in at the same time with **Bulk Turn In.** See Creating invoices for multiple parts at once.

Reference

- Date Navigator
- Lookup panel
- Lists > Parts > Status
- Lists > Tracking > Item
- Tracking Steps
- Business Units
- Part Status Color preferences

Step-by-step instructions

- Updating parts
- Generating invoices
- Adding records
- Creating invoices for multiple parts at once

Adding records

The first step in Turn In is to enter information about records obtained for the part — especially the page count — and upload the records to the repository.

TIP: Enter records in Orders

You can enter record information in the Orders module as records arrive instead of waiting to do it in Turn In. There are several ways to enter records in the Orders module: In the Receive Records function, in the Parts function, and in individual parts themselves. See Receiving records.

Continued from Generating invoices or Searching Turn In.

1. Enter record information

1. In Edit Turn In-Order# window, any records already entered for the part appear in the **Records** pane. To:
   - **Add information or upload files for a listed record,** click its hyperlinked **Received Date.**
   - **Enter a new record or other billable item such as process serving,** click .
2. The only required record information is the date you received the record. Other information can be entered/updated at any time until an invoice for the record has been posted. To enter information about the record, see Entering information about records received.

2. Save new entry

If this is a new entry, in the **New Record** panel click **Save >**

- **Save & Edit**

  To enter more information related to the record received. The window changes to Edit Record and adds a **Repository** pane.

  When finished editing and/or uploading files, click **Save.**

- **Save & Close**

  If you have no more information to add at this time.

- **Save & New**

  If there are additional records for this order, repeat these steps for each one.

3. ## Upload files to repository

   To upload records-related files, such as medical records, exhibits, and billing records, to the **Repository,** see Uploading files to a repository. Later, as related service items are produced, upload them here also.

4. ## Save the record

   In the **Edit Record** panel, click **Save.**

NEXT: Enter ordering parties

Enter information who requested services for this part. Alert contacts about uploaded files. See Adding ordering parties.

Reference

- Record
- Receive Records
- Parts
- Date Navigator

Step-by-step instructions

- Receiving records
- Generating invoices
- Searching Turn In
- Entering information about records received
- Uploading files to a repository
- Adding ordering parties

Entering information about records received

Enter details about a new record such as what type of record it is and how many pages it contains. You can update any information about a record until an invoice for it has been posted. Once an invoice has been posted, you can only add or update information in the record's **Remarks** field.

Continued from Receiving records, Adding records, Updating records, or Creating invoices for multiple parts at once.

In the **Record Info** pane of the **New Record/Edit Record** panel or the **Received Record** pane in Bulk Turn In:

- **Cancellation Billing**

  Default is No. If the record request was canceled and you charge a cancellation fee, slide to Yes.

- ***Received Date**

  Required. Default is today/date part was entered into MR9. To change it, use the Date Navigator.

- **No Record**

  Default is No. If Affidavit of No Records (ANR) is received, slide to Yes.

- **Record Type**

  Default is the record type specified originally for the part. Click ▾ to select the category the record belongs to if the default is not accurate. (Record Types and options are set in Lists > Parts.)

- **Pages**

  Total number of pages in the record to be billed. The number of pages obtained and billed can be different; enter only the pages to be billed. *(Usually entered in Turn In after Production department has paginated the records.)*

- **Begin Page No./End Page No.**

  Default is 1 and the total number of pages. Changing beginning page number automatically changes end page number.

- **Remarks**

  If the runner wrote any notes on the items retrieved, enter them here to keep a copy in MR9. Enter other information about the records that is not saved elsewhere. Remarks are displayed in the results grid in Records Received and the **Records** grid of the order in Turn In.

NEXT: Upload files to the record's repository

After entering information about records received, be sure to upload the records themselves to the record's repository. See Uploading files to a repository. If you have no files to upload, the next step in Turn In is to add ordering parties. See Adding ordering parties.

Reference

- Date Navigator
- Lists > Parts

Step-by-step instructions

- Receiving records
- Adding records
- Updating records
- Creating invoices for multiple parts at once
- Uploading files to a repository
- Adding ordering parties

Updating records

You can enter/edit information about a record at any time after creating their record(s) for an order.

Continued from Generating invoices or Viewing & updating repository file details.

1. Select record

1. Records are accesssible 2 ways:

   - **During Turn In**

     In View Turn In-Order# or Edit Turn In-Order# window, click the record's hyperlinked **Received Date.**

   - **In Repository**

     In the Record level repository, find the record you want to update (see Searching repositories) and click its hyperlinked **File Name.** Then in the View Repository window, click next to the **Record** field.

2. In the **View Record** panel, click **Edit.**

2. Enter/edit information

In the **Edit Record** panel, ***Received Date** is required but can be edited. To:

- **Update general information**
  About the record in the **Record Info** pane, see Entering general record information.
- **Add files**
  In the **Repository** pane, see Uploading files to a repository.
- **Delete files**
  In the **Repository** pane, check the box(es) of the file(s) you want to delete, then click . Click **Yes** in the popup that appears. The file is deleted. Click **OK** in the popup that appears when finished.
- **Download files**
  In the **Repository** pane, check the box(es) of the file(s) you want to you want to download, then click .
- **Alert contacts to uploaded files**

  (Before you can alert clients about uploaded files, you must create at least one invoice. See Adding ordering parties.)

To send emails to clients alerting them to files they can download from MR Connect, see Alerting clients.

NOTE: View/update additional info

If you accessed the record through the Record level repository, the **Order Info** pane appears in the **Edit Record** panel but is uneditable. Click next to:

- **Order No.** to view and edit the related order. See Updating orders.
- **Part No.** to view and edit the related part. See Updating parts.

3. ## Save update

   In the **Edit Record** panel, click **Save** (if in Turn In) or (if in Repository) **Save >**

   - **Save & New:** To save your changes, close the **Edit Record** panel, and start a new record.
   - **Save & Close:** To save your changes and close the Edit Record panel/screen.

Reference

- Record
- MR Connect

Step-by-step instructions

- Generating invoices
- Viewing & updating repository file details
- Searching repositories
- Entering general record information
- Uploading files to a repository
- Adding ordering parties
- Alerting clients
- Entering general contact information
- Updating orders
- Updating parts

Record

A **Record** can be a set of documents or a single document. The term covers many types of documents including legal documents — such as petitions, transcripts, motions, and judgments — and medical and related billing records. Each record is associated with a part of an order. You can enter an unlimited number of records for one order.

Reference

- Order
- Part

Step-by-step instructions

- Generating invoices
- Adding records
- Updating records

Adding ordering parties

After entering record information, the next step in Turn In is to add parties who ordered services. MR9 will automatically generate invoices for each party.

Continued from Generating invoices or Adding records. (You cannot add parties to a part without adding records first.)

1. Prefill first

Instead of entering parties and services manually, check first for previously entered choices. Prefilling saves time and reduces the chance of overlooking something by automatically adding related parties and/or service items. See Prefilling parties & services.

2. Add parties manually

If parties ordered services but were not included when you prefilled parties, add them one at a time. See Adding ordering parties manually.

3. Designate original client

After adding ordering parties, designate which one(s) ordered the original records:

1. In the **Invoices** pane of the Edit Turn In – [#] window, click **> Set Original.**
2. In the **Set Original** panel, check the box(es) of the original ordering client(s).
3. Click **Save.**

NEXT: Add services, restrict individual file access, & alert contacts

In the **Invoices** pane, each invoice created is listed with its record(s) and any prefilled services. To:

- **Update the service lists,** see Adding & updating services.
- **Turn off individual contacts' access** to specific Record-level repository files, see Restricting contacts' file access.
- **Alert contacts** that their files are available for download, see Alerting clients.

TIP: Hide invoice details onscreen

Especially with multiple invoices for the same part or lengthly service lists, it can be hard to see what invoices you have created. To shorten the display, you can hide invoice details onscreen. To hide an invoice's details, click ▾. The invoice listing collapses to just the top-line information, such as the invoice number, date, and amount, and responsible parties. Click ▸ to reveal details again. Click ▾/▸ in the **Invoices** pane header to collapse/expand all invoices at once.

Reference

- Parties
- Prefill

Step-by-step instructions

- Generating invoices
- Adding records
- Prefilling parties & services
- Adding ordering parties manually
- Restricting contacts’ file access
- Alerting clients
- Adding & updating services

Prefilling parties & services

Instead of manually entering parties and services they ordered into each invoice for an order, use MR9's prefill options to have MR9 create invoices that automatically include parties and their requested services for this order.

Continued from Adding ordering parties.

1. In the **Invoices** pane of the Edit Turn In – [#] window, click **> Prefill Orders & Services.**

2. In the **Prefill Orders & Services** panel, defaults include:

   - **Consolidate Invoices**

     MR9 will include all of a firm's orders on this part in the same invoice. If you want separate invoices for each order, resulting in multiple invoices for the same firm, slide to No.

   - **Create Service Items**

     MR9 will include the service items from the selected parties' requested services for the order (see Entering preferred or requested services) and any fee checks issued (see Entering & updating check request details) in the next step when creating orders. If you want to create blank invoices and add service items later, slide to No.

3. Parties that were flagged as ordering parties and replied to waivers asking for copies of records are listed and selected. (See Adding parties to orders.) Uncheck boxes of parties you don't want to invoice at this time.

   ### TIP: Missing billing rates?

   Parties to the part's order that are missing a billing rate table in the order are listed separately in the **Parties do not have Billing Rate** pane. If they are ordering services, click **Records Of's** in the Edit Turn In – [#] window to go back to the order and assign them to a billing rate table. See Entering party billing information.

   ### TIP: Missing an ordering party?

   If a party to an order does not appear in either list and you know they are in the order's list of parties, it means that they have not requested copies of the part's records — or their request was not entered into the order. If that's the case, update the party's waiver response to **Copy** in the order. See Recording waiver responses.

4. Click **Create Invoice(s).** MR9 assembles invoices for each of the selected parties listing the records and the party's preferred services. In addition, MR9 creates a service item, Custodian Fee, for the scheduling party by adding up the check amounts in the part. The markup, if any, is calculated and added to the Custodian Fee at the same

time. The Custodian Fee will appear on invoices with details on.

TIP: Color-coded invoices

You can easily locate invoices in the Edit Turn In – [#] window because the background of invoice listings is yellow, while listings for records and service items have white backgrounds. Also, text for invoices in progress is black, text for posted invoices is green, and text for voided invoices is red to quickly differentiate them from each other.

5. If any of the invoices created is incomplete or incorrect, you can update it:

   - **Services**
     To remove services not ordered, add other service items, and re-arrange the order of how service items will appear on the invoice, see Adding & updating services.
   - **Billing information**
     To include client and 3rd-party billing information, change invoice messages, upload repository files, and enter notes, see Adding billing information to invoices.
   - **Invoice headers**
     To apply your own custom text instead of the default header, see Selecting invoice headers.

NEXT: Add other parties

Additional parties: If there are ordering parties who did not appear in the **Prefill Orders & Services** panel, add them manually. See Adding ordering parties manually.

After adding parties, designate who ordered originals. See Adding ordering parties, step 3.

Reference

- Parties
- Prefill
- Consoldated Invoices and Statements

Step-by-step instructions

- Generating invoices
- Adding ordering parties
- Entering preferred or requested services
- Entering & updating check request details
- Adding parties to orders
- Entering party billing information
- Recording waiver responses
- Adding & updating services
- Adding ordering parties manually

Prefill

When you **prefill** an invoice, MR9 automatically adds related parties and/or service items, saving time and reducing the chance of incomplete invoices.

NOTE: Prefill options

Depending on what you are prefilling, parties and services can come from a party's standing requests, order parties, and recent related orders.

- Parties and their requested services can be entered in an order starting in the pre-trial discovery phase.
- They can be added to a part.
- Firms and contacts can have standing orders, which can be different if contacts at a firm have their own service requirements in addition to or in place of the firm's requirements.

Reference

- Order
- Part

Step-by-step instructions

- Generating invoices
- Prefilling parties & services

Sold To vs. Bill To

Sold To Firms and **Sold To Contacts** are parties that order an order and/or related services. **Bill To Firms** and **Bill To Contacts** are parties who will be responsible for paying invoices for the services ordered. **Sold To** and **Bill To** can be the same firm/contact on an order.

Step-by-step instructions

- Adding ordering parties manually
- Adding general billing information to invoices
- Restricting contacts' file access

Consolidated Invoices and Statements

A **consolidated invoice** will include all of a firm's orders for a part, instead of separate invoices for each firm contact.

A **consolidated statement** will include all of a firm's invoices, instead of separate statements for each firm contact.

Reference

- Part
- Firms
- Contacts

Step-by-step instructions

- Prefilling parties & services
- Entering additional firm information
- Sending monthly statements

Adding ordering parties manually

If parties ordered services but were not included when you prefilled parties, add them one at a time.

Continued from Adding ordering parties or Prefilling parties & services.

1. Add a party

1. Click in the **Invoices** pane header of the Edit Turn In – [#] window.
2. In the **Lookup Firm** panel, find the new party. See Looking up firms.

2. Enter required information

1. In the **New Invoice** panel, select the person placing the order in the ***Sold To Contact** dropdown *(required)*. If the contact is not listed, click and enter the contact's information in the **New Contact** panel. See Adding contacts to MR9.
2. In the ***Select record(s) this party is ordering pane** *(required)*, all records are selected by default. Uncheck the box of any record this party is not ordering.
3. In the **New Invoice** panel, click **Save.** Or add billing information before saving. See Adding general billing information to invoices.

3. Add services, etc.

The new invoice appears in the **Invoices** pane of the Edit Turn In – [#] window. You can continue entering information to the invoice here:

- **Services**
  To add service items and re-arrange the order of how service items will appear on the invoice, see Adding & updating services.
- **Billing Rate**

  If a Sold To contact has an assigned billing rate in their MR9 listing, it will be automatically applied to the invoice. (See Entering contact marketing information.) If the rate is missing or you want a different rate for this invoice:

  1. Click the hyperlinked **Received Date** for the related record the **Invoices** pane.
  2. In the **Edit Order** panel, click **Billing Rate's** or **> Lookup Billing Rate.** See Looking up billing rate tables.

TIP: Apply one billing rate to multiple invoices at once

If you have more than one invoices for the same part that you want to assign the same rate to, use **Set Billing Rates** to select invoices and apply one rate to them all at the same time. See Applying billing rates to one or more invoices.

- **Invoice Header**

  To apply your own custom text instead of the default header, see Selecting invoice headers.

NEXT: Designate ordering client(s) then customize orders

In the **Invoices** pane, each invoice created is listed with its record(s) and any prefilled services. To:

- Designate who ordered originals, see Adding ordering parties, step 3.
- Update the service lists, see Adding & updating services.

Reference

- Parties
- Sold To vs. Bill To
- Prefill

Step-by-step instructions

- Generating invoices
- Adding ordering parties
- Prefilling parties & services
- Adding general billing information to invoices
- Entering contact marketing information
- Looking up billing rate tables
- Applying billing rates to one or more invoices
- Adding & updating services

Restricting contacts' file access

Access Types "ALL" and "Contacts and Office" give file access through MR Connect to all contacts associated with an order/part, their seniors, and Sold To contacts for a record. If you don't want to give an included contact access to a specific file in the Record-level repository in Turn In, you can remove their access. For example if Record A has a medical record, billing records, and exhibits in the repository, you can designate that Contact 1 can access only the medical records and exhibits, while Contact 2 can access only the billing records.

Continued from Adding ordering parties or Adding billing information to invoices. (You cannot restrict access to Record-level repository files without generating invoices for parties first.)

1. Find file in Records repository

1. After uploading files to the Records repository in Turn In (see Adding records) and generating invoices for parties ordering records or other services, you can restrict which parties have access to a specific file associated with the record for the order being billed by clicking the file's hyperlinked **Received Date** in the **Records** pane of the Edit Turn In - [#] window.
2. In the **Edit Record** panel, go to the **Repository** pane. All files uploaded to the selected record are listed.
3. Click the hyperlinked file name of a file with Access Type ALL or Contacts and Office to restrict individual contacts' access to the selected file.

2. Set access for individual contacts on the file

1. In the **Edit Repository** panel, click **More > View Accessible Contacts.**
2. In the **View Accessible Contacts** panel, all Sold To parties for the record and contacts granted access from the sold to contact are listed. By default all listed contacts' **Allow** column is checked. To update accessiblilty, click **Edit.**
3. In the **Edit Accessible Contacts** panel, uncheck the **Allow** box for any contacts you do not want to have access to the selected file through MR Connect.
4. When finished, click **Save.**

3. Copy access levels to other files

1. If you want to set the same access levels to other files in the repository, click **Copy To** in the **View Accessible Contacts** panel.

2. In the **Copy To** panel, check the box(es) of the file(s) you want to give the same access levels to. Then click **Save.** In the popup that appears, click **OK.**

3. When finished, click **Close** in the **View Accessible Contacts** panel.

NOTE: Individual contact access restrictions work in Records-level repositories only

While you can view which contacts have access to a file in invoice repositories in Turn In, you cannot restrict individual contacts' access to these files.

Reference

- MR Connect
- Seniors
- Sold To vs. Bill To

Step-by-step instructions

- Adding ordering parties
- Adding billing information to invoices

Adding & updating services

After adding parties, add services they requested. MR9 will automatically generate invoices for each party.

When you prefill parties with standing orders, MR9 creates invoices that automatically include those service items. You can add other service items one at a time or in batches from different sources, such as billing sets. You can also copy services from one invoice to another, remove services not ordered for this part, and re-arrange the order of how they will appear on the invoice.

Continued from Generating invoices, Adding ordering parties, Prefilling parties & services, or Adding ordering parties manually.

In the **Invoices** pane of an Edit Turn In - [#] window, all invoices created so far are listed with their related record(s) and any service items to be billed. To:

- ## Add services
  - ### From billing sets/party's standing orders/part

    To include service requests from a billing set, the party's Firm and/or Contact listing, and/or the party's requested services for the part, click next to a record's hyperlinked **Received Date** in an invoice and select **Prefill Services.** See Adding multiple services at once.

  - ### Individually

    To add a single service to an invoice, click next to a record's hyperlinked **Received Date** in an invoice and select **New Service.** See Adding & updating individual service items.

- ## Edit included services
  - ### Remove multiple services at once

    If you prefilled parties, all of their related services were added to their invoice(s). You can easily remove any that were not ordered for this part.

    To remove multiple services, click next to a hyperlinked **Received Date** in an invoice and select **Delete Services.**

    In the **Delete Services** panel, check the box(es) of services you want to remove. Then click **Delete.** Click **Yes** in the popup that appears.

  - ### Remove services one at a time

    If you only need to remove one service from an invoice, deleting the single service is quicker.

    If any of the services on an invoice was not ordered by the **Sold To Contact** for this

part, click its hyperlink.

In the **Edit Service** panel, click **Delete.** Then click **Yes** in the popup that appears.

- **Update services**

  If a service item needs revising, click its hyperlink. See Adding & updating individual service items.

- **Copy party's services to another party**

  Save time if multiple parties to an order are ordering the same services by setting up one invoice with the services to be billed, then copying the service items to other parties. See Copying services to another party.

- **Arrange services**

  To change the order of how service items will appear on an invoice, click or next to a service item to move it up or down in the list. (Only charges that are in Service Group 9. Misc. Charge can be rearranged. See Service Groups.)

NEXT: Enter billing information

When you have orders for all parties, edit the invoice(s) created to include billing information, repository files, and notes. See Adding billing information to invoices.

Reference

- Parties
- MR Connect
- Billing Sets
- Prefill
- Service Groups

Step-by-step instructions

- Generating invoices
- Adding ordering parties
- Prefilling parties & services
- Adding ordering parties manually
- Adding multiple services at once
- Adding & updating individual service items
- Adding multiple services at once
- Copying services to another party
- Adding billing information to invoices

Adding & updating individual service items

When adding a new service to an invoice or updating one, you can edit default service information including delivery instructions for this invoice. You can also override billing rate charges for the item.

Continued from Adding & updating services, Adding multiple services at once, or Creating invoices for multiple parts at once.

1. Select service

1. Service Group

- **In the New Service panel: Service Group** defaults to 9. Misc. Charge. Most requested services will appear in subgroups here.
- **In the Edit Service panel:** Fields default to previously saved.

Change if needed. (Service listings and their groups are set in Setup > Service Item Subgroups and Setup > Service Item Master.)

2. Service Subgroup

Select the relevant service subset in the dropdown. Only those service items belonging to the selected subgroup appear in the **Service Item** dropdown below.

3. Service Item

Select the specific service ordered in the dropdown.

2. Select options

Not all fields are editable. Fields you can edit:

- **More detail on invoice**

  Enter additional explanation for this service item. Information in this field will print on the invoice next to the service item name.

- **Units**

  Update the number, if needed. Number of units must be greater than zero.

- **Split(%)**

  If several parties are sharing the cost of this service item, enter the percentage allocated for this party (e.g., "50.000" for one half or "33.333" for one third).

- **Override**

  Default is No. Slide **Override** to Yes if you want to enter billing rate information here. See Overriding billing rates.

- **Delivery Method**
  Select how service item should be sent to client in the dropdown. (Methods and default are set in Lists > Production.)

- **Turnaround Type**
  Select how how fast the client wants the service in the dropdown. (Turnaround speeds and default are set in Lists > Contacts.)

- **Due in days**
  If left blank, MR9 automatically calculates this field by adding **Due in days** default preferences to the **Order Date. Due in days** defaults come from the firm's preferences first (see Adding standing requests). If that is blank, it defaults to the business unit's preferences (see Entering BU preferences). Enter a number to override the defaults.

- **Produced**
  Slide to Yes when the service item is completed and ready to send to the client. A **Produced** checkmark will appear in the service item's listing in the **Invoices** pane, so you can quickly see which items still need to be completed for this order.

- **Remarks**
  Enter details and comments about this service item.

3. ## Save service item

- **In New Service panel,** click **Save >**
  - **Save & New:** To save the service item and add another.
  - **Save & Close**: When you have no more service items to add.
- **In Edit Service panel,** click **Save >**
  - **Save & Edit:** To save your changes and keep updating the service item.
  - **Save & Close**: When you have finished updating the service item.

MR9 adds/updates the service(s).

Reference

- Service Item Subgroups
- Service Item Master
- Lists > Production
- Lists > Contacts

Step-by-step instructions

- Adding & updating services
- Adding multiple services at once
- Creating invoices for multiple parts at once
- Overriding billing rates
- Adding standing requests
- Entering BU preferences

Overriding billing rates

When you need to bill using a different rate from a selected table's normal rates, use MR9's override feature. Only the current item is changed, and the rate table is unaffected. (To edit billing rates for future use, edit the defaults in the Service Item Master and/or specific billing rate tables in Billing Rates. See Entering/updating billing rates.)

Continued from Adding & updating individual service items

1. In the **New Service/Edit Service** panel in a Turn In detail window, slide **Override** to Yes.

2. The billing rate fields become active. Enter new amounts and update defaults:

   - **Billing Rate**

     Enter/update the amount you are charging per unit for this invoice.

     TIP: Include custodian fees without leaving Turn In

     If custodians charged you a fee for providing records and you pass those fees along to your clients, you can have MR9 add the fee for you on any invoice. In the **Billing Rate** field for a Custodian Fee, click ▽ **> Lookup Checks.** In the **Lookup Checks** panel, select the check(s) you are including in the service item, then click **Save.**

   - **Markup Type**

     If you are adding a markup on this service item, select whether it's by a percentage of the billed amount (%) or a fixed dollar amount ($) in the dropdown.

   - **Markup**

     Enter the percentage or dollar amount you will mark up the billable amount.

   - **Calculated Billing Rate**

     The **Billing Rate** per unit with the **Markup** included *(uneditable*).

   - **Billing Amount**

     The **Calculated Billing Rate** multipled by the number of **Units** of the service item *(uneditable*).

   - **Discount**

     If you negotiated a discount for this client and the service item is discountable, MR9 will calculate the amount here when you save the service item *(uneditable*).

   - **Total Billing Amount**

     The **Billing Amount** minus the **Discount** *(uneditable*).

- **Show text on invoice**

  Slide to Yes if you want to print the service item's name even if the invoice is printed with "no details." .

- **Show amount on invoice**

  Slide to Yes if you want to print the service item's amount even if the invoice is printed with "no details."

- **Account No.**
  Update by selecting a different revenue account in the dropdown. (Accounts are set up in Chart of Accounts.)

- **Court Taxable**
  Slide to Yes if the service item is a taxable court cost. (Generally, taxable court costs are awarded to the winning side in a lawsuit and are intended to defray the legal expenses of the successful litigant. Used in Texas only.)

- **Sales Taxable**
  Slide to Yes if the service item is sales taxable.

- **Sales Rep Commissionable**
  Slide to Yes if the sales representative should receive a commission for this service item.

Reference

- Service items
- Chart of Accounts
- Sales Rep

Step-by-step instructions

- Entering/updating billing rates
- Adding & updating individual service items

Adding multiple services at once

Save time adding services to invoices by using a billing set and/or preferred service lists to add a group of services at once.

Continued from Adding & updating services.

1. In the **Prefill Services** panel, check the **Service Subgroup** box in the header of a pane to select all of the services in that pane, then uncheck any services you don't want to include. Or check individual boxes of services you want to include:

   - **From Billing Set**

     The list displays the services in the default billing set and all of the services are checked by default. Select a different billing set in the dropdown if desired. (Billing Sets and their default are set in Setup > Billing Sets.)

   - **From Firm's Preferred Services**

     If the ordering firm has standing orders in their profile, they appear in this pane. (See Adding standing requests.)

   - **From Contact's Preferred Services**

     If the ordering contact has standing orders in their profile, they appear in this pane. (See Adding standing requests.)

   - **From Part's Preferred Services**

     If the ordering contact is a party to this part's order and requested services for the order, they appear in this pane. (See Entering preferred or requested services.)

2. Enter/update the number of **Units** for each selected service, if needed. Selected services must have a minimum of 1 unit each.

3. Click **Save.** MR9 adds the service(s) with default rates (set in Service Item Master) to the record selected.

4. If a service item needs revising, click its hyperlink. See Adding & updating individual service items.

Reference

- Parties
- Billing Sets
- Service Item Master

Step-by-step instructions

- Adding & updating services
- Adding standing requests
- Entering preferred or requested services
- Adding & updating individual service items

Copying services to another party

Save time if multiple parties to an order are ordering the same services by setting up one invoice with the services to be billed, then copying the service items to other parties. Once copied, you can edit or delete any of the services for a specific party.

Continued from Adding & updating services.

1. Click next to the hyperlinked **Received Date** of the record in the **Invoices** pane of an Edit Turn In - [#] window you want to copy from and select **Copy Services To.**
2. In the **Copy Services To** panel:
   - Selected record appears in the **Copy From** pane with its invoice identifiers.
   - The rest of the invoices tied to the same record are listed in the ***Copy To** pane. You must check at least one box in the list to copy services.
3. Click **Copy.**
4. All of the service items copy over to the selected invoice(s). To update an invoice's service items, see Adding & updating individual service items.

TIP: Suggested order for adding services to multiple parties

When you have multiple parties ordering copies of records, their invoices, except for the scheduling party, tend to be similar if not identical. In that case, add service items in the following order:

1. Add service items for the scheduling party who is paying for the original using **Prefill Services.**
2. Add service items for the first party who is paying for a copy using **Prefill Services.**
3. Replicate copy orders quickly for the rest of the parties using **Copy Services.**

Reference

- Parties

Step-by-step instructions

- Adding & updating services
- Adding & updating individual service items

Adding billing information to invoices

After adding services to invoices, populate them with billing information, such as who to bill for the services and the billing rate to use. Then choose invoice messages, upload repository files, and enter notes.

Continued from Generating invoices, Prefilling parties & services, Creating invoices for multiple parts at once, or Adding & updating services.

1. Select invoice

In the **Invoices** pane of an Edit Turn In - [#] window, click the hyperlinked **Invoice No.** you want to edit.

2. Update billing information

To enter/edit billing information in unposted invoices, see Adding general billing information to invoices.

3. Enter optional information

To enter additional information, including e-billing information, scroll or jump to the **Additional** pane. See Adding optional billing information to invoice.

4. Upload files

If you have any files related to this invoice, scroll or jump to the **Repository** pane, and upload the files. See Uploading files to a repository.

NOTE: Restrict individual contacts' access to a file

You can turn off specific contacts' access to specific files in the repository so they are unable to download and view those files from MR Connect. For example if Record A has a medical record, billing records, and exhibits in the repository, you can designate that Contact 1 can access only the medical records and exhibits in Record A, while Contact 2 can access only the billing records. See Restricting contacts' file access.

5. Make notes

If you want to make any notes about the invoice, scroll or jump to the **Notes Log** pane. See Making entries in notes logs.

NEXT: Select/customize invoice headers & messages

The next step in creating invoices is optional. MR9 automatically generates a standard invoice header for each invoice based on the service items selected, but if the default header is not appropriate or descriptive enough in this instance select one of your custom

invoice headers. See Selecting invoice headers.

You can also update the invoice message for one or more invoices for the same part at once. See Selecting invoice messages.

If you do not need to set invoice headers or messages, then your billing staff can finalize the invoices.

Reference

- Date Navigator
- Sold To vs. Bill To
- COD Invoices
- Lists > Invoice
- Electronic billing
- Notes Logs

Step-by-step instructions

- Generating invoices
- Creating invoices for multiple parts at once
- Prefilling parties & services
- Adding & updating services
- Adding general billing information to invoices
- Adding optional billing information to invoice
- Uploading files to a repository
- Making entries in notes logs
- Selecting invoice headers
- Selecting invoice messages
- Finalizing invoices

Adding optional billing information to invoices

Enter or update miscellaneous billing information, including electronic billing information to an invoice.

Continued from Adding billing information to invoices or Viewing & sending single invoices.

1. Update miscellaneous information

In the Edit Invoice window's **Additional** pane, enter/update text and selections:

- **Invoice Type**

  Select an invoice type (e.g., Interoffice Invoice or Vendor Invoice) in the dropdown. (Invoice Types and default are set in Lists > Invoice.)

- **Ref. No. for Bill To Contact**

  If the contact provided a reference number for the order/invoice include it here so the invoice relates to what they have in their own system.

- **Remarks**

  Enter notes about this invoice for internal use only.

2. Update e-billing information

If you will be billing the party electronically, this information — which includes Client ID, Client Matter No., Claim No., Name of Insured, Date of Loss, and Direct Billing Notes — should have been entered in the party at the order level so that it appears automatically in invoices related to the order. You can enter or update it here for this invoice only. See Entering electronic billing information.

Reference

- Lists > Invoice
- Electronic billing

Step-by-step instructions

- Generating invoices
- Adding billing information to invoices
- Viewing & sending single invoices
- Entering electronic billing information

Selecting invoice headers

After entering billing information, add custom invoice headers, if desired.

MR9 automatically generates a plain invoice header for each item using the patient's name — or witness if this is a subpoena — and record type. If the default header is not appropriate or descriptive enough for a particular item or items, enter or select one of your custom invoice headers. You can update one or more invoices for the same part at the same time.

Continued from Generating invoices, Prefilling parties & services, Adding ordering parties manually, or Adding billing information to invoices.

1. In the **Invoices** pane of an Edit Turn In – [#] window, click **> Set Invoice Headers.**
2. In the **Set Invoice Headers** panel's **Invoice Header** field, you can:
   - **Leave it blank.** The invoice will include the standard invoice header.
   - **Select an existing header.** Click ▾ to select a header from your previously set headers.
   - **Enter a custom header.** This header will not be saved in your Invoice Headers list. To save a header, see Setting up invoice headers.
3. In the ***Apply To** pane, the **Invoice Header** column displays the custom headers any invoices in the list already have applied. Check the boxes of invoices you want to receive the new header. You must select at least one invoice.
4. Click **Save >**
   - **Save & New –** To continue adding headers to invoices without leaving the **Set Invoice Headers** panel.
   - **Save & Close –** If you don't have more headers to add.

NEXT: Select invoice message, then apply rates

Choose or create a custom invoice message, if desired. See Selecting invoice messages.

When invoices for all parties to an order are filled with services and customized, apply billing rates individually or in batches. See Applying billing rates to one or more invoices.

Step-by-step instructions

- Adding billing information to invoices
- Generating invoices
- Prefilling parties & services
- Adding ordering parties manually
- Setting up invoice headers
- Selecting invoice messages
- Applying billing rates to one or more invoices

Selecting invoice messages

Specifying invoice messages for every single invoice can be a time-consuming and tedious chore when you have many parties ordering. Set up canned messages you can select from when generating invoices, including a default message that you plan to use most of the time. (See Setting up invoice messages.) Then use the Set Invoice Messages function when you want to apply a different message than the default. You can also choose to apply no message to an invoice.

Continued from Generating invoices or Selecting invoice headers.

1. In the **Invoices** pane of an Edit Turn In – [#] window, click **> Set Invoice Messages.**
2. In the **Set Invoice Messages** panel's **Invoice Message** field, either leave the field blank if you do not want to include a message, enter a message from scratch, or select a pre-set message by:
    1. Clicking to select a message from your list of invoice messages. See Lookup panel. Messages and the default are entered in Setup > Invoice Messages.
    2. In the **Lookup Invoice Message** panel, click the message you want.
    3. Edit the selected message, if desired. This does not change the message in your list of invoice messages.
    4. Customize the appearance of your message, if desired. See Customizing notes & messages.

    NOTE: Messages created here are one-off

    Messages updated or entered from scratch in the **Invoice Message** field will not be saved in your Invoice Message list. To save a new or updated message, see Setting up invoice messages.
3. In the ***Apply To** pane, default messages that apply to this order's invoice(s) are listed along with the clients they will be sent to. Check the boxes of invoices you want to switch to the message in the **Invoice Message** field. You must select at least one invoice.
4. Click **Save >**
    - **Save & New –** To continue adding messages to invoices without leaving the **Set Invoice Messages** panel.
    - **Save & Close –** When you have no more messages to add.

NEXT: Apply billing rates

When requested service items have been produced and invoices for all parties to an order are filled with services and customized, you can finalize invoices. The first step is to apply billing rates individually or in batches. See Applying billing rates to one or more invoices.

Reference

- Lookup panel
- Invoice Messages

Step-by-step instructions

- Setting up invoice messages
- Generating invoices
- Selecting invoice headers
- Customizing notes & messages
- Finalizing invoices
- Applying billing rates to one or more invoices

Updating orders in Turn In

Some errors in invoices, such as the wrong record is being billed or the wrong billing rate table is being used, can be corrected by editing the order in the unposted invoice so you don't have to leave Turn In.

Continued from Generating invoices.

1. Select order

In the **Invoices** pane of an Edit Turn In - [#] window, click the hyperlinked **Received Date** of the record whose order you want to edit.

2. Update order information

In the **Edit Order** panel, not all fields are editable. Fields you can edit in unposted invoices:

- ***Record**

  Required. If the wrong record is being billed with the invoice, click the dropdown and select the correct record.

- **Billing Rate**

  To change the billng rate for this invoice, click ... **> Lookup Billing Rate.** See Looking up billing rate tables.

- **Invoice Header**

  MR9 generates a default header for the invoice unless you select a custom header in the dropdown. Invoice headers are created and saved in **Setup > Invoice Headers.** See Setting up invoice headers.

- **Remarks**

  Information about the order/record not entered elsewhere.

3. Review order entities

You cannot change the **Sold To** or **Bill To** clients here but you can view and update their details by clicking next to their fields. See Updating firms and Updating contacts.

NOTE: You cannot update orders in posted invoices

If the invoice for the record has already been posted, you cannot update the order information but you can review the details here.

Reference

- Sold To vs. Bill To
- COD Invoices
- Lists > Invoice
- Electronic billing
- Notes Logs

Step-by-step instructions

- Generating invoices
- Looking up billing rate tables
- Setting up invoice headers
- Updating firms
- Updating contacts
- Finalizing invoices

Creating invoices for multiple parts at once

You can add a service item to multiple parts for the same contact simultaneously. For example, you can charge cancellation fees, basic fees, or authorization fees for all related parts at once when a specific case settles.

1. Find parts

1. You can find and select parts to turn in from several results grids:

   - **Turn In**

     Use the search criteria in **Production > Turn In** to find the parts you want to turn in. See Searching Turn In.

   - **Parts**

     In **Orders > Parts,** enter the order number associated with the parts you want to turn in and click .

   - **Orders**

     Use the search criteria in **Orders > Orders** to find the order for the parts you want to turn in. See Searching Orders. Then click the order's **> Parts.**

2. In the results grid, check the boxes of all the parts you want to generate invoices for, then click **Actions > Bulk Turn In.**

3. In the Bulk Turn In window, all of the parts you selected in the results grid apppear in the **Parts to create invoices** pane. If you want to update a part, click its hyperlinked **Order.Part No.** (See Updating parts.)

2. Enter record information

Enter the total number of pages, and beginning page number, if relevant, in the **Received Record** pane. See Entering information about records received.

3. Update invoice information

In the **Invoice** pane, review and revise billing information, if needed. See Adding general billing information to invoices.

4. Add services

In the ***Services** pane, click , then select a service you are adding to all of the parts in the **New Service** panel. See Adding & updating individual service items.

To edit an added service item, click its hyperlinked name. See Adding & updating individual service items.

To delete a service item from the list, check its box and click . Click **Yes** in the popup that appears.

5. ## Generate invoices

    1. After you have entered all service items, click **Create Invoices.** MR9 creates the invoices and calculates the charges. In the popup that appears, click **OK.**
    2. MR9 opens the Post Invoices window with all of the invoices listed. To:
        - **Preview invoices before posting,** see Previewing invoices.
        - **View/edit an invoice,** click its hyperlinked **Invoice No.** See Adding billing information to invoices.
        - **Post, send, and archive invoices,** see Batch-posting invoices.

Reference

- Part
- Results pane

Step-by-step instructions

- Generating invoices
- Searching Turn In
- Searching Orders
- Updating parts
- Entering information about records received
- Adding general billing information to invoices
- Adding & updating individual service items
- Previewing invoices
- Adding billing information to invoices
- Batch-posting invoices

Finalizing invoices

After producing the requested service items and generating invoices, the second part of Turn In involves applying billing rates to invoices, then calculating and posting the invoices. If you have separate billing and production departments, billing usually handles the tasks involved in finalizing invoices.

1. Apply rates

If not already in the invoice, search for the relevant order/part in Turn In. See Searching Turn In.

Before MR9 can calculate the amounts to charge on an invoice, it must have an assigned billing rates table. Check that the invoice has a billing rate table. If **Billing Rate Name** (appears in the invoice in the order section) is blank or the billing rate table listed is incorrect, see Applying billing rates to one or more invoices.

NOTE: Finalize invoices in Turn In or Billing

After applying rates to invoices, the next steps in finalizing invoices can occur within individual orders in Turn In or batches in Billing > Post Invoices, usually at the end of the day.

2. Calculate invoice totals

Direct MR9 to total service charges on invoices. See Getting invoices ready to print.

3. Preview invoices

After calculating invoice totals, review the invoices to check that they are correct and include all relevant charges. See Previewing invoices.

4. Post invoices

After previewing the invoices, post them to your MR9 ledger. If posting:

- **In Turn In** — See Posting invoices in Turn In.
- **In Post Invoices** – See Batch-posting invoices.

NEXT: Send invoices to clients

After posting, MR9 will automatically prompt you to send copies to ordering clients. See Sending, re-sending, & archiving invoices.

Reference

- Billing rates
- Billing > Post Invoices

Step-by-step instructions

- Generating invoices
- Searching Turn In
- Applying billing rates to one or more invoices
- Getting invoices ready to print
- Previewing invoices
- Posting invoices in Turn In
- Batch-posting invoices
- Sending, re-sending, & archiving invoices

Applying billing rates to one or more invoices

Before MR9 can calculate the amounts to charge on an invoice, it must be assigned to a billing rate table. There are multiple places in MR9 where you can assign billing rates individually — in a contact's listing, in an ordering party's entry, and when creating an invoice.

AndF if more than one invoice for the same part should use the same rates, you can select the invoices in Turn In and apply one billing rate table to them all at the same time. You can override charges for individual service items if the billing rate is incorrect for that item. If you have a separate billing department, they will handle applying rates and finish the invoice(s).

Continued from Selecting invoice messages or Finalizing invoices.

1. Find & apply rates

TIP: Enter billing rates in the order

If you enter billing rates for parties to an order in the order itself, you can skip this step. See Entering party billing information. This will save time when you have multiple parts to the same order.

You can also add or change billing rates when creating invoices. See Adding ordering parties manually.

1. In the **Invoices** pane of the Edit Turn In – [#] window, click **> Set Billing Rates.**
2. In the **Set Billing Rates** panel, click ***Billing Rate** *(required)*.
3. In the **Lookup Billing Rate** panel, find and select a billing rate table. See Looking up billing rate tables.
4. In the **Set Billing Rates** panel's ***Apply To** pane, all invoices for this **Order.Part No.** appear with any already applied billing rate tables in their listings. Check:
   - The box(es) of the invoice(s) you want to apply the new billing rates to.
   - The box of the first invoice in a contiguous list in the pane, then Shift + Click the last invoice of the group to select those invoices together.
   - The box in the header to select all of the invoices.

   You must select at least one invoice.
5. Click **Save >**
   - **Save & New –** To continue applying billing rates without closing the panel.

- **Save & Close –** To close the panel when you have finished applying billing rates.

6. Repeat until all invoices in the **Invoices** pane have billing rates applied.

2. Review & update charges

Before calculating invoices, check that each service item has the proper rates applied. Override individual charges if needed.

1. If any charges need adjusting, click the hyperlinked **Service Item** listed under its invoice in the **Invoices** pane.
2. In the **Edit Service Item** panel, slide **Override** to Yes.
3. Update rates and options as needed. See Adding & updating individual service items.
4. Click **Save > Save & Close** when finished updating.

NEXT: Calculate & post invoices

After applying rates to invoices, calculate invoice totals. You can then preview the invoices, post them to your MR9 ledger, and send copies to ordering clients. See Getting invoices ready to print.

Reference

- Billing Rates
- Lists > Accounting
- Lookup panel

Step-by-step instructions

- Finalizing invoices
- Selecting invoice messages
- Entering contact marketing information
- Entering party billing information
- Adding billing information to invoices
- Adding ordering parties manually
- Looking up billing rate tables
- Adding & updating individual service items
- Getting invoices ready to print

Looking up billing rate tables

Find and apply billing rate tables to clients, order parties, and invoices.

Continued from Applying billing rates to one or more invoices, Adding general billing information to invoices, Entering party billing information, or Adding parties to orders.

1. In the **Lookup Billing Rate** panel, all of your active billing rates appear in the **Results** pane. (Billing rates are entered in Setup > Billing Rates.)

   Or if you clicked a **Billing Rate** field's ▽... **> Lookup Billing Rate,** only rates associated with the same Billing Rate Group as the billing rate table in the **Billing Rate** field are listed.

   Click any hyperlinked **Billing Rate Name** in the **Results** pane to select that rate table.

2. If you don't see the billing rate table you want in the list, select options or enter text in the search criteria to find the table:

   - With Billing Rate Group selected in **Search By,** click in **Search Criteria** and select a rate group in the dropdown. (Billing Rate Groups are set in Lists > Accounting.) You can select more than one rate group — every group you select will appear in the **Search Criteria** field.
   - If you don't want to use a Billing Rate Group in your search that appears in the **Search Criteria** field, click its ⊗ to delete it.
   - Choose Billing Rate Name in the **Search By** dropdown, then enter part of a billing rate table's name in **Search Criteria**.
   - Slide **Show Active Only** to No to see all billing rate tables.

3. Click . MR9 lists all of the billing rate tables that meet your search criteria.

4. Click a hyperlinked **Billing Rate Name** to select that rate table.

Reference

- Billing Rates
- Lists > Accounting
- Lookup panel

Step-by-step instructions

- Finalizing invoices
- Entering/updating billing rates
- Applying billing rates to one or more invoices
- Adding general billing information to invoices
- Entering party billing information
- Adding parties to orders

Getting invoices ready to print

After applying rates to invoices, calculate invoice totals. You can then review the invoices for errors, post them to your MR9 ledger (i.e., record the billed items), and send copies to ordering clients.

NOTE: Finalize invoices as you go or in batches

The final steps of calculating, previewing, posting, and sending invoices can be done either within each turned-in order or in the Billing module later, individually or in batches to save time.

- **Within Turn In:**

  Continued from Applying billing rates or Finalizing invoices.

  1. To calculate charges on invoices, click **Calculate Invoices** in the Edit Turn In – [#] header.
  2. In the **Calculate Invoices** panel, all unposted invoices are listed and selected. If you don't want to calculate an invoice now, uncheck its box.
  3. Click **Calculate.**
  4. MR9 calculates each invoice. If any invoice cannot be calculated, a popup appears with the explanation and the invoice remains in grid in the **Calculate Invoices** panel. Click **Cancel** in the panel, then resolve the issue and repeat from step 1. If the issue is:
     - **Missing Bill To clients** — Click the client's hyperlinked **Invoice No.** in the **Invoices** panel and enter the **Bill To Firm** and **Bill To Contact** *(both are required)* in the **General** pane of the **Edit Invoice** panel. See Adding general billing information to invoices.
     - **Missing billing rate** – Click the hyperlinked **Received Date** in the invoice, then click next to the **Billing Rate** field. See Looking up billing rate tables.
  5. When all invoices are calculated successfully, a popup appears alerting you. Click **OK.**

- **In Billing > Post Invoices results:**

  Continued from Searching unposted invoices.

  In Post Invoices search results, any invoice listed in the results grid that needs to have its charges calculated and totaled appears with a checkmark in the **Need Calculation** column.

  1. Click the invoice's **> Calculate Invoice.** MR9 calculates the invoice amount and enters today's date as the **Invoice Date.**

2. If MR9 cannot calculate the invoice because it is missing a billing rate, a popup appears. Click **OK.**
3. Go back to Turn In and search for the invoice's related **Order.Part No.** See Searching Turn In. Click its **> Edit.**
4. In the Edit Turn In – [#] window, click the hyperlinked **Received Date** in the invoice that is missing a **Billing Rate Name.**
5. In the **Edit Order** panel, click next to the **Billing Rate** field and select a billing rate table. See Looking up billing rate tables.
6. In the **Edit Order** panel, click **Save > Save & Close.** Then continue to calculate the invoice following the instructions above for Within Turn In.

NEXT: Preview, then post invoices

After calculating invoice total amounts, review invoices for errors, then post them to your MR9 ledger from within Turn In or in Post Invoices.

If after reviewing an unposted invoice you modify it, then you must recalculate the invoice before you can post it.

Reference

- Send Invoices

Step-by-step instructions

- Finalizing invoices
- Applying billing rates
- Adding general billing information to invoices
- Looking up billing rate tables
- Searching unposted invoices
- Previewing invoices
- Batch-posting invoices
- Sending, re-sending, & archiving invoices

Previewing invoices

After calculating invoice totals, review what will be on the invoice before posting, archiving, and sending it to the client.

NOTE: Finalize invoices as you go or in batches

The final steps of calculating, previewing, posting, and sending invoices can be done either within each turned-in order as you go or in the Billing module, individually or in batches to save time.

Continued from Getting invoices ready to print, Finalizing invoices, Creating invoices for multiple parts at once, Searching unposted invoices, or Sending & archiving invoices in batches.

1. Click an **Invoice No.** **> Preview Invoice** in:

   - **Turn In**

     The **Invoices** pane of the Edit Turn In – [#] window.

   - **Billing**

     - The results pane of the Post Invoices window.
     - The results pane of the Send Invoices window.

   ### TIP: More places to preview invoices

   In Billing > COD Invoices: Click **Preview Invoice** in the View Invoice/Edit Invoice window of an invoice selected in the results pane of the COD Invoices window. See Working with COD invoices.

   In Inquiry > Invoice Inquiry: In the View Invoice window of an invoice selected in the results pane of the Invoice Inquiry window, click **Send > Print Original Invoice/Current Invoice.**

2. In the Preview Invoice/Print Invoice window, MR9 displays invoices with/without details, depending on the preference set in the billed firm's **Additional** pane (see Entering additional firm information). Unposted invoices are displayed with "DRAFT" as a watermark to prevent them from being sent out accidentally to clients. To:

   - **View/hide line item charges**

     Click **Turn detail on** or **Turn detail off.**

   - **Edit an unposted invoice**

     Click **Close.** Then open the related part in Turn In and edit the invoice. You will have to recalculate the invoice after updating it. See Generating invoices.

- **Export the invoice**

  To save the invoice and/or edit it in another application, or print it, see Printing invoices, statements, & reports.

- **Send a posted invoice to the client**

  Click **Send** *(in Send Invoices and COD Invoices' previews only).* See Emailing from MR9.

3. When finished, click **Close.**

Next: Post and send invoices

After previewing invoices, post them to your MR9 ledger (i.e., record the billed items) and send copies to ordering clients. See Batch-posting invoices and Posting invoices in Turn In.

Reference

- Post Invoices
- Send Invoices
- COD Invoices
- Invoice Inquiry

Step-by-step instructions

- Getting invoices ready to print
- Finalizing invoices
- Creating invoices for multiple parts at once
- Searching unposted invoices
- Sending & archiving invoices in batches
- Working with COD invoices
- Entering additional firm information
- Generating invoices
- Printing invoices, statements, & reports
- Emailing from MR9
- Batch-posting invoices
- Posting invoices in Turn In
- Sending, re-sending, & archiving invoices

Posting invoices in Turn In

After previewing an invoice, post it to your MR9 ledger (i.e., record the billed items) and send copies to ordering clients. Once posted, an invoice cannot be deleted.

Continued from Previewing invoices or Finalizing invoices.

1. When an invoice is ready to be posted and sent to the client, click **Post Invoices** in the Edit Turn In – [#] header.

   ### TIP: What to do if Post Invoices is grayed out

   If the **Post Invoices button** is grayed out, one or more of the invoices either:

   - **Needs to be calculated.** See Getting invoices ready to print.
   - **Has zero billable charges.** Review the listed service items and billing rate applied for errors. If needed, override the billing rate for the service items. See Overriding billing rates.
   - **Is COD.** Because COD invoices in MR9 are not counted as sales, they cannot be posted or archived to the repository. Use the COD Invoices function instead to preview and send COD invoices. See Working with COD invoices.

2. In the **Post Invoices** panel, all unposted invoices for the part are listed and selected. If you don't want to post an invoice now, uncheck its box.

3. Click:

   - **Post** – To only post the invoices.
   - **Post & Archive** – To post and save the invoices to MR9's repository at the same time.

4. After posting successfully, posted invoices' text changes to green and a popup appears. Click:

   - **Yes** – To send the invoice(s) to the ordering client(s) (and/or archive them if you selected **Post** above). This opens the Send Invoices window with these invoices listed and selected in the results pane. See Sending, re-sending, & archiving invoices.
   - **No** – If you have a lot of orders to post and send invoices for, you can batch-send them later using Send Invoices.

NOTE: Finalize invoices as you go or in batches

Instead of posting invoices as you go in Turn In, you can batch-post and send a group of invoices at once. To batch-post invoices, see Batch-posting invoices.

NEXT: Manage invoices

Use the Billing module to post and send invoices in batches, send e-bills to clients, transfer invoices between clients, and manage COD invoices.

Reference

- Post Invoices
- COD Invoices
- Send Invoices
- Billing module

Step-by-step instructions

- Previewing invoices
- Finalizing invoices
- Getting invoices ready to print
- Overriding billing rates
- Working with COD invoices
- Sending, re-sending, & archiving invoices
- Batch-posting invoices

DYMO

DYMO (dymo.com) is a popular line of label printers that is compatible with MR9.

Reference

- Label Templates

Step-by-step instructions

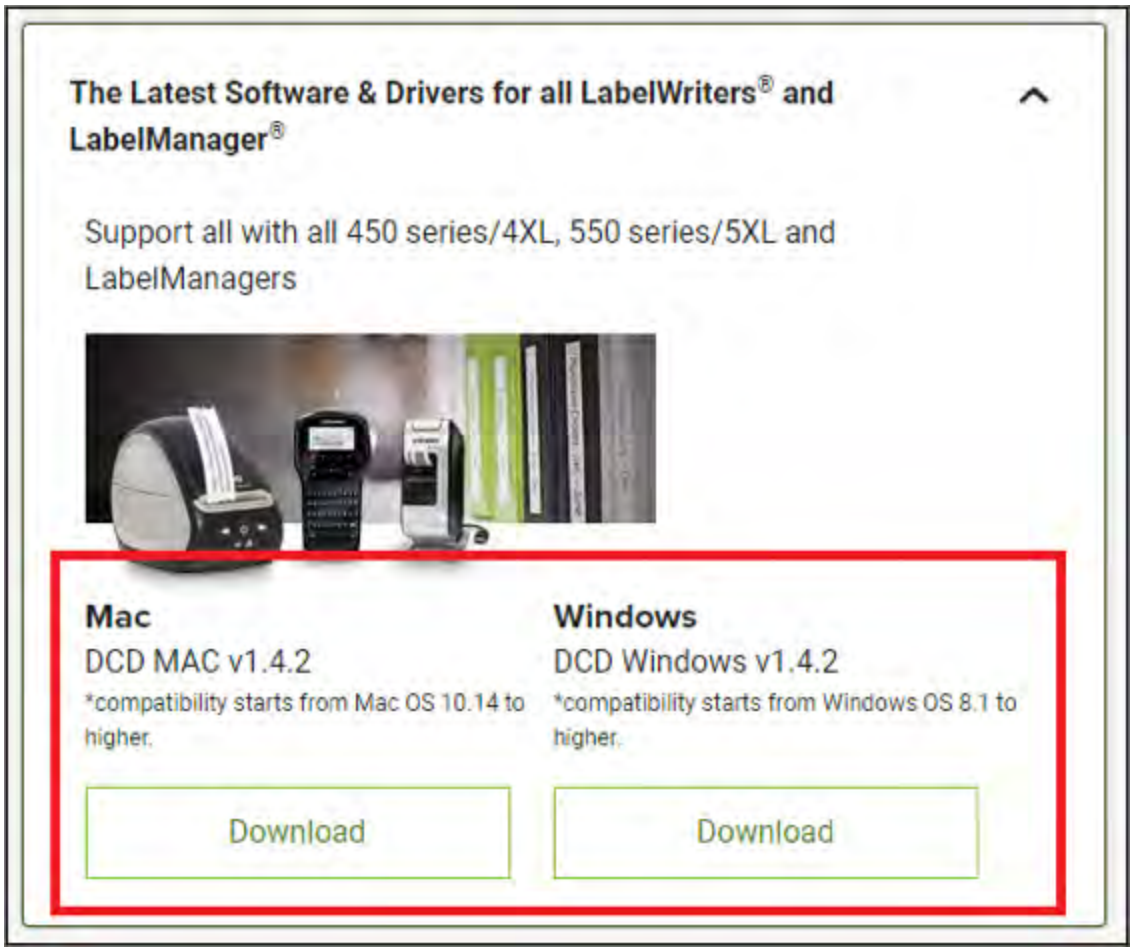
- Setting up for online label printing
- Creating DYMO label templates
- Managing label templates
- Printing envelopes and labels

Setting up for online label printing

Before you can print labels in MR9, you must have a DYMO printer that is ready to print labels in a web environment.

1. On the DYMO website's Downloads: Software, Drivers & User Guides page (https://www.dymo.com/support?cfid=user-guide), click **The Latest Software & Drivers for all LabelWriters.**

2. Download the software for your operating system.



3. To install the program:

   - On Windows, see Setting up DYMO in Windows OS.
   - On Macs, see Setting up DYMO in Mac OS.

NOTE: Set up custom label templates for company-wide use

Create DYMO labels customized to your company's needs, then store them in MR9 for everyone on your staff to use. To create DYMO label templates, see Creating DYMO label templates. To add your label templates to MR9, see Managing label templates.

Reference

- DYMO
- Label Templates

Step-by-step instructions

- Setting up DYMO in Windows OS
- Setting up DYMO in Mac OS
- Creating DYMO label templates
- Managing label templates

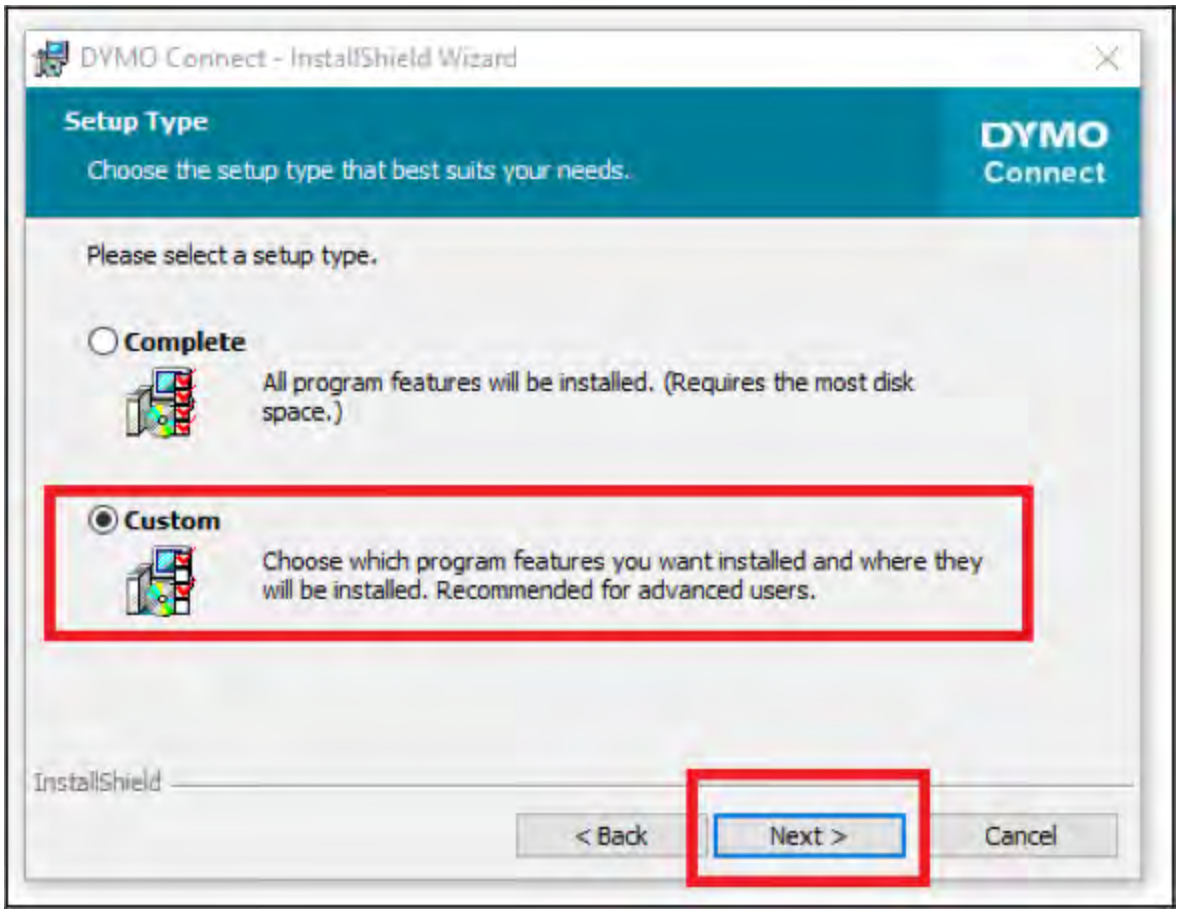
Setting up DYMO in Windows OS

If your computer has a Windows operating system, after downloading DYMO software you must install it and configure your system to use a DYMO printer before printing labels from MR9.

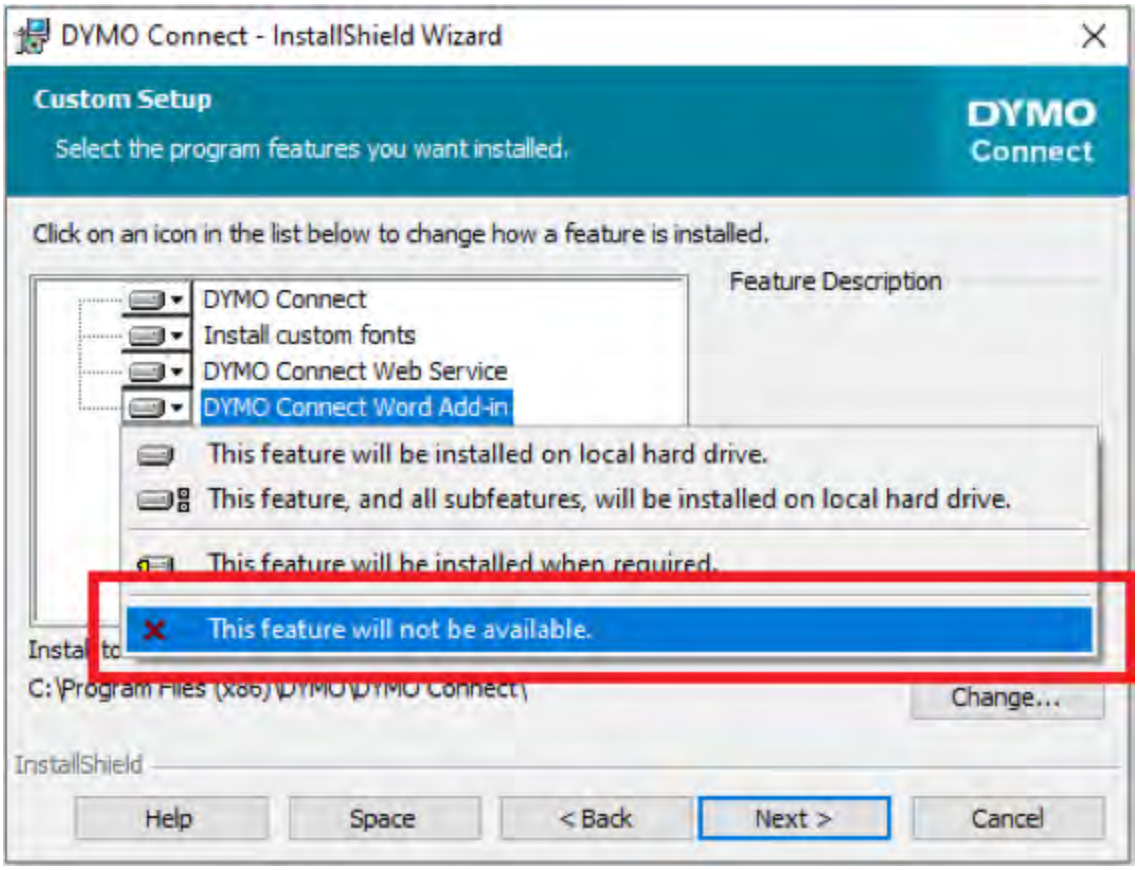
Continued from Setting up for online label printing.

1. After downloading the Windows version, execute the setup file.

2. In the DYMO Connect – InstallShield Wizard screen's dropdown, select the appropriate language for the installation of DYMO Connect, then click **OK.**
3. In the DYMO Connect installation screen, click **Next.**
4. In the License Agreement screen, click **I accept the terms in the license agreement,** then click **Next.**
5. Leave the default Destination Folder as is, and click **Next.**
6. In the Setup Type screen, click **Custom,** then click **Next.**



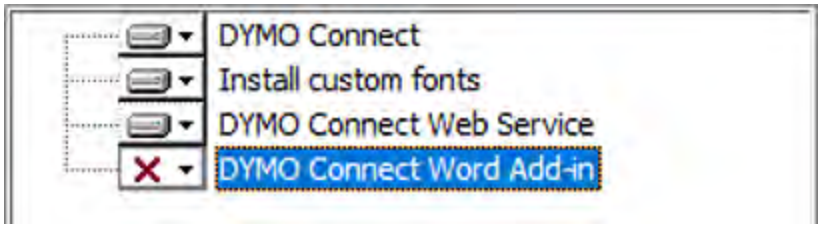
7. In Custom Setup, select **DYMO Connect Word Add-in,** then click **This feature will not be available.**



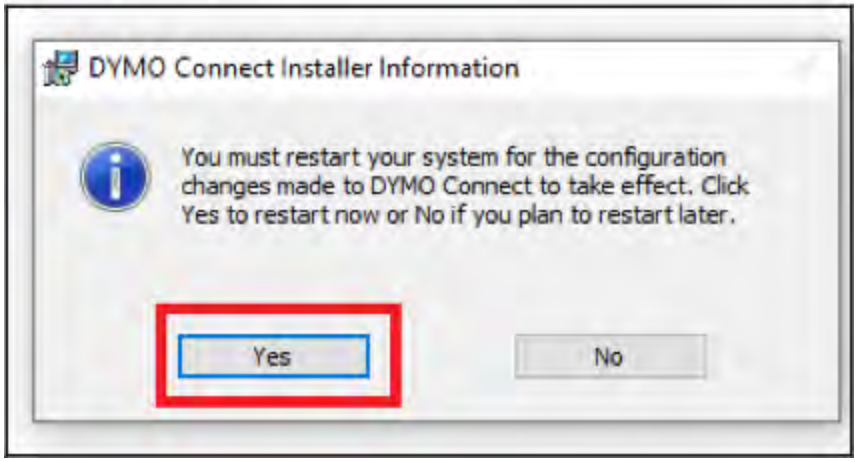
NOTE: Skip this step if you want to use DYMO with Word

If you plan to use your DYMO label printer with Microsoft Word, you can skip this step. Instead choose **Complete** in Setup Type (step 6).

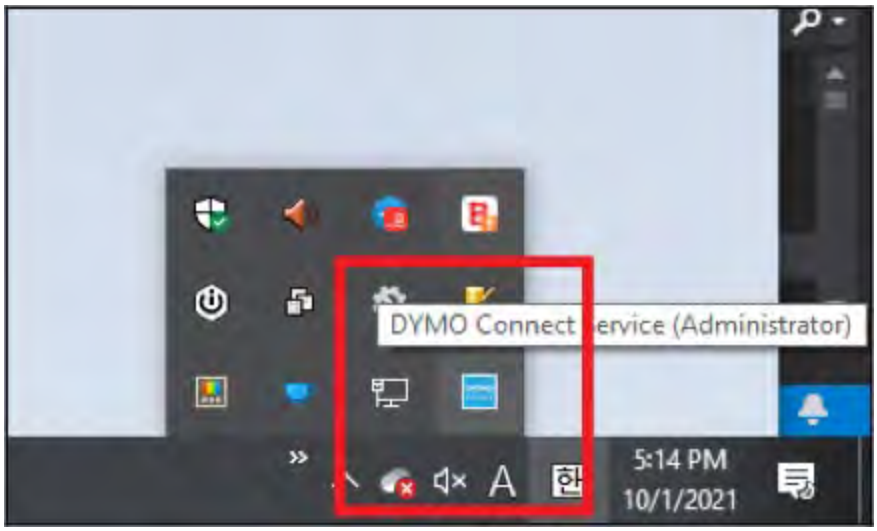
8. When **DYMO Connect Word Add-in** is disabled, click **Next.**



9. In the Ready to Install the Program screen, click **Install.**
10. If the Files in Use screen appears, select **Do not close applications. (A reboot will be required.),** then click **OK.**
11. In the InstallShield Wizard Completed screen, uncheck both **Launch DYMO Connect** and **Improve DYMO products,** then click **Finish.**
12. When the "You must restart your system..." popup appears, click **Yes** to restart your system.



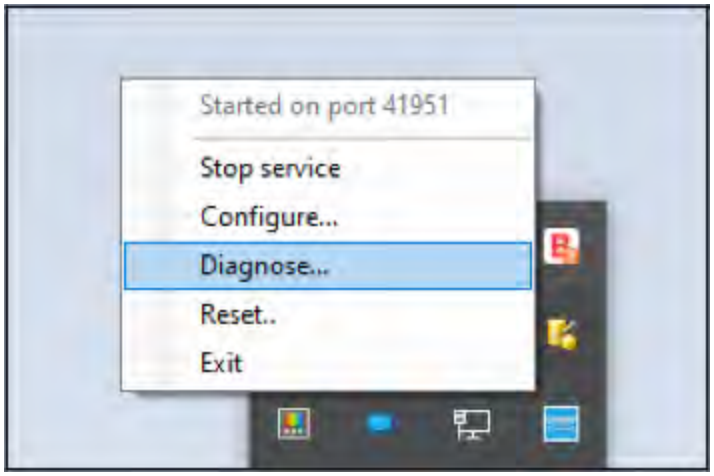
13. Confirm whether the Dymo Connect Web service icon exists in the notification area from the Windows taskbar.



If the icon is missing:

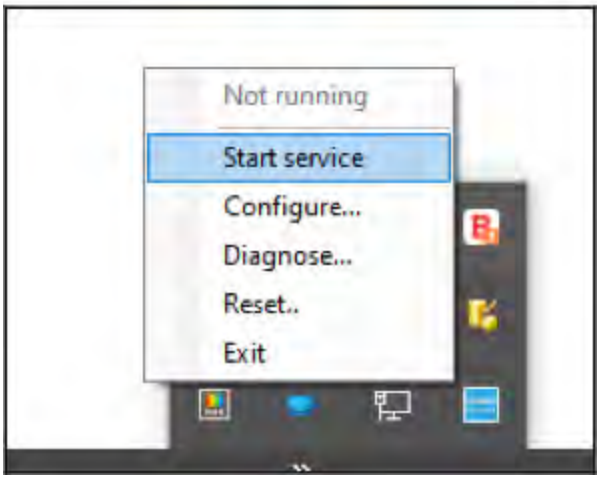
1. Check if the file exists in the following path:
   C:\Program Files (x86)\DYMO\DYMO Connect\
2. Select the "DYMO.Webapi.Win.Host.exe" file, and double click to execute.

14. Right-click on the Dymo Connect icon from the notification area of the Windows taskbar. When the menu appears, click **Diagnose.**

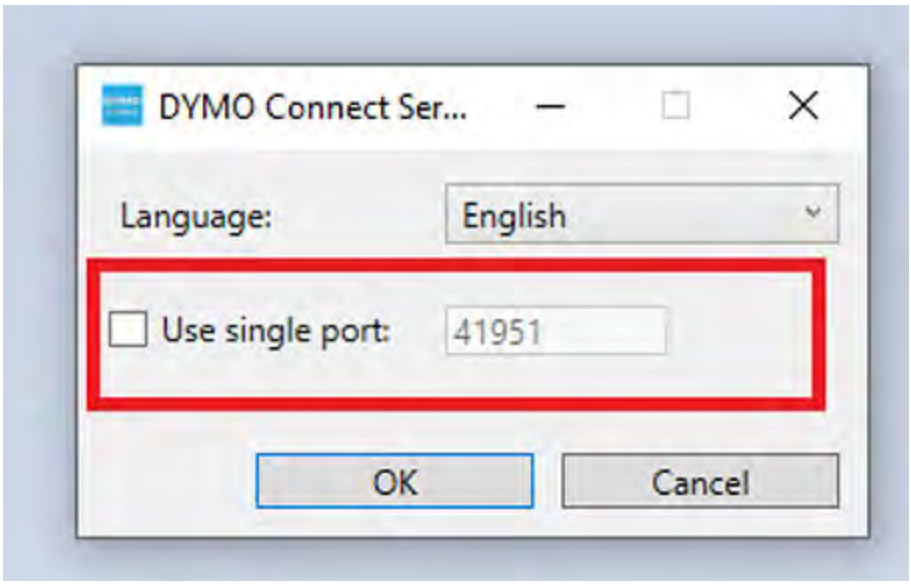


15. If the DYMO Connect Service is properly implemented, the popup message will display the port information. Click **OK.**
    If a different message appears, click **OK,** then check the following:

    1. If the DYMO Connect Service is not running, click **Start service.**



2. For all other error messages, click **Configure.** Confirm **Use single port** is unchecked, and the port information is 41951.



Reference

- DYMO
- Label Templates

Step-by-step instructions

- Setting up for online label printing
- Printing envelopes and labels
- Creating DYMO label templates
- Managing label templates

Setting up DYMO in Mac OS

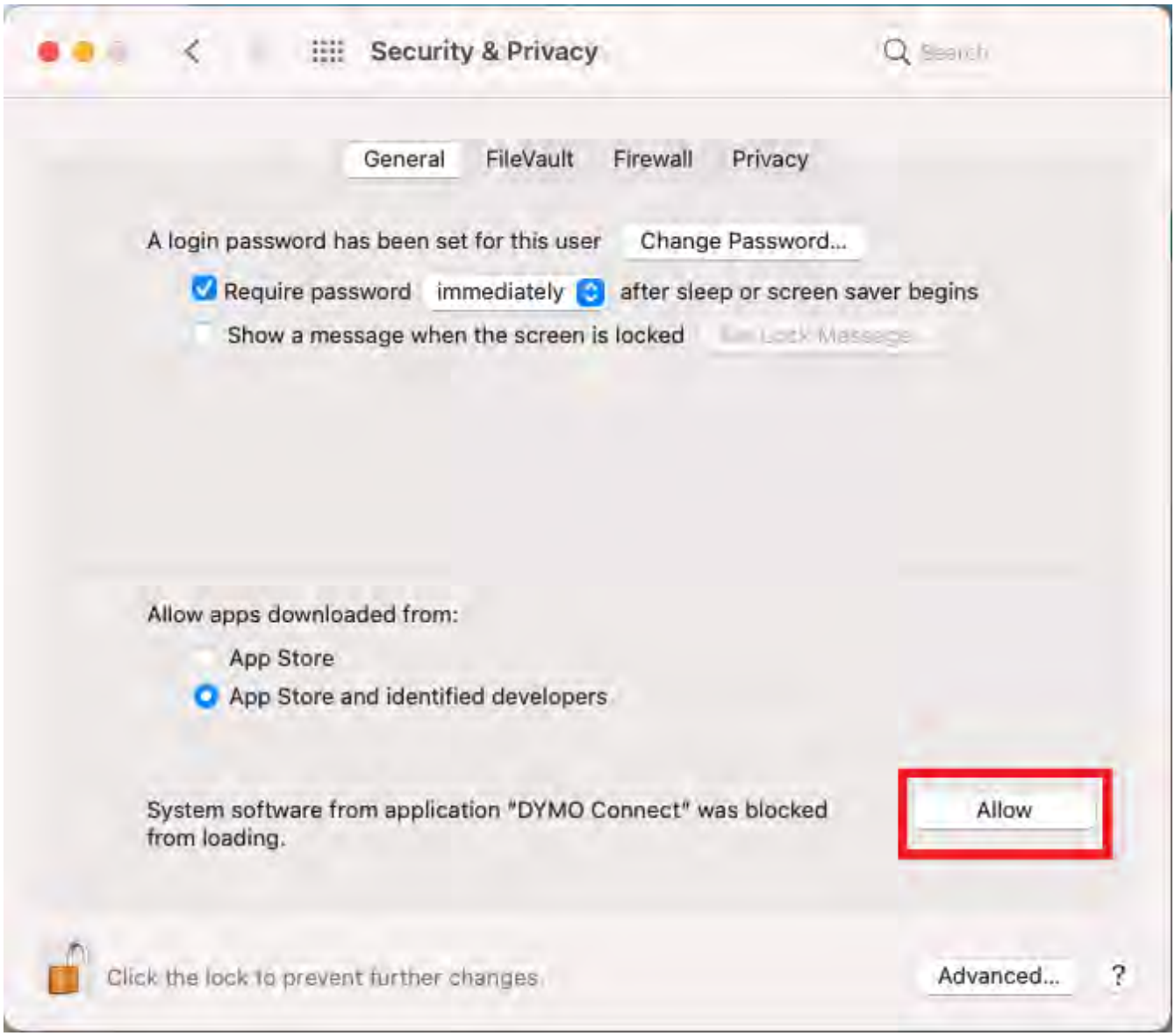
If your computer has a Macintosh operating system, after downloading DYMO software you must install it and configure your system to use a DYMO printer before printing labels from MR9.

Continued from Setting up for online label printing.

1. After downloading the Mac version, double-click the file in the Downloads folder.

2. Follow the instructions in the Install wizard.
3. When the Install wizard has completed the installation, click **Close.** (You can delete the installer from your hard drive once installation is complete.)
4. Double-click the DYMO program in your Applications folder if it didn't open automatically.

5. In the popup that appears, enter your system password and click **Install Helper.**
6. If a **System Extension Blocked** popup appears, click **Open Security Preferences.**
7. In the Security & Privacy screen, click the lock to make changes.
8. Enter your system password in the popup that appears, then click **Unlock.**
9. Click **Allow.**



10. Click the lock again, then return to the DYMO Connect app.

Reference

- DYMO
- Label Templates

Step-by-step instructions

- Setting up for online label printing
- Printing envelopes and labels
- Creating DYMO label templates
- Managing label templates

PDF

Portable Document Format (PDF) is the most popular file format for saving documents to preserve how they look (text formatting and images) when printed or viewed onscreen no matter what format they were originally saved as or what system they are viewed on. MR9 uses the PDF format for envelopes, FedEx labels, and UPS labels which you can print using Adobe Acrobat.

Reference

- Adobe Acrobat

Step-by-step instructions

- Printing envelopes
- Shipping via FedEx & UPS

Adobe Acrobat

Adobe Systems invented the Portable Document Format (PDF) in 1993, which is the file format MR9 uses for envelopes. When you generate envelopes in MR9's Envelopes and Labels, MR9 creates PDF files and downloads them to your device.

Reference

- PDF

Step-by-step instructions

- Printing envelopes

Printing labels

With a DYMO printer and MR9 Label Templates, you can print labels for correspondence or packages.

Continued from Printing envelopes and labels.

1. In the Envelopes and Labels window, **Print To** defaults to Label. Change the label defaults, if desired:

   - **Type**

     Select:

     - **Dymo Label (.label)** – If you are using DYMO Label Web Service to print labels. (This is discontinued software.)
     - **Dymo Label (.dymo)** – If you are using DYMO Connect to print labels.

     NOTE: Install DYMO application first to print labels

     If you have not installed and configured the DYMO application on your computer, a popup will appear instructing you to do so. You cannot print labels without the DYMO system set up for printing labels in a web environment and running. See Setting up for online label printing.

   - **Printer**

     Your DYMO printer appears by default. If you have multiple DYMO printers, select one in the dropdown.

     If you don't see your printer, click to refresh the printer list.

   - **Label**

     Select the type of label you want to print in the dropdown. (Labels are set up in Tools > Label Templates.)

2. Click **Print.**

NOTE: Set up custom label templates for company-wide use

Create DYMO labels customized to your company's needs, then store them in MR9 for everyone on your staff to use. To create DYMO label templates, see Creating DYMO label templates. To add your label templates to MR9, see Managing label templates.

Reference

- DYMO
- Label Templates

Step-by-step instructions

- Printing envelopes and labels
- Setting up for online label printing
- Creating DYMO label templates
- Managing label templates

Searching shipping

When clients call to find out where their order is, you can search for parts to check their shipping status including when and via what method you send them out. From search results you can update part status and other shipping information, follow up an order part's current location if sent via FedEx or UPS, and start new shipments on the same parts.

TIP: Initiate shipping from Turn In

To initiate shipping for a turned-in part, click **Shipping** at the top of the part's Turn In window, and the main Shipping window will open with all clients invoiced for that part listed. See Generating invoices.

1. **Production > Shipping**
2. To start a new shipment or track an existing shipment, enter text or make selections in one or more filters in the **Search By** pane of the Shipping window:
   - **Order No.**

     Order number associated with the service item(s) you are sending.
   - **Part No.**

     Works with **Order No.** Enter a part number (no need to include leading zeroes) to find invoice(s) for a single part of the order.
   - **Invoice No.**

     Invoice number associated with the service item(s) you are sending.
   - **Ship Date From/Ship Date To**

     Date or date range of previous shipments. Enter dates in these fields or click to select dates in the Date Navigator.
   - **Delivery Method**

     Default is ALL. Click to restrict search to invoices tied to one or more methods. See Lookup panel.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all parts that meet the search criteria. If you want to initiate shipping on a part that does not appear in the list, you must initiate shipping from the part's Turn In window. See Shipping to clients.

4. To:

- **Check shipping status or update info**
  Click the **Delivery Method** hyperlink of an invoice or order to access its details. See Tracking shipments.

- **Initiate a new shipment**
  See Shipping to clients.

Reference

- Turn In
- Date Navigator
- Lookup Panel
- Business Units

Step-by-step instructions

- Generating invoices
- Tracking shipments
- Shipping to clients

Shipping via FedEx & UPS

With your FedEx and/or UPS account(s), you can print official labels and track shipments without leaving MR9.

IMPORTANT: Set up accounts with FedEx & UPS first

Before you can print labels and track FedEx or UPS shipments, you must first obtain account information and a key from FedEx/UPS, then enter it in System Preferences > Production**.** (See FedEx Account for Shipping Labels preferences and UPS Account for Shipping Labels preferences.)

Continued from Shipping to clients.

1. Set up label

1. In the **FedEx/UPS Shipping Label panel,** if you want to use a different FedEx/UPS account than the default, select it from the **FedEx Account/UPS Account** drop-down. FedEx accounts are set up in System Preferences > Production > FedEx Accounts for Shipping Labels. UPS accounts are set up in System Preferences > Production > UPS Accounts for Shipping Labels.
2. MR9 fills in default shipping information:
   - **Ship From** fields default to your preferred business unit (set in User Preferences). Select a different BU, if needed.
   - **Ship To** fields default to the contact that matches the contact type selected in **Send To** (Sold To, Bill To, or Other). If:
     - **The Sold To/Bill To firm has a shipping address,** that address will print on the label. (See Entering firm addresses.)
     - **Other was selected in Send To,** enter **Ship To** information manually or click and look up the contact. (See Looking up contacts.) If any contact information is incorrect or missing, click . (See Updating contacts.)
3. If you don't want FedEx/UPS to verify the city, state, and postal code combination of the **Ship To** address, Slide **Validate Address** to No.
4. To enter or update label and shipping information, see Setting shipping label specifications.

2. Print label

1. Click **Download Label.** If:

- **The Ship To address is a P.O. box,** the message "If the Ship To address is a P.O. Box, delivery may not be possible. Do you still want to proceed?" will appear when you attempt to generate the label. Click **Yes** if you still want to use the P.O. box address. If you want to use a different address, select Other in **Send To** dropdown and follow instructions above for Other.
- **The Validate Address window appears,** FedEx/UPS was unable to verify the address as entered. Recommended addresses will appear below the **Ship To** address originally entered in MR9. To print using:
  - **The original address** – Click **Skip.**
  - **A recommended address** – Click radio button for the desired address, then click **Replace.**

2. MR9 generates a PDF label, downloads it to your device, and closes the **Print FedEx/UPS label** panel.
3. In the New Shipment window, the **Tracking No., Ship Date,** and **Estimated Shipping Cost** fields automatically populate with information from FedEx/UPS.
4. To track the shipment, see Tracking shipments.

NOTE: Alert Billing department of shipments

If your billing department does not invoice an order until it has shipped, notify them by changing the order's status to Shipped. See Changing order or part status.

Reference

- Business Unit
- User Preferences
- Production preferences
- Business Units
- Sold To vs. Bill To
- PDF

Step-by-step instructions

- FedEx Account for Shipping Labels preferences
- UPS Account for Shipping Labels preferences
- Shipping to clients
- Entering firm addresses
- Looking up contacts
- Updating contacts
- Setting shipping label specifications
- Tracking shipments
- Changing order or part status

Setting shipping label specifications

Enter label and shipping specifications when preparing labels, or save time by creating default labels with this information, which can be edited when preparing individual labels.

Continued from FedEx Account for Shipping Labels preferences, UPS Account for Shipping Labels preferences, or Shipping via FedEx & UPS.

1. In the **Default Value for Services/Services** pane:

   - ***Service Type**

     Required. Delivery time options

   - **Pickup/Drop-off**

     FedEx only

     Package location options

   - **Signature Type**

     FedEx only

     Whether or not you require a recipient signature acknowledging delivery, and if so, what kind of signature.

   - **Send Shipment Notifications (Email)/Send Email Notifications**

     Slide to Yes if you want the recipient to be alerted via email so they can track their shipment online.

   - **Receive Shipment Notifications (Email)**

     FedEx only

     Slide to Yes if you want to receive email alerts about the shipment.

   - **Receive Confirmation of Delivery (extra fee)**

     UPS only

     Slide to Yes if you want the recipient to confirm to you via UPS that they received the shipment.

   - **Deliver Without Signature**

     UPS only

     Slide to Yes if you do not require the recipient to sign for the shipment.

   - **Saturday Delivery/Deliver on Saturday (extra fee)**

     Slide to Yes if you want the shipment delivered on a Saturday.

- **Saturday Pickup**

  FedEx only

  Slide to Yes if you want to have FedEx get the package from you on a Saturday.

2. In the **Default Value for Package Information/Package Information** pane:

   - ***Package Type/*Packaging Type**

     Required. Packaging options.

   - ***Dimension(inch) L*W*H**

     FedEx only

     Required. The package's measurements in inches, one dimension per field.

   - ***Weight(lb)**

     Required. Package's weight in pounds.

   - **Declared Value**

     How much the package is worth, for insurance purposes.

   - **Include a return label**

     FedEx only

     Slide to Yes if you want to give the recipient the ability to return the package to you with the delivery fee charged to your account. Then select a delivery turnaround option in **Return Service Type.**

   - **Return Service Type**

     Default is FedEx 2Day *(uneditable*).

   - **Price Option**

     Default is FedEx Standard Rate. Select FedEx One Rate to use the simplier flat rate shipping option.

3. In the **Default Value for References/References** pane:

   If you want to include MR9 information on the label — such as the invoice number, order number and/or record name — Slide to Yes for up to 3 options (FedEx) or 2 options (UPS):

   - **Print Invoice No.**

     The related MR9 invoice number.

   - **Print Order No. in Purchase Order Number section**

     The related MR9 order number.

   - **Print Record in Department Number section**

     The related record name from MR9.

- **Custom Reference**

  Any other information relevant to the shipment that you want to appear on the outside of the package.

4. In the **Default Value for Shipping Label/Shipping Label** pane:

   Label Image Type

   If you have a special printer that requires a particular type of file, choose the file type in the dropdown. Otherwise, leave it as the default file type.

Step-by-step instructions

- FedEx Account for Shipping Labels preferences
- UPS Account for Shipping Labels preferences
- Shipping via FedEx & UPS

Tracking shipments

When clients call to find out where their order is, you don't have to leave MR9 to check the shipping status. Use the Shipping function to quickly follow up an order's current location if sent via FedEx or UPS. You can also update information about the shipment and its related part, firms, and contacts.

1. Track shipping

1. To find a shipment to track, see Searching shipping.
2. After clicking the part's **Delivery Method** hyperlink in the Shipping results grid, click **Tracking No.**'s in the View Shipment window to see where a FedEx or UPS shipment is at any time.

   MR9 automatically opens the related shipping company's webpage in your browser showing the current status of your shipment.

2. Update details

1. In the View Shipment window, click **Edit** if you want to update information such as part status or the estimated shipping cost. See Shipping to clients.
2. Click **Save >**
   - **Save & Edit:** To save your changes and make more edits to same shipment.
   - **Save & Close:** If you have no more updates at this time.

Step-by-step instructions

- Searching shipping
- Shipping to clients

Uploading files to a repository

Store files in their related repository within individual orders, parts, records, invoices, firms, contacts, and locations.

File name length can be up to 256 characters so you can write detailed file names to make it easier to distinguish files in your repositories.

Categorize files by selecting their file type to make searching easier and to have MR9 automatically attach relevant files to emails.

Publish specific repository files and designate who can have access to them through MR Connect. Send email alerts to contacts that files are available for download.

You can upload files of any type and size to MR9's repositories. However, we generally do not recommend uploading files over 100MB in size. Instead, break up large files into several smaller files before uploading.

Save time by uploading multiple files at a time.

Continued from Using repositories.

1. Access a repository

Click in the **Repository** pane of an Edit window for a contact, firm, location, order, part, record, or invoice. The **Select Files** panel appears.

2. Select file(s) to upload

1. In MR9 you can upload files to the repository in 2 ways:
   - **Drag and drop** your file(s) into the dotted-border field.
   - **Click the dotted-border field,** then locate and select your file(s) from your computer.
2. The file(s) you selected will appear above the dotted-border field. If you selected the wrong file to upload, click .
3. Continue adding files if desired.
4. When finished, click **Next.**

3. Set file options

In the **New Repository** panel, enter values for the uploaded file(s):

- **File Type**
  Required. Select the category the file belongs to, such as Billing Records or Exhibit, in the dropdown. (File Types and default are set in Lists > Repository.)

- **Publish**
  Yes by default, slide to No if you do not want to give online access to the file through MR Connect to clients.

- **Access Type**

  Repository files are always accessible to your office, and the default access is ALL, meaning others have access through MR Connect. You can restrict access to your company only or your office and clients by selecting from this dropdown.

  NOTE: Restrict individual contacts' access to a file

  You can turn off specific contacts' access to specific files in the Record-level repository in Turn In so they are unable to download and view those files from MR Connect. For example if Record A has a medical record, billing records, and exhibits in the repository, you can designate that Contact 1 can access only the medical records and exhibits in Record A, while Contact 2 can access only the billing records. See Restricting contacts' file access.

- **Description**

  Works with **File Type.** Click to select a repository file description from the contextual list in the **Lookup Repository Description** panel. (Preset descriptions are set in Repository Descriptions.) Edit the description if necessary. You can also enter a description from scratch. If the file is published, any text entered here appears in MR Connect.

TIP: Speed option setting

When uploading multiple files at once, save time setting file options for some or all of the files at the same time:

1. In the **New Repository** panel, click **Set Value > Access Type/File Type/Publish.**
2. In the **Set Value** panel, set the option's value (such as File Type: Exhibit).
3. Check the boxes of the files in the **Apply To** list you want to have that value.
4. Click **OK.**

4. Upload file(s)

1. In the New Repository window, click **Upload file(s).**

   If a file with the same name already exists in the Repository, a popup message appears telling you to rename the new file and try again. Click **OK.** Rename the file and try again. Or if you want to replace the existing repository file, delete the existing file first before uploading the new file again. See **Deleting files** in Using repositories.

2. To alert contacts that the file is available to download from MR Connect, see Alerting clients.

NOTE: Other types of file uploads

You can also upload:

- **Image files of your company logo** to use in correspondence. See Adding your company logo to invoices.
- **Files as attachments to emails.** See Composing emails.

Reference

- MR Connect
- Lists > Repository
- MR Connect
- Turn In
- Repository Descriptions
- Results pane

Step-by-step instructions

- Using repositories
- Uploading files to a repository
- Restricting contacts' file access
- Setting up repository descriptions
- Using repositories
- Alerting clients
- Adding your company logo to invoices
- Composing emails

Searching repositories

Search for files in a single repository or across all repositories at once — saving you time over searching for files within individual entities in other functions. Use filters to narrow results returned. In the results you can see information about the files at a glance, bulk update file values, download, or delete files — all without leaving the main screen. Then access individual files to view their details including download history and update some information.

Continued from Using repositories.

1. **Production > Repository**
2. In the Repository window's **Search By** pane, no specific filter is required but you must use at least one in addition to **Repository Level:**

   - **Repository Level**

     Default is ALL. To search a single repository, click ▾ and select one in the dropdown. Depending on the repository selected, not all of the following choices will be available.

   - **File Type**

     Default is ALL. Click to select specific type(s) to search. See Lookup panel. (File Types are set in Lists > Repository.)

   - **File Name**

     Enter part of the file name to find a particular file.

   - **Date Type**

     To search by a different date type, click ▾ and select a different category in the dropdown, depending on the repository you are searching.

     - **Invoice Date** – *ALL and Invoice repositories only.* Date order was billed.
     - **Part Order Date** – *ALL, Part, and Record repositories only.* When the related part was ordered.
     - **Upload Date** – Default. When the file was uploaded to MR9.

   - **Date From/Date To**

     Works with **Date Type.** Enter dates in these fields or click to select dates in the Date Navigator.

   - **Uploaded By Type**

     Default is User. If your clients upload files through MR Connect, you can search files uploaded by them by selecting Contact in this dropdown.

- **Uploaded By**

  Restrict the search by specifying the person who uploaded the file(s). Click , then in the **Lookup User/Contact** popup, find the person's name. See Looking up users/Looking up contacts.

- **Order No.**

  Not available in Contact, Firm, or Location repositories

  Enter an order number to find files related to a single order.

- **Part No.**

  ALL, Invoice, Part, and Record repositories only

  Works with **Order No.** Enter an order number above, then enter the part number (no need to include leading zeroes) in this field to find files related to a single part.

- **Invoice No.**

  ALL and Invoice repositories only

  Enter an invoice number to find files related to a single invoice.

- **Firm**

  ALL, Firm, and Contact repositories only

  Click to look up and select a single firm. See Looking up firms.

- **Contact**

  ALL and Contact repositories only

  Click to look up and select a single contact. See Looking up contacts.

- **Location**

  ALL and Location repositories only

  Click to look up and select a single location. See Looking up locations.

3. Click .
4. MR9 displays all files that meet the search criteria along with information about each file. To:
   - **Quickly view a file's details** – Scroll horizontally through the grid.
   - **View (and update) details,** including the file's description and download history – See Viewing & updating repository file details.
   - **Quickly update settings** for a file or group of files – See Updating file values quickly.

Download file(s) – Check the box(es) of file(s) you want to download, then click **Download.** If a popup appears, click **Allow.**

- **Delete file(s)** – Check the box(es) of file(s) you want to delete, then click **Delete.** In the popup that appears, click **Yes.**

TIP: Set up the results grid to work for you

The Repository's results grid layout is customizable. You can hide or show any column, rearrange the column order, stretch or shrink column widths, designate which column to sort results by in ascending or descending order, and choose which columns you want to always be visible when scrolling through the results. You can save your custom grid layout or return to the default layout. See Customizing grids.

Reference

- Lookup panel
- Lists > Repository
- Date Navigator
- MR Connect

Step-by-step instructions

- Using repositories
- Looking up users
- Looking up contacts
- Looking up firms
- Looking up locations
- Viewing & updating repository file details
- Updating file values quickly
- Customizing grids

Downloading & viewing files

You can access repository files from the central repository or within an order, part, record, invoice, firm, contact, or location.

Download files to share or archive elsewhere. To view a repository file, download it, then open it in the associated program. (To view and edit MR9 information about a file — but not the file itself — see Viewing & updating repository file details.)

Continued from Using repositories.

1. Access file(s)

- **From central repository**

  1. **Production > Repository**
  2. In the Repository window, search for the file(s). See Searching repositories.

- **Directly**

  In any View/Edit window or panel that has a repository, scroll or jump to the **Repository** pane. To access files stored in part or record repositories, you must first access the part or record through their related order then jump to the part/record's **Repository** pane.

2. Download & view file(s)

1. Check the box(es) of any file(s) you want to download/view. Then:
   - **In central repository,** click **Download.**
   - **In a View/Edit window,** click .
2. MR9 downloads and saves the file(s) based on your browser preferences. Depending on your browser, the file(s) might also automatically open in the program on your device associated with each file's file type. Otherwise, locate the file(s) on your device to open and view. If you download more than one file at a time, they will be saved together in a folder labeled with the download date on your device.

TIP: Download a file from its detail panel

You can download a file from within its detail window, see Viewing & updating repository file details.

TIP: If only the first file of a multi-download appears, check the Trash

If you are using Safari v17 or higher version on MacOS, the default is to automatically open the first file of the zip file created for downloading. Safari puts the zip file in your

Trash folder. Move the zip file out of the Trash folder to unzip and recover the rest of the files. If you prefer to not have Safari do this, go to **Safari > Setting > General** and uncheck the **Open "safe" files after downloading** box. Safari will then save zip files to your Downloads folder.

NOTE: Opening downloaded files

The file extension following the period in the file name (usually three letters like "doc" or "pdf") tells your computer which program to use to open the file. Sometimes though, when you try to open a file, a window appears asking which program to use to open the file. This happens when you do not have a *file association,* which means that either you do not have a program registered to open the file or you do not have a program that is capable of opening that type of file. You must install and/or register a program that can open these files.

Sometimes after installing a new program, the new program takes over opening certain types of files. If you want the files to open in a different program, you must change the file association of these types of files to your preferred program.

To find out how to register or change the file association, refer to your operating system's Help.

Reference

- MR Connect

Step-by-step instructions

- Viewing & updating repository file details
- Using repositories
- Searching repositories

Viewing & updating repository file details

View a file's details, including its download history. See which contacts can access files in an order or part. Update information about files, such as file and access types. Download files to view, print or email.

Continued from Using repositories.

1. Access file

1. To view details, including the file's download history, find the file in:

   - **Individual repository**

     In a View/Edit Order/Part/Record/Invoice/Firm/Contact/Location window, scroll or jump to the **Repository** pane.

     Any files in individual repositories are listed with their name, file type, upload date, published status, access type, and description.

   - **Central repository**

     In **Production > Repository,** search for the file. See Searching repositories.

     File entries in the Repository grid list all of the information that appears in the individual repository above, except description. They also list the repository they are stored in, file size, who uploaded the file, the client that placed the order, and location. Depending on which repository they are located in, they may include order number, part number, related patient or subpoenaed witness name (Records Of), case, part order date, invoice number & date, and information about the record.

2. For more information than what's listed in the repository grid, click the file's hyperlinked **File Name.**

2. View details

1. In the View Repository window, depending on which repository and how accessed, you can view the following:

   - **Firm**

     Central repository only > Firm or Contact level

     In a firm's View Repository window, click to view/edit the firm. See Updating firms.

   - **Contact**

     Central repository only > Contact level

Click to view/edit the contact. See Updating contacts.

- **Invoice No. & Invoice Date**

  Central repository only > Invoice level

  Click **Invoice No.'s** to view/edit/preview/send the invoice. See Viewing & sending single invoices.

- **Location**

  Central repository only > Location or Part level

  In a location's View Repository window, click to view/edit the location. See Updating locations.

- **Order No.**

  Central repository only > Order level

  Order number is assigned by the system and cannot be changed *(uneditable*).

- **Records Of**

  Central repository only > Order, Part or Record level

  In an order's View Repository window, click **Records Of's** to view/edit the order. See Updating orders.

- **Case Name**

  Central repository only > Order, Part or Record level

  Name of the case related to the order *(uneditable*).

- **Order.Part No.**

  Central repository only > Part or Record level

  Order.part number is assigned by the system and cannot be changed *(uneditable*).
  Click **Order.Part No.'s** to view/edit the part. See Updating parts.

- **Part Order Date**

  Central repository only > Part or Record level

  Click **Order.Part No.'s** to view/edit the part including the part's order date *(uneditable in Repository).* See Updating parts.

- **Record**

  Central repository only > Record level

  Click to view/edit the record. See Updating records.

- **Repository Level**

  Central repository only

Repository where the file is stored. Depending on the repository level, additional fields identify the MR9 entry attached to the file.

- **File Type**

  Category the file belongs to, such as Billing Records or Exhibit. (File Types and options are set in Lists > Repository.)

- **File Name**

  Complete file name including the file extension. Click to download the file.

- **File Size**

  In kilobytes (1KB=1000bytes).

- **Publish**

  If Yes, file is accessible via MR Connect.

- **Access Type**

  Which types of entities have access to this file via MR Connect.

- **Description**

  Any information entered when the file was uploaded or updated.

- **Uploaded**

  Time stamp of who uploaded the file and when.

- **Last modified**

  Time stamp of who last modified the file and when.

2. To access more options, click **More >**

- **View Download Log**

  In the **View Download Log** panel, anyone who has downloaded the file from this repository is listed along with the date and time of download and their **Entity Type** (User or Contact). Click **Close.**

- **View Accessible Contacts**

  (Only in Repository panels of Edit Record panels and View Invoice/Edit Invoice windows or panels)

  In the **View Accessible Contacts** panel, all contacts who can access the file via MR Connect are listed, along with their **Firm** and **Access-Level.** Click **Close.**

  TIP: Restrict individual contacts' access to a file

  If you are in the Record-level repository of an order in Turn In, you can turn off a listed contact's access to the selected file. See Restricting contacts' file access.

3. Update details

1. To update:

   - **Individual repository**
     In the View Order/Part/Record/Invoice/Firm/Contact/Location window, click **Edit.** Then click the file's hyperlink in the **Repository** pane.

   - **Central repository**

     In the central repository's View Repository window, click **Edit.**

2. In the Edit Repository window, not all fields are editable. You can update:

   - **File Type**

     Select the category the file belongs to, such as Billing Records or Exhibit, in the dropdown. (File Types and options are set in Lists > Repository.)

   - **Access Type**

     Restrict access to your company only, or your office and clients by selecting from this dropdown.

   - **Publish**

     Yes by default, slide to No if you do not want to give online access to the file through MR Connect to clients.

   - **Description**

     Any text entered here appears as the file description in MR Connect repositories.

4. Download file

To download the file, click in the View Repository/Edit Repository window. See Downloading & viewing files.

TIP: Download from the repository grid

You don't have to go into an individual file's View Repository/Edit Repository window to download it. You can download files directly from:

- The central repository's results grid by checking the box next to the file name and clicking **Download.**
- Any View/Edit Order/Part/Record/Invoice/Firm/Contact/Location window's **Repository** pane by checking the box next to the file name and clicking .

5. Delete file

1. To remove the file from your repository, click **Delete** in the **Edit Repository** panel.

2. Click **Yes** in the popup.

TIP: Delete files from the repository grid

You don't have to go into an individual file's View Repository/Edit Repository window to delete it. You can delete files directly from:

- The central repository's results grid by checking the box next to the file name and clicking **Delete.** Then click **Yes** in the popup.
- Any View/Edit Order/Part/Record/Invoice/Firm/Contact/Location window's **Repository** pane by checking the box next to the file name and clicking . Then click **Yes** in the popup.

TIP: Quickly update file values for multiple files

Instead of editing files one at a time to change their File Type, Access Type, or Publish status, you change them all at once to the same value in a Repository grid. See Updating file values quickly.

Reference

- Turn In
- Lists > Repository
- MR Connect

Step-by-step instructions

- Using repositories
- Searching orders
- Searching firms
- Searching contacts
- Searching locations
- Updating orders
- Updating parts
- Updating records
- Searching repositories
- Updating firms
- Updating contacts
- Viewing & sending single invoices
- Updating locations
- Restricting contacts' file access
- Downloading & viewing files
- Updating file values quickly

Alerting clients

If you have MR Connect, email clients to tell them they can access their files after you have published them online.

Continued from Using repositories, Uploading files to a repository, or Updating records.

1. Select files

1. In the **Repository** pane of a record or invoice, check the box(es) of any file(s) you want to mention in an alert email to a client.
2. Click .

2. Select recipients

1. In the **Send To** panel, your MR Connect site name appears in the **Connect Site** dropdown. If you have more than one MR Connect site connected to your MR9 database, you can select the appropriate one in the dropdown. (Your site name is set in General Connect preferences.)
2. In the **Send To** panel, relevant contacts are listed and selected in the **Accessible Contacts** pane. Uncheck the box for any contact you do not want to notify. Types of contacts listed depends on the type of repository:
   - **An invoice's repository** – The Sold To contact is listed.
   - **A record's repository** – Sold To contacts and Record Parties are listed.
3. Any of the contacts' Have Access seniors are also listed but not selected. Check the box for any of these contacts you want to notify.
4. If a contact does not have a checkbox, they do not have an email address in their listing. To add their email address, see Entering general contact information.
5. Click **Next.**

3. Customize & send alert

1. In the **Email** panel, the email recipient(s) you selected under **Accessible Contacts** appear in ***To.** Default information from your preferences appears in ***Subject** and ***Message.** (Defaults are set in Connect Preferences > Contact–Repository.) You can edit recipients, add Cc's and Bcc's, edit content, and attach files. See Composing emails.
2. Click **Send.** MR9 sends the email and logs it into the Email Log.

Reference

- MR Connect
- General Connect preferences
- Seniors
- Contact–Repository preferences
- Email Log

Step-by-step instructions

- Using repositories
- Uploading files to a repository
- Updating records
- Adding ordering parties
- Entering general contact information
- Composing emails

Updating file values quickly

Quickly classify files for proper user access and availability, by setting what types of users can access a file, where the file will be accessible and what kind of file it is, and if access via MR Connect is permitted, for one or more repository files related to a single entity, order, part, or record, or across repositories.

Continued from Using repositories.

1. To find files to update:

   - **Individual repository**
     In a View Firm/Contact/Location/Order/Part/Record/Invoice window, scroll or jump to the **Repository** pane. All files uploaded to this individual entity, part, order, or record appear. Click **Edit.**

   - **Central repository**
     In **Production > Repository,** search for the file(s). See Searching repositories.

2. In the list of repository files, check the box(es) of all the files you want to update to the same value.

3. Click **> Set [option below]** (in a **Repository** pane) or **Set Value** (in **Production > Repository) >**

   - **Access Type**

     In Repository panes only

     In the **Set Value** panel, set the file(s)' MR Connect access in the dropdown to:

     - **ALL:** Your staff and clients
     - **Contacts and Office:** Your staff and clients
     - **Office Only:** Your company staff

   - **File Type**

     In the **Set Value** panel/popup, select the category the file(s) belong to, such as Billing Records or Exhibit, in the dropdown. (File Types and options are set in Lists > Repository.)

   - **Publish**

     In the **Set Value** panel/popup, slide to Yes to give online access to the file through MR Connect to clients as restricted by the file(s)' **Access Type.** Slide to No if you do not want to give online access to the file.

4. Click **OK.**

Reference

- Lists > Repository
- MR Connect

Step-by-step instructions

- Using repositories
- Searching repositories

Batch-posting invoices

You can post invoices as you create them in Turn In, or save time by posting multiple invoices at once in Post Invoices. You can also calculate invoices, preview invoices, and send/archive invoices from this function. Once posted, an invoice cannot be deleted.

Continued from Finalizing invoices, Searching unposted invoices, Previewing invoices, or Creating invoices for multiple parts at once.

1. If you haven't already found invoices to post in Post Invoices, see Searching unposted invoices. In the Post Invoices results pane, check the boxes of invoices you want to post. (If you haven't previewed the invoices yet, see Previewing invoices.)
2. Click:
   - **Post** – To only post the invoices.
   - **Post & Archive** – To post and save the invoices as PDFs to the repository at the same time.
3. MR9 posts the invoices and removes them from the results pane. A popup appears. Click:
   - **Yes** – To send the invoices to the ordering clients (and/or archive them if you selected **Post** above). This opens the Send Invoices window with these invoices listed and selected in the results pane. See Sending & archiving invoices in batches.
   - **No** – To post the invoices in MR9 without sending a copy to the clients (or archiving the invoices if you selected **Post** above). You can send and/or archive the invoices later in the Send Invoices function.

TIP: When an invoice can't be posted

If an invoice does not have a checkbox in the Post Invoices window results pane, either it:

- Needs to be calculated. See Getting invoices ready to print.
- Is COD and cannot be posted. See Working with COD invoices.
- Has zero billable charges. See Generating invoices.

Reference

- Results pane
- Send Invoices
- COD invoices

Step-by-step instructions

- Finalizing invoices
- Searching unposted invoices
- Previewing invoices
- Creating invoices for multiple parts at once
- Sending & archiving invoices in batches
- Getting invoices ready to print
- Working with COD invoices
- Generating invoices

Viewing & sending single invoices

MR9 stores more information for each invoice than what normally appears on a posted invoice. You can view and update details in individual invoices without going back to Turn In. Send the original or current invoice to the client. You can also perform other functions — such as updating client and order information, uploading files to the repository, and exporting grids.

Continued from Searching unposted invoices, Sending, resending, & archiving invoices, Sending & archiving invoices in batches, Searching for posted invoices, Viewing client activity, Viewing & updating repository file details, Finding overdue invoices. or Viewing paid invoices.

1. View & update invoice details

In a View Invoice window, you can scroll or jump to different panes to view details.

1. If you want to add or edit any information, click **Edit** in the View Invoice header.
2. In the Edit Invoice window, not all information is editable. You can enter/update some text and selections:

   - ### General

     Basic information about the invoice and its related client(s) and order.

     - **Invoice Date** – *(Editable in unposted invoices only.)* If you want to backdate the invoice, edit date or select new one in Date Navigator.
     - **Original** – *(Editable in unposted invoices only.)* Slide to Yes if the party is paying for the original.
     - **COD** – *(Editable in unposted invoices only.)* Defaults to the firm's C.O.D. setting. Change the setting for this invoice only by clicking on the slider.
     - **Print details on invoice** – Slide to Yes to have services listed on the invoice.
     - **Invoice Message** – Your default/previously selected Invoice Message appears. Override for this order by entering the text you want or click to select a different invoice message in the **Lookup Invoice Message** panel. See Lookup panel. Messages and the default are managed in **Setup > Invoice Messages.** (See Setting up invoice messages.)
     - Click any active to view and edit details about the related client, order, or part. (See Updating firms, Updating contacts, Updating orders, or Updating parts.)

- **Additional**

  Client-submitted information related to the order, such as e-billing data.

  - To enter or update miscellaneous billing information, including electronic billing information, see Adding optional billing information to invoices.

- **Orders**

  Record type and billed service item(s) information. Includes billed and outstanding amounts for taxes, fees, discounts, and other charges. *Not editable.*

- **Receivable Transactions**

  Not in Post Invoices

  Information about any payments or other transactions related to this invoice, including amounts applied to discounts, fees, and other charges.

  To view payment details, click the hyperlinked **Transaction Type.** In the **View Payment** panel, no fields are editable but you can review the payment and:

  - **Update the MR9 listing** for the firm making the payment by clicking next to the **Payer** field. See Updating firms.
  - **View the details of other invoices** the payment was applied to by clicking their hyperlinked **Invoice No.** The invoice will open in a **View Invoice** panel with the same options as the original invoice's window.

- **Repository**

  Invoice-related files, such as the invoice PDF.

  - Upload, delete, or download files. See Using repositories.
  - Notify clients that the files are uploaded to MR Connect. See Alerting clients.
  - Set file values. See Updating file values quickly.

- **Notes Log**

  Automatic and manually entered notes about the invoice.

  - View and add log entries. See Managing notes logs.

3. In the Edit Invoice window, click **Save** to save your updates and return to the main function window.

2. Send invoice

Not available in Post Invoices or Repository

1. To send the invoice from the Send Invoices or View Invoice window, click **Send >**

- **Email Original Invoice** – To email the invoice as originally billed.
- **Print Original Invoice** – To print and mail the invoice as originally billed.
- **Email Current Invoice** – To email the invoice showing the current balance along with credits, payments and finance charges.
- **Print Current Invoice** – To print and mail the invoice showing the current balance along with credits, payments and finance charges.
- **Archive Original Invoice** – *(Send Invoices only)* To store the invoice(s) as originally billed in your MR9 repository.

TIP: Preview invoices

Choose one of the print options to have MR9 display a facsimile of the invoice so you can check that it is correct before sending to the client.

2. Depending on your selection:

   - **If you chose an email option**
     See Emailing from MR9. Emails include the PDF version of the related invoices. After sending the email, MR9 makes an entry recording the email in the **Notes Log** of the invoice.
   - **If you chose a print option**
     MR9 opens the invoice in the Print Invoices window. To view/hide line item charges, click **Turn detail on** or **Turn detail off.** Click . When finished, click **Close.** See Printing invoices, statements, & reports.
   - **If you chose the archive option**
     MR9 saves the invoice in PDF format to MR9's repository. When it finishes, click **OK** in the popup that appears.

NOTE: You cannot send unposted invoices

If you are viewing an unposted invoice from the Post Invoices function, there is no Send button because you must post the invoice first before sending it to the client. See Batch-posting invoices.

3. Export/print grids

You can export and print the grid in any pane that has an button. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel

- COD invoices
- MR Connect
- Notes Logs

Step-by-step instructions

- Searching unposted invoices
- Sending, resending, & archiving invoices
- Sending & archiving invoices in batches
- Searching for posted invoices
- Viewing client activity
- Viewing & updating repository file details
- Finding overdue invoices
- Viewing paid invoices
- Setting up invoice messages
- Updating firms
- Updating contacts
- Updating orders
- Updating parts
- Adding optional billing information to invoices
- Updating firms
- Using repositories
- Alerting clients
- Updating file values quickly
- Managing notes logs
- Emailing from MR9
- Printing invoices, statements, & reports
- Batch-posting invoices
- Exporting & printing results

Purging COD invoices

It is recommended that you periodically purge old COD invoices. For example you might want to delete any COD invoices that are more than 90 days old on a monthly basis.

1. Find old invoice(s)

1. **Billing > COD Invoices**
2. In the **Search By** pane, use the Date Navigator to enter a date (90 days in the past, for example) in **Invoice Date To,** then click .
3. MR9 displays all invoices that are older than the cut-off date. Copy the **Order. Part No.** of an invoice you want to purge from the results grid.

2. Delete invoice

1. **Production > Turn In**
2. Paste the order number into the **Search By** pane's **Order No.** field, then click .

   ### NOTE: Order No. field strips out part number

   When you paste the **Order.Part No.** from COD Invoices, MR9 includes the **Order No.** only in the field. If you want to search for the specific part's invoice only, enter the part number separately in **Part No.** (no need to include leading zeroes) before clicking .
3. In the search results, click the **Order.Part No.'s** **> Edit** or click its hyperlink and then click **Edit** in the Turn In–Order window.
4. Click the COD invoice's hyperlinked **Invoice No.**
5. In the **Edit Invoice** panel, click **Delete.**
6. Click **Yes** in the popup that appears.

Reference

- Date Navigator
- Turn In

Step-by-step instructions

- Working with COD invoices

Sending & archiving invoices in batches

Send multiple invoices to ordering clients via their preferred method — e.g., email or print — or archive the invoices in PDF format to your repository at once. You can also preview any invoice here before sending/archiving, update invoice details, and send individual invoices to clients.

Continued from Sending, resending, & archiving invoices, Batch-posting invoices, or Searching for posted invoices.

1. Preview invoices

Before sending invoices, you can preview them to check for errors.

1. To preview an invoice in the Send Invoices window, click next to the invoice and select:
   - **Preview Current Invoice** – To view the invoice showing the current balance along with credits, payments, and finance charges.
   - **Preview Original Invoice** – To view the invoice as originally billed.
2. To view/hide line item charges, export, or print the invoice, see Previewing invoices.

2. View invoice details

Click a hyperlinked **Invoice No.** in the results grid to view and update invoice details. You can also send the invoice to the client directly from the invoice detail screen. See Viewing & sending single invoices.

3. Send/archive invoices

1. When ready to send or archive invoices, click in the top left of the Send Invoices results grid header and check one or more of these boxes in its dropdown:
   - **Don't Send** – To select clients who do not receive invoices (for archiving invoices).
   - **Email** – To select clients who want emailed invoices.
   - **Print** – To select clients who want invoices mailed or otherwise delivered.

TIP: Set up contacts' invoice and statement preferences

If a contact prefers emailed or printed invoices, enter their preferences in their MR9 listing. If they do not want to receive invoices because someone else in their office handles the bills, you can set the preferred email address for their invoices. You can

set the same preferences for receiving statements too. See Entering additional contact information.

2. Click **Apply.** MR9 selects all the invoices whose contact preferences match your choice(s). Uncheck the box for any invoice you do not want to send this time/check the box for any invoice you want to send.

3. Click **Send Invoices >**

   - **Email Original Invoices** – To email the invoice(s) as originally billed.
   - **Print Original Invoices** – To print and mail the invoice(s) as originally billed.
   - **Email Current Invoices** – To email the invoice(s) showing the current balance along with credits, payments and finance charges.
   - **Print Current Invoices** – To print and mail the invoice(s) showing the current balance along with credits, payments and finance charges.
   - **Archive Original Invoices** – To store the invoice(s) as originally billed in your MR9 repository.

4. Depending on your selection:

   - **If you chose an email option**
     See Emailing from MR9. MR9 sends the emails to the contact's preferred **Accounting Notification Type** email address (see Managing notification emails). After sending the email, MR9 makes an entry recording the email in the Notes Log of the invoice(s).

   - **If you chose a print option**
     MR9 opens the invoice(s) in the Print Invoices window. Invoices print with the billing address specified in the Bill To Firm's set-up (see Entering general firm information). To view/hide line item charges, click **Turn detail on** or **Turn detail off.** Click . When finished, click **Close.** (See Printing invoices, statements, & reports.) MR9 makes an entry noting when the invoice was sent to your printer in the Notes Log of the invoice(s).

   - **If you chose the archive option**
     MR9 saves the invoice(s) in PDF format to MR9's repository. When it finishes, click **OK** in the popup that appears.

   NOTE: Send options override contact preferences

   If you selected invoices by applying more than one send option, the **Send Invoices >** option you select here will override the contacts' preferences for all of the checked invoices. In other words, if you checked both **Email** and **Print** options to select invoices and then chose **Send Invoices > Email Original Invoices,** MR9 will email

all the selected invoices to the contacts — even if their preference is **Print.**

5. MR9 displays the results of your Send method in each selected invoice's **Result** column. If you continue to send/archive invoices here, only the results for the currently selected invoice(s) appear.

Reference

- Results pane
- Notes Log

Step-by-step instructions

- Sending, resending, & archiving invoices
- Batch-posting invoices
- Searching for posted invoices
- Previewing invoices
- Viewing & sending single invoices
- Entering additional contact information
- Emailing from MR9
- Managing notification emails
- Entering general firm information
- Printing invoices, statements, & reports

Electronic billing

Electronic billing, otherwise known as e-billing, is the method of submitting an invoice to a customer in a format readable by its computer or database systems.

NOTE: E-billng saves your clients money

Traditionally, invoices have been submitted to customers in paper format. By processing electronic bills, corporations recoup savings in paper handling and processing costs. It can also save your clients money over emailed PDF invoices by eliminating the need to re-key the information into their systems.

Reference

- LEDES format
- UTBMS codes
- ABA Litigation Code Set

Step-by-step instructions

- Entering UTBMS codes for service items
- Entering electronic billing information
- Exporting invoices in LEDES format

LEDES format

MR9 invoices can be exported in LEDES format. The **Legal Electronic Data Exchange Standard (LEDES)** was developed in 1995 by the accountants at Price Waterhouse and a consortium of time and billing software developers to streamline legal billing by using a simplified system of standard codes. LEDES is designed to improve accuracy and efficiency by ensuring electronic invoices are complete and can be imported directly into billing systems, without manual entry.

NOTE: The preferred format of law firms

Over the years, many file formats were developed. However, LEDES 1998B is the only format MR9 supports. LEDES 1998B was adopted in 1998, and it is by far the more commonly used LEDES format. It lacks some flexibility, having a rigid structure. Another disadvantage of LEDES 1998B is that invoice-level data is repeated on every line item even though it is only needed once, as it does not vary per line. Nonetheless, law firms prefer it for its simplicity and familiarity.

Reference

- Electronic billing

Step-by-step instructions

- Exporting invoices in LEDES format

UTBMS codes

LEDES employs a coding system known as UTBMS. The **Uniform Task Based Management System (UTBMS)** was co-developed in 1995 by the American Bar Association (ABA), American Corporate Counsel Association (ACCA) and Price Waterhouse in an effort to standardize billing procedures and practices by law firms. This method of work product classification provides unique billing codes and matching category descriptions that are intended for use in detailed client billings.

UTBMS coding is broken into 3 components:

- **Task Code**
  Describes the task performed. For example L330 is used for depositions.
- **Activity Code**
  Describes the actual work performed by the timekeeper. For example A109 is used for appearing/attending.
- **Expense Code**
  Describes the expense submitted. For example E107 is used for delivery services.

Reference

- Electronic billing
- LEDES format
- ABA Litigation Code Set

Step-by-step instructions

- Exporting invoices in LEDES format
- Entering UTBMS codes for service items

Finding new clients

Find firms or contacts added during a particular time period. Review each new client's details to check for errors. Print envelopes or labels for sending welcome messages.

1. Select client type

1. **Inquiry > Marketing Inquiry**
2. To search for:
   - **New firms** – Leave **Category** as Firm, the default.
   - **New contacts** – Select Contacts in **Category** dropdown.
3. Leave **Type** as New, the default.

2. Update required information

***Entered From/*Entered To** *(required)* – Default is current year to date. To view new clients within a different time period, change the date range in Date Navigator.

3. Restrict results

- **Exclude 'Do not attempt marketing'**

  Default is No. To exclude clients who do not want you marketing to them from your search results, slide to Yes.

- **Notification Type**

  Contacts only

  Click to select one or more email categories to search by:

  - **Main** – Default. To view new contacts by their email address in the **General** pane of their MR9 listing.
  - **Accounting** – To view new contacts by the email address designated as the address to send invoices, statements, and other accounting related emails in the **Notification Email** pane of their MR9 listing.
  - **Order** – To view new contacts by the email address designated as the address to send emails about orders in the **Notification Email** pane of their MR9 listing.
  - **Repository** – To view new contacts by the email address designated as the address to send emails related to repository files in the **Notification Email** pane of their MR9 listing.

See Entering general contact information and Managing notification emails.

4. **View clients & print envelopes/labels**

   Click . All new clients that meet the search criteria appear in the results pane.

   - **To view/update a client's details,** click their hyperlinked **Firm Name/Contact** listing. See Updating firms or Updating contacts.
   - **To print envelopes/labels:**
     1. Check the box(es) of client(s) to select them.
     2. Click **Print Envelopes and Labels.** See Printing envelopes and labels.

   NOTE: Save the results

   To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Results pane

Step-by-step instructions

- Knowing your market
- Know who has stopped calling
- Finding most-scheduled clients
- Finding non-invoiced clients
- Finding highest-invoiced clients
- Entering general contact information
- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results

Know who has stopped calling

How many clients does your firm lose every year? With churn increasing and customer loyalty fading, winning back and keeping lost clients has never been more critical. According to a marketing study, your chances of winning back a former client are statistically two to four times higher than landing a new one.

Clients defect for different reasons, and some clients, frankly, aren't worth winning back. Careful evaluation and categorization let you select the most valuable clients to target, then develop individualized strategies to win back each type of client. Use MR9 to generate your list of lost clients, so you can target your marketing to them.

1. Select client type

1. **Inquiry > Marketing Inquiry**
2. To search for:
   - **Inactive firms** – Leave **Category** as Firm, the default.
   - **Inactive contacts** – Select Contacts in **Category** dropdown.
3. Select No Order in **Type** dropdown.

2. Update required information

***Part Order Date From/*Part Order Date To** *(required)* default is current year to date. To view clients within a different time period, change the date range in Date Navigator.

3. Restrict results

- **Exclude 'Do not attempt marketing'**

  Default is No. To exclude clients who do not want you marketing to them from your search results, slide to Yes.

- **Business Units**

  Default is ALL. Click to restrict the search to specific profit centers. See Lookup panel.

- **Notification Type**

  Contacts only

  Click to select one or more email categories to search by:

  - **Main** – Default. To view contacts by their email address in the **General** pane of their MR9 listing.

- **Accounting** – To view contacts by the email address designated as the address to send invoices, statements, and other accounting related emails in the **Notification Email** pane of their MR9 listing.
- **Order** – To view contacts by the email address designated as the address to send emails about orders in the **Notification Email** pane of their MR9 listing.
- **Repository** – To view contacts by the email address designated as the address to send emails related to repository files in the **Notification Email** pane of their MR9 listing.

See Entering general contact information and Managing notification emails.

4. ## View clients & print envelopes/labels

Click . All clients that meet the search criteria appear in the results pane.

- **To view/update a client's details,** click their hyperlinked **Firm Name/Contact** listing. See Updating firms or Updating contacts.
- **To print envelopes/labels:**
  1. Check the box(es) of client(s) to select them.
  2. Click **Print Envelopes and Labels.** See Printing envelopes and labels.

NOTE: Save the results

To export and save the results, click and select an export file type. See Exporting & printing results.

TIP: Use tags to categorize lost clients

Categorize lost clients with tags in their listings to help you when developing a marketing strategy for winning them back. Here are some suggested tags:

- Lost – Intentionally pushed away
- Lost – Unintentionally pushed away
- Lost – Pulled away
- Lost – Bought away
- Lost – Moved away
- Lost – Variety seeker

See Organizing with tags.

Reference

- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Knowing your market
- Finding new clients
- Finding most active clients
- Finding non-invoiced clients
- Finding highest-invoiced clients
- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results
- Organizing with tags

Finding most active clients

Find clients that had the most orders during a particular time period. This is a good way to know who your good clients are, and generate holiday card/thank you gift lists.

1. Select client type

1. **Inquiry > Marketing Inquiry**
2. To search for:
   - **Firms** – Leave **Category** as Firm, the default.
   - **Contacts** – Select Contacts in **Category** dropdown.
3. Select Top N Orders in **Type** dropdown.

2. Update required information

***Part Order Date From/*Part Order Date To** *(required)* – Default is current year to date. To view clients within a different time period, change the date range in Date Navigator.

3. Restrict results

With Top N Order selected in **Type,** use the additional search filters to narrow the results returned, if desired:

- **Top N**
  Default is 100 clients. To search for a different amount of clients, update the number in this field.
- **Exclude 'Do not attempt marketing'**
  Default is No. To exclude clients who do not want you marketing to them from your search results, slide to Yes.
- **Business Units**
  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to orders tied to specific BUs. See Lookup panel.
- **Notification Type**
  Contacts only
  Click to select one or more email categories to search by:
  - **Main** – Default. To view contacts by their email address in the **General** pane of their MR9 listing.

- **Accounting** – To view contacts by the email address designated as the address to send invoices, statements, and other accounting related emails in the **Notification Email** pane of their MR9 listing.
- **Order** – To view contacts by the email address designated as the address to send emails about orders in the **Notification Email** pane of their MR9 listing.
- **Repository** – To view contacts by the email address designated as the address to send emails related to repository files in the **Notification Email** pane of their MR9 listing.

See Entering general contact information and Managing notification emails.

4. ## View clients & print envelopes/labels

Click . All clients that meet the search criteria appear in the results pane.

- **To view/update a client's details,** click their hyperlinked **Firm Name/Contact** listing. See Updating firms or Updating contacts.
- **To print envelopes/labels:**
  1. Check the box(es) of client(s) to select them.
  2. Click **Print Envelopes and Labels.** See Printing envelopes and labels.

NOTE: Save the results

To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Business Units
- Results pane

Step-by-step instructions

- Knowing your market
- Finding new clients
- Know who has stopped calling
- Finding non-invoiced clients
- Finding highest-invoiced clients
- Managing notification emails
- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results

Finding non-invoiced clients

Find clients that had no billed orders during a particular time period.

1. Select client type

1. **Inquiry > Marketing Inquiry**
2. To search for:

   Firms – Leave **Category** as Firm, the default.

   Contacts – Select Contacts in **Category** dropdown.
3. Select No Revenue in **Type** dropdown.

2. Update required information

***Invoice Post Date From/*Invoice Post Date To** *(required)* default is current year to date. To view clients within a different time period, change date range in Date Navigator.

3. Restrict results

- **Exclude 'Do not attempt marketing'**

  Default is No. To exclude clients who do not want you marketing to them from your search results, slide to Yes.

- **Business Units**

  Default is ALL. Click to restrict the search to specific profit centers. See Lookup panel.

- **Notification Type**

  Contacts only

  Click to select one or more email categories to search by:

  - **Main** – Default. To view contacts by their email address in the **General** pane of their MR9 listing.
  - **Accounting** – To view contacts by the email address designated as the address to send invoices, statements, and other accounting related emails in the **Notification Email** pane of their MR9 listing.
  - **Order** – To view contacts by the email address designated as the address to send emails about orders in the **Notification Email** pane of their MR9 listing.

- **Repository** – To view contacts by the email address designated as the address to send emails related to repository files in the **Notification Email** pane of their MR9 listing.

See Entering general contact information and Managing notification emails.

4. ## View clients & print envelopes/labels

Click . All clients that meet the search criteria appear in the results pane.

- **To view/update a client's details,** click their hyperlinked **Firm Name/Contact** listing. See Updating firms or Updating contacts.
- **To print envelopes/labels:**
  1. Check the box(es) of client(s) to select them.
  2. Click **Print Envelopes and Labels.** See Printing envelopes and labels.

NOTE: Save the results

To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Business Units
- Results pane

Step-by-step instructions

- Knowing your market
- Finding new clients
- Know who has stopped calling
- Finding most-scheduled clients
- Finding highest-invoiced clients
- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results

Finding highest-invoiced clients

Find clients that were billed the most during a particular time period.

1. Select client type

1. **Inquiry > Marketing Inquiry**
2. To search for:
   - **Firms:** Leave **Category** as Firm, the default.
   - **Contacts:** Select Contacts in **Category** dropdown.
3. Select Top N Revenue in **Type** dropdown.

2. Update required information

***Invoice Post Date From/*Invoice Post Date To** *(required)* default is current year to date. To view clients within a different time period, change the date range in Date Navigator.

3. Restrict results

With Top N Revenue selected in **Type,** use the additional search filters to narrow the results returned, if desired:

- **Top N**
  Default is 100 clients. To search for a different amount of clients, update the number in this field.
- **Exclude Copies**
  Default is No. If you don't want to include invoices for copies in your search results, slide to Yes.
- **Exclude 'Do not attempt marketing'**
  Default is No. To exclude clients who do not want you marketing to them from your search results, slide to Yes.
- **Business Units**
  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to orders tied to specific BUs. See Lookup panel.
- **Notification Type**
  Contacts only

Click to select one or more email categories to search by:

- **Main** – Default. To view contacts by their email address in the **General** pane of their MR9 listing.
- **Accounting** – To view contacts by the email address designated as the address to send invoices, statements, and other accounting related emails in the **Notification Email** pane of their MR9 listing.
- **Order** – To view contacts by the email address designated as the address to send emails about orders in the **Notification Email** pane of their MR9 listing.
- **Repository** – To view contacts by the email address designated as the address to send emails related to repository files in the **Notification Email** pane of their MR9 listing.

See Entering general contact information and Managing notification emails.

4. ## View clients & print envelopes/labels

Click . All clients that meet the search criteria appear in the results pane.

- **To view/update a client's details,** click their hyperlinked **Firm Name/Contact** listing. See Updating firms or Updating contacts.
- **To print envelopes/labels:**
  1. Check the box(es) of client(s) to select them.
  2. Click **Print Envelopes and Labels.** See Printing envelopes and labels.

NOTE: Save the results

To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Business Units
- Results pane

Step-by-step instructions

- Knowing your market
- Finding new clients
- Know who has stopped calling

- Finding most active clients
- Finding non-invoiced clients
- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results

Entering simple payments (one check per invoice)

If you receive a check or other payment that covers a single invoice, enter the payment and apply it quickly to the outstanding invoice.

Continued from Entering payments.

1. Find invoice

1. After selecting **New > One Check One Invoice** in the Receive Payments window, the New Payment window opens. **Lookup By** is Invoice No. by default. To find an invoice by:

   - **Invoice number** – Enter the number of the invoice you want to apply the payment to in the field.
   - **Order and part number** – Select Order & Part No. in the **Lookup By** dropdown, then enter the number of the invoiced order and part (no need to include leading zeroes) you want to apply the payment to in the fields *(both are required).*

   TIP: Use multi-invoice option if you don't know the invoice/order number

   If you don't have the invoice or order and part number handy, you can use the multiple invoice payment option. When you enter the payment information, it will list all the outstanding invoices for the entered client, and you can select the invoice there. See Entering payment covering multiple invoices.

2. Click .

3. If you selected **Lookup By:**

   - **Invoice No.** – MR9 automatically fills in the invoice details in the **Invoice Info** pane.
   - **Order & Part No.** – The **Invoices** panel opens with any invoices associated with the order listed. Click the hyperlinked invoice number that the payment is for, and MR9 automatically fills in the invoice details in the **Invoice Info** pane.

   The fields in the **Invoice Info** pane are not editable, except you can click any active to view and edit details about the related client. See Updating firms and Updating contacts.

   NOTE: COD invoices must be posted before applying payments

   If you receive payment for a COD invoice, you must first post the invoice then you can apply the payment. See Working with COD invoices.

2. Enter payment

1. In the **Payment** pane, enter or make selections:

   - **Payment Type**

     - **Check** – Default. You can change the default payment method in Lists > Accounting.
     - **Online Payment** – For payments through MR Connect. (Must first set up an account with an MR9-approved payment processing company — such as PayPal — and enter your account information in Connect Preferences > Contact-Account Activity.)
     - **Retainer** – If using a retainer, see Applying retainers.

     TIP: Customize payment types for your clients

     You can add other payment methods your clients use, such as Cash, Credit Card or Electronic Transfer. (Payment Types and default are set in Lists > Accounting. You can also delete or hide payment types in the list — except the default method, Online Payment, and Retainer.)

     NOTE: Change payment type before posting

     You can change the **Payment Type** for any transaction, except retainers, until you post the payment.

   - ***Transaction Date**

     Required. Default is today. Change date, if desired, in Date Navigator.

   - **Payer**

     Usually the firm that was sent the invoice (Bill To). Click the to select the firm paying the invoice. See Looking up firms. If the invoice was paid by a third party which is not in your database and you don't want to add them to MR9, leave the field blank and enter the name of the third party in the **Made By** field.

   - **Retainer Amount**

     Any retainer in the Bill To firm's account appears in this uneditable field. If you want to use the retainer, see Applying retainers.

   - **Check No.**

     If payment is by check, enter the check number.

   - ***Amount**

     Required. Default is the invoice amount. If payment amount is different, enter the payment amount.

- **Check Date**

  If payment is by check, enter the actual date on the check.

- **Account No.**

  A payment credits the Accounts Receivable account. Select an account to be debited in the dropdown. The default is your Checking account. (Checking account is set in the Accounts pane of the business unit assigned to the related orders. See Selecting BU financial accounts.)

  NOTE: What are credits and debits?

  For an explanation of credits and debits and other basic accounting concepts, see Debits and credits.

- **Made By**

  Enter the issuer of the check — if different from the Bill To firm.

TIP: Fix received payment errors

If you discover an error in the **Check No., Check Date,** or **Made By** fields after posting a payment, you can fix it in Receivable Transaction Inquiry. See Searching for payment histories.

2. If there are any adjustments to make to how to credit the payment on the selected invoice, enter/edit the amounts in:

   - **Credit**
     Payment that reduces the balance of the invoice.

   - **Discount**
     Deduction that reduces the balance of the invoice. See Discount.

   - **Late Charge**
     One-time account service fee assessed on past-due invoices. If payment date is prior to the date late charges would start to accrue, this field is grayed out and uneditable.

   - **Finance Charge**
     Monthly service fee on past-due invoices. If payment date is prior to the date finance charges would start to accrue, this field is grayed out and uneditable.

     NOTE: Let MR9 calculate charges

     Late charge and finance charge amounts are automatically calculated using the percentages in the firm's MR9 listing. See Entering additional firm information. When an invoice becomes past due is calculated based on the days set in the business unit the related order is assigned to. See Entering BU preferences. The amounts appear in the **Invoice Info** pane of the New Payment window for you to copy and paste into the Payment pane.

- **Overpayment**
  Any excess payment amount that you will refund to client. See Overpayment.

- **Processing Fee**

  If you are paying the fee for the client when they are paying by credit card, enter the amount you will be charged for processing the transaction and deduct it from the **Credit** field. See Processing Fee.

- **Surcharge**

  To have the client who is paying by credit card also pay the credit card fee, enter the amount charged for processing the transaction. See Surcharge.

3. **Save & post payment**

   1. Click **Save >**

      - **Save & New** – To enter more single payments for single invoices.

      - **Save & Close** – When finished Entering simple payments (one check per invoice).

   2. Post payment(s). See Posting payments.

NOTE: Be sure to post transactions
All daily transactions (such as invoices, payments, credit memos, etc.) are temporary until they are posted (i.e., closed out). Once posted, they cannot be modified nor deleted. The daily registers and monthly journals use the post date (not the transaction date) to select and group transactions on the report.

Reference

- COD Invoices
- MR Connect
- PayPal
- Contact-Account Activity Preferences
- Retainer
- Lists > Accounting
- Date Navigator
- Business Units
- Discount
- Overpayment
- Processing Fee
- Surcharge
- Debits and credits

Step-by-step instructions

- Entering payments
- Entering payment covering multiple invoices
- Updating firms
- Updating contacts
- Working with COD invoices
- Applying retainers
- Looking up firms
- Selecting BU financial accounts
- Entering additional firm information
- Entering BU preferences
- Posting payments

Entering payments covering multiple invoices

Apply a payment to multiple outstanding invoices. MR9 can handle an unlimited number of invoices paid by one check or other type of payment.

Continued from Entering payments.

1. Enter payment

1. After selecting **New > One Check Multiple Invoices** in the Receive Payments window, the New Payment window opens. Enter or make selections:

   - **Payment Type**

     - **Check** – Default. You can change the default payment method in Lists > Accounting.
     - **Online Payment** – For payments through MR Connect. Must set up an account with an MR9-approved payment processing company (such as PayPal) and enter your account information in Connect Preferences > Contact-Account Activity.
     - **Retainer** – If using a retainer, see Applying retainers.

     TIP: Customize payment types for your clients

     You can add other payment methods your clients use — such as Cash, Credit Card or Electronic Transfer. (Payment Types and default are set in Lists > Accounting. You can also delete or hide payment types in the list — except the default method, Online Payment, and Retainer.)

     NOTE: Change payment type before posting

     You can change the **Payment Type** for any transaction, except retainers, until you post the payment.

   - ***Transaction Date**

     Required. When you entered the transaction. Default is today. Change date, if desired, in Date Navigator.

   - **Payer**

     Usually the firm that was sent the invoices (Bill To). Click the to select the firm paying the invoices. See Looking up firms. If the invoices were paid by a third party which is not in your database and you don't want to add them to MR9, leave the field blank and enter the name of the third party in the **Made By** field.

Retainer Amount

After selecting a Bill To firm in **Payer,** any retainer in the client's account appears in this uneditable field. If you want to use the retainer, see Applying retainers.

- **Check No.**

  If payment is by check, enter the check number.

- ***Amount**

  Required. The entire payment amount.

- **Check Date**

  If payment is by check, enter the actual date on the check.

- **Account No.**

  A payment credits the Accounts Receivable account. Select an account to be debited in the dropdown. The default is your Checking account. (Checking account is set in the Accounts pane of the business unit assigned to the related orders. See Selecting BU financial accounts.)

  #### NOTE: What are credits and debits?

  For an explanation of credits and debits and other basic accounting concepts, see Debits and credits.

- **Made By**

  Enter the issuer of the check, if different from the Bill To firm.

2. Click **Save.**

2. Apply payment & post

1. The **Apply Invoices** panel appears. To apply payment to invoices, see Applying payments to invoices.

2. To post payment(s), see Posting payments.

NOTE: Be sure to post transactions

All daily transactions (such as invoices, payments, credit memos, etc.) are temporary until they are posted (i.e., closed out). Once posted, they cannot be modified nor deleted. The daily registers and monthly journals use the post date (not the transaction date) to select and group transactions on the report.

Reference

- Lists > Accounting
- MR Connect
- PayPal

- Connect Preferences > Contact-Account Activity
- Retainer
- Date Navigator
- Business Units
- Debits and credits

Step-by-step instructions

- Entering payments
- Applying retainers
- Looking up firms
- Selecting BU financial accounts
- Applying payments to invoices
- Posting payments

Discount

When a client sends you a check that is slightly less than the current balance of an invoice, and you do not want to try to collect the difference, enter the difference as a **discount** on the posted invoice to make the invoice balance go down to zero.

Step-by-step instructions

- Entering payments
- Entering simple payments (one check per invoice)
- Applying payments to invoices

Overpayment

If a client sends you a check for more than is owed, the excess amount after you have applied the payment to invoices should be entered as an **overpayment**. MR9 posts all overpayments to the Refund account since they are liabilities to be refunded in the future.

NOTE: Overpayment vs. duplicate payment

Use the **Overpayment** field in Receive Payments when a check amount is more than what is owed. Use the **Duplicate Payment** option in Enter Other Transactions when you receive a check for an invoice that has already been paid. See Entering duplicate payments.

Reference

- Refund

Step-by-step instructions

- Entering payments
- Entering simple payments (one check per invoice)
- Applying payments to invoices
- Entering duplicate payments
- Recording refunds made

Processing Fee

Usage fees associated with processing credit card payments that were not included in an invoice's balance. To pass this expense along to clients, use Surcharge to enter fees you incur processing payments by credit card. When you process a credit card payment, a line item for the fee will appear on the current invoice to show it has been paid. Processing fees are automatically applied when clients use MR Connect to pay online via PayPal.

Reference

- Surcharge
- MR Connect

Step-by-step instructions

- Selecting BU financial accounts
- Entering payments

Surcharge

Surcharge, like Finance Charge, is a fee that was not included in an invoice's balance but is added to posted invoices while applying payments to invoices. You can use this option for the fees you incur processing payments by credit card. When you process a credit card payment, a line item for the fee will appear on the current invoice to show it has been paid.

Reference

- Finance Charges
- Processing Fee

Step-by-step instructions

- Selecting BU financial accounts
- Entering payments

Balancing transactions to post

If a payment is more than the outstanding balance(s), it is an unbalanced transaction and cannot be posted. You must balance out the payment with credits in the system before you can post the payment. You can view all unposted payments in the system or filter unposted payments to see only those you entered.

1. **Receivables > Receive Payments**
2. In the Receive Payments window, to:
   - **To see all unposted payments,** click .
   - **To see only payments you or someone else entered,** click next to the **Created By** field. See Looking up users.
3. All unposted payments that meet your search criteria are listed. Unbalanced transactions show the outstanding payment amount in the **Balance** column. Grand totals of the amounts paid and the amount unapplied to invoices (Balance) appear in the footer of the list. To:
   - **View which invoices a payment has been applied to,** click ▸. Any invoices already debited from the payment are listed below the payment.
   - **Export/print the list as a report,** click and select an export file type. See Exporting & printing results.
4. To balance a transaction that has an outstanding balance listed, click its:
   - Hyperlinked **Amount** or **> View** – To open the transaction in its View window. Then click **Edit** in the View Payment window header.
   - **> Edit** – To open the transaction in its Edit window.
5. In the Edit Payment window, any invoices that have already been selected to be paid with this transaction are listed in **Applied Invoice(s).**

   ### NOTE: Edit details, including payment type, before posting

   You can update some details in payments and change the **Payment Type** for any transaction (except retainers) in the Edit Payment window until you post the payment.
6. If you want to:
   - **Balance the transaction with a new invoice,** click in the **Applied Invoice(s)** pane header.

Correct a payment application, see Correcting payment applications.

7. In the **Apply Invoices** panel, all open invoices tied to the **Payer** firm listed in the Edit Payment window are listed.

8. Continue with instructions in Applying payments to invoices and Posting payments.

NOTE: If you can't edit a payment, delete it and start over
if a payment you entered has an error — such as the wrong amount or Payer — that cannot be edited, delete the payment then re-enter it. To delete a payment, click its **> Delete** in the Receive Payments window. In the popup that appears, click **Yes.**

Reference

- Debits and credits
- Lookup panel
- Retainer

Step-by-step instructions

- Looking up users
- Entering payments
- Applying retainers
- Exporting & printing results
- Correcting payment applications
- Applying payments to invoices
- Posting payments

Applying payments to invoices

After entering payments into MR9, apply those checks, other types of payments, and retainers to outstanding invoices. Adjust payments to handle discounts, overpayments, fees, and other charges before posting the payments.

Continued from Entering payment covering multiple invoices, Applying retainers, or Balancing transactions to post.

1. In the **Apply Invoices** panel, all open invoices for the Bill To firm selected in **Payer** are listed. If the list of open invoices is too long, or if you left **Payer** blank so no invoices are listed, enter information in one or more search fields, then click **Search:**

   - **Bill To Firm**
     To change the firm designated as paying the invoice(s), click ▽ **> Lookup Firm.** See Looking up firms.

   - **Invoice No.**
     Enter the entire invoice number.

   - **Order & Part No.**
     Enter the entire order number and part number (no need to include leading zeroes) in the two fields *(both are required if using this search option).*

   - **Invoice Amount**
     Enter a dollar amount range in the two fields.

   NOTE: COD invoices must be posted before applying payments

   COD invoices will not appear in the search results. You must first post the invoice then you can apply the payment. See Working with COD invoices.

2. Click the hyperlinked **Invoice No.** that you want to apply the payment/retainer to. A dropdown pane appears:

   - **If the check/retainer amount is the same as or less than the invoice balance,** the check/retainer balance appears in the **Credit** field.

   - **If the check/retainer amount is the more than the invoice balance,** the invoice balance appears in the **Credit** field. (If this is a retainer, the remaining retainer balance to be allocated will appear in **Balance** in the Edit Payment window.)

3. If there are any adjustments to make to how to credit the payment on the selected invoice, enter/edit the amounts in:

   - **Credit**
     Payment that reduces the balance of the invoice.

- **Discount**
  Deduction that reduces the balance of the invoice. See Discount.

- **Overpayment**
  Any excess payment amount that you will refund to client. See Overpayment.

- **Late Charge**
  One-time account service fee assessed on past-due invoices. If payment date is prior to the date late charges would start to accrue, this field is grayed out and uneditable.

- **Finance Charge**
  Monthly service fee on past-due invoices. If payment date is prior to the date finance charges would start to accrue, this field is grayed out and uneditable.

- **Processing Fee**

  If you are paying the fee for the client when they are paying by credit card, enter the amount you will be charged for processing the transaction and deduct it from the **Credit** field. If payment is by retainer, this field is grayed out and uneditable. See Processing Fee.

- **Surcharge**

  To have the client who is paying by credit card also pay the credit card fee, enter the amount charged for processing the transaction. See Surcharge.

4. Click **Apply.** If:

   - No firm was entered in the **Payer** field when entering the payment, a popup will appear asking if you want to use the selected invoice's Bill To firm as the Payer. Click **Yes** if you want to update the **Payer** field.

   - The invoice selected is less than the amount of the check/retainer, repeat steps 2–4 until you have applied all of the relevant invoices to the payment/retainer.

5. When the transaction balances or the invoice amount of the applied invoices is greater than the payment, the **Apply Invoices** panel closes and the paid invoices appear in the **Applied Invoice(s)** pane of the Edit Payment window. Or you can click **Close** in the **Apply Invoices** panel to return to the Edit Payment window without balancing the transaction. If you changed the Payer in the previous step, the Bill To firm's name appears in the **Payer** field.

6. In the Edit Payment window, click **Save >**

   - **Save & New** – To continue applying payments to invoices.

   - **Save & Close** – When finished applying payments.

7. When ready, post the transaction. See Posting payments.

NOTE: Be sure to post transactions

All daily transactions (such as invoices, payments, credit memos, etc.) are temporary until they are posted (i.e., closed out). Once posted, they cannot be modified nor deleted. The daily registers and monthly journals use the post date (not the transaction date) to select and group transactions on the report.

NOTE

Once a payment is recorded, the check amount and the payment type cannot be edited. You must delete the payment first, then re-enter it. To delete a payment, select it, then choose Delete.

Reference

- Retainer
- COD Invoices
- MR Connect
- Lists > Accounting
- Discount
- Overpayment
- Processing Fee
- Surcharge
- Debits and credits

Step-by-step instructions

- Entering payment covering multiple invoices
- Applying retainers
- Balancing transactions to post
- Looking up firms
- Working with COD invoices
- Posting payments

Correcting payment applications

If you discover after recording a payment, that you should have applied it to a different invoice, or you failed to apply discounts, overpayments, late charges or other charges and fees, delete the incorrectly applied invoices from the payment and re-apply the payment.

Continued from Balancing transactions to post.

1. In the **Applied Invoice(s)** pane in the Edit Payment window, any invoices that have already been selected to be paid with this transaction are listed in **Applied Invoice(s).**
2. To delete an incorrectly applied invoice from the payment check the invoice's box, then click .
3. Click **Yes** in the popup that appears.
4. Click .
5. In the **Apply Invoices** panel, all open invoices tied to the **Payer** firm in the Edit Payment window are listed — including the one you just deleted from the **Applied Invoice(s)** pane.
6. Continue with instructions in Applying payments to invoices and Posting payments.

Reference

- Discount
- Overpayment

Step-by-step instructions

- Balancing transactions to post
- Applying payments to invoices
- Posting payments

Posting payments

After entering a payment and applying it to outstanding invoices, the final step is to post the payments. All daily transactions (such as invoices, payments, credit memos, etc.) are temporary until they are posted (i.e., closed out). Once posted, they cannot be modified nor deleted. The daily registers and monthly journals use the post date (not the transaction date) to select and group transactions on the report.

Continued from Entering simple payments (one check per invoice), Entering payments covering multiple invoices, Applying retainers, Balancing transactions to post or Applying payments to invoices.

1. After applying the payment to invoices, the check/retainer appears in the Receive Payments window with its **Balance** updated. Click its:
   - ▸ – To view the invoice(s) debited from the payment in a pane that opens below the payment listing.
   - **> View** – To open the payment in its View window. Or click the hyperlinked **Amount.**
   - **> Edit** – To open the payment in its Edit window. Or click the hyperlinked **Amount** then click **Edit** in the View window.
   - **> Delete** – To delete the payment. Or click the hyperlinked **Amount** then click **Delete** in the View window. In the popup that appears, click **Yes.**
2. To post the transaction:
   - Check the payment/retainer's box in the Receive Payments results grid.
   - Or continue recording all other payments, then check the box in the header to select all to post at once.
3. Click **Post.** MR9 processes the transaction(s):
   - If the payment/retainer equals the invoice amount(s) it was applied to or the payment/retainer is less than the invoice(s), the transaction posts and disappears from the Receive Payments window. Click **OK** in the **Operation Successful** popup that appears.
   - If the payment/retainer is more than the invoice balance(s), a popup appears alerting you that it is an unbalanced transaction and cannot be posted. Click **OK.** The payment/retainer is applied to the invoice(s) and the remaining **Balance** appears in the Receive Payments window. The transaction cannot be posted until it is balanced. See Balancing transactions to post.

TIP: Acknowledge client payments

After posting payments, use Send Payment Receipts to email clients receipts for the payments. See Sending receipts for payments.

NOTE: Post other types of transactions

In addition to posting invoice payments as you enter them or in batches, you can post other transactions, such as credit memos, duplicate payments, and voids as you enter them or in batches in the Enter Other Transactions function. See Viewing and posting other transactions.

Reference

- Daily Register
- Monthly Journals
- Retainer
- Overpayment
- Debits and credits
- Send Payment Receipts
- Enter Other Transactions

Step-by-step instructions

- Entering payments
- Applying retainers
- Balancing transactions to post
- Entering simple payments (one check per invoice)
- Entering payments covering multiple invoices
- Applying payments to invoices
- Sending receipts for payments
- Viewing and posting other transactions

Debit Memo

A **debit memo** increases the balance of an invoice.

Step-by-step instructions

- Issuing debit memos

Issuing credit memos

If you need to correct a posted invoice to reduce the balance on the invoice, use a credit memo.

Continued from Viewing and posting other transactions.

1. After clicking **New > Credit Memo** in the Enter Other Transactions window, the New Credit Memo window appears. In the New Credit Memo window's **Lookup Invoice No.,** type the invoice number and click .
2. Basic information about the invoice and its related client appear in the **Invoice Info** pane. All fields in this pane are uneditable, except you can click any active to view and edit details about the related client.
3. Enter the following information in the **Credit Memo** pane:
   - ***Transaction Date**

     Required. The credit date. Default is today's date. To change, see Date Navigator.
   - ***Amount**

     Required. The credit amount. It cannot be greater than the current balance, which appears in the **Invoice Info** pane under **Balance.**
   - **Account No.**

     A credit memo *credits* the Accounts Receivable account. If the default account to be *debited* that appears here is wrong, select a different account in the dropdown. (Accounts are set up in Chart of Accounts and defaults selected in business units. See Selecting BU financial accounts.)
   - **Debit Sales Rep Commission**

     By default, sales commissions are not decreased when a credit memo is applied. Slide to Yes to show this credit memo on the Sales Commission Report for the sales rep so that you can adjust (decrease) the sales rep's commission.
   - **Remarks**

     Reason for the credit.
4. Click **Save >**
   - **Save & New:** To create another credit memo.
   - **Save & Close:** If you have no more credit memos to add at this time.
5. The credit memo appears in the Enter Other Transactions window, along with any other unposted transactions. Check the box and click **Post** to post the transaction(s).

6. MR9 posts the transaction(s). When finished, click **OK** in the popup that appears.

NOTE: Exceptions to credit memos

There are a couple of instances when you cannot apply a credit memo to an invoice:

- If an unposted payment or other transaction exists for the invoice you want to reduce the balance of, you must post the existing unposted transaction first. See Batch-posting invoices.
- If the invoice is already paid in full, you cannot issue a credit memo. If you want to cancel an entire invoice, do not issue a credit memo. Void the invoice instead. See Voiding invoices.

Reference

- Credit Memo
- Date Navigator
- Debits and credits
- Chart of Accounts
- Sales Rep

Step-by-step instructions

- Viewing and posting other transactions
- Selecting BU financial accounts
- Batch-posting invoices
- Voiding invoices

Issuing debit memos

If a client bounces a check or you want to reverse a previously issued credit memo, use a debit memo to increase the invoice balance.

Continued from Viewing and posting other transactions.

1. After clicking **New > Debit Memo** in the Enter Other Transactions window, the New Debit Memo window appears. In the New Debit Memo window's **Lookup Invoice No.,** type the invoice number and click .
2. Basic information about the invoice and its related client appear in the **Invoice Info** pane. All fields in this pane are uneditable, except you can click any active to view and edit details about the related client.
3. Enter the following information in the **Debit Memo** pane:
   - ***Transaction Date**

     Required. The debit date. Default is today's date. To change, see Date Navigator.
   - ***Amount**

     Required. Debit amount. It cannot be greater than the difference between the invoice amount and the current balance, which appear in the **Invoice Info** pane under **Invoice Amount** and **Balance.**
   - **Debit Late Charge**

     The late charge (one-time account service fee assessed on past-due invoices) amount that is being debited. (If field is grayed out, no late charge payment was previously paid.)
   - **Debit Finance Charge**

     The finance charge (monthly service fee assessed on past-due invoices) amount that is being debited. (If field is grayed out, no finance charge payment was previously paid.)
   - **Account No.**

     A debit memo *debits* the Accounts Receivable account. If the default account to be *credited* that appears here is wrong, select a different account in the dropdown. (Accounts are set up in Chart of Accounts and defaults selected in business units. See Selecting BU financial accounts.)
   - **Credit Sales Rep Commission**

     By default, sales commissions are not affected when a debit memo is applied. Slide to Yes to show this debit memo on the Sales Commission Report for the sales rep so that you can adjust (increase) the sales rep's commission.

- **Remarks**
  Reason for the debit. The default is "Returned check."

4. Click **Save >**

   - **Save & New:** To create another debit memo.
   - **Save & Close:** If you have no more debit memos to add at this time.

5. The debit memo appears in the Enter Other Transactions window, along with any other unposted transactions. Check the box and click **Post** to post the transaction(s).
6. MR9 posts the transaction(s). When finished, click **OK** in the popup that appears.

NOTE: Exceptions to debit memos

There are a couple of instances when you cannot apply a debit memo to an invoice:

- If an unposted payment or other transaction exists for the invoice you want to increase the balance of, you must post the existing unposted transaction first. See Batch-posting invoices.
- If the invoice has a full balance, you cannot issue a debit memo.

Reference

- Debit Memo
- Date Navigator
- Debits and credits
- Chart of Accounts
- Sales Rep
- Post Invoices

Step-by-step instructions

- Viewing and posting other transactions
- Selecting BU financial accounts
- Batch-posting invoices

Duplicate Payment

When you receive a payment for an invoice that has already been paid, enter it as a duplicate payment. A **duplicate payment** is a liability on your books even though you deposit the funds into your checking account. MR9 posts it as a liability to the Refund account.

Reference

- Refund

Step-by-step instructions

- Entering duplicate payments
- Recording refunds made

Entering duplicate payments

If you receive a check for a single invoice or multiple invoices that have been paid already, and you want to deposit the check (rather than return it); enter it as a duplicate payment in MR9 to record the payment.

1. **Receivables > Enter Other Transactions**
2. In Enter Other Transactions window, click **New > Duplicate Payment >**
   - **One Check One Invoice** – If you are refunding a single invoice. See Entering single duplicate payments & refunds.
   - **One Check Multiple Invoices** – If you refunding more than one invoice for a single client. See Entering duplicate payments & refunds covering multiple invoices.

NOTE: Record refunds too

When you issue a refund for a duplicate payment, be sure to note the refund in MR9, so your Payment Transactions log is accurate. See Recording refunds made.

Reference

- Duplicate Payment
- Refund

Step-by-step instructions

- Entering single duplicate payments & refunds
- Entering duplicate payments & refunds covering multiple invoices
- Recording refunds made

Refund

If a client sends you an overpayment or a duplicate payment for an invoice, you reimburse them through your accounting system, then enter the **refund** in MR9 so that the Payment Transactions log is complete.

Reference

- Overpayment
- Duplicate Payment

Step-by-step instructions

- Recording refunds made

Recording refunds made

Since MR9 is not a general accounting system, you write refund checks for duplicate payments or overpayments (including any remaining retainer funds) using your accounting system such as *QuickBooks.* However, you should still record refund transactions in MR9 so that the Payment Transactions log is complete.

1. **Receivables > Enter Other Transactions**
2. In Enter Other Transactions window, click **New > Refund >**
   - **One Check One Invoice** – If you are refunding a single invoice. See Entering single duplicate payments & refunds.
   - **One Check Multiple Invoices** – If you refunding more than one invoice for a single client. See Entering duplicate payments & refunds covering multiple invoices.

Reference

- Duplicate Payment
- Overpayment
- Retainer
- Refund

Step-by-step instructions

- Entering single duplicate payments & refunds
- Entering duplicate payments & refunds covering multiple invoices

Entering single duplicate payments & refunds

If you receive a duplicate payment or are making a refund that covers a single invoice, enter the transaction and apply it quickly to the outstanding invoice.

Continued from Entering duplicate payments or Recording refunds made.

1. After selecting One Check One Invoice, the New Duplicate Payment/New Refund window opens. Type the invoice number in **Lookup Invoice No.** and click .
2. Basic information about the invoice and its related client appear in the **Invoice Info** pane. All fields in this pane are uneditable, except you can click any active to view and edit details about the related client.
3. Enter the following information in the **Duplicate Payment/Refund** pane:
   - ***Transaction Date**

     Required. The duplicate payment/refund date. Default is today.
   - ***Amount**

     Required. The duplicate payment/refund amount. Default is the invoice amount.
   - **Account No.**
     - **A duplicate payment debits the Checking account.** Select an account to be credited in the dropdown.
     - **A refund credits the Checking account.** Select an account to be debited in the dropdown.
   - **Check No.**

     Your check number.
   - **Check Date**

     The actual date on your check.
   - **Remarks**

     Enter information about the duplicate payment/reason for the refund. If this is a duplicate payment, "Duplicate payment by" appears by default. Fill in the rest by entering the issuer of the check and other comments.
4. Click **Save >**
   - **Save & New:** To enter another duplicate payment/refund.
   - **Save & Close:** If you have no more duplicate payments/refunds to add at this time.

5. The duplicate payment(s)/refund(s) appear in the Enter Other Transactions window, along with any other unposted transactions. Check the box(es) and click **Post** to post the transaction(s).

6. MR9 posts the transaction(s). When finished, click **OK** in the popup that appears.

Reference

- Date Navigator
- Debits and credits
- Chart of Accounts

Step-by-step instructions

- Viewing and posting other transactions
- Entering duplicate payments
- Applying retainers
- Selecting BU financial accounts

Entering duplicate payments & refunds covering multiple invoices

Apply a duplicate payment or refund to multiple invoices. MR9 can handle an unlimited number of invoices paid by one check or other type of payment.

Continued from Entering duplicate payments or Recording refunds made.

1. After selecting One Check Multiple Invoices, the New Duplicate Payment/New Refund window opens. In the ***Invoices** pane header, click
2. In the **New Invoice** panel, enter one of the relevant invoices in **Lookup Invoice No.** and click .
3. Basic information about the invoice and its related client appear in the **Invoice Info** pane. All fields in this panel are uneditable.
4. Click **Save >**
   - **Save & New:** To enter another invoice to apply to the duplicate payment/refund.
   - **Save & Close:** If you have no more invoices to add at this time.

   The invoice appears in the ***Invoices** pane. The **Grand Total** amount at the bottom of the pane automatically updates as you enter more invoices.
5. Enter the following information in the **Duplicate Payment/Refund** pane:
   - ***Transaction Date**

     Required. The duplicate payment/refund date. Default is today.
   - ***Amount**

     Required. The total amount of the duplicate payment/refund amount.
   - **Account No.**
     - **A duplicate payment debits the Checking account.** Select an account to be credited in the dropdown.
     - **A refund credits the Checking account.** Select an account to be debited in the dropdown.
   - **Check No.**

     Your check number.
   - **Check Date**

     The actual date on your check.

- **Remarks**
  Enter information about the duplicate payment/reason for the refund. If this is a duplicate payment, "Duplicate payment by" appears by default. Fill in the rest by entering the issuer of the check and other comments.

6. Click **Save >**

   - **Save & New:** To enter another duplicate payment/refund covering multiple invoices.
   - **Save & Close:** If you have no more duplicate payments/refunds to add at this time.

7. The duplicate payment(s)/refund(s) appear in the Enter Other Transactions window, along with any other unposted transactions. Check the box(es) and click **Post** to post the transaction(s).

8. MR9 posts the transaction(s). When finished, click **OK** in the popup that appears.

Reference

- Date Navigator
- Debits and credits
- Chart of Accounts

Step-by-step instructions

- Entering duplicate payments
- Recording refunds made

Miscellanous Receipt

If you receive a check from a customer that does not reference an invoice, including the check for a retainer (upfront deposit), you can record it as a **miscellaneous receipt** for tracking purposes.

Reference

- Retainer

Step-by-step instructions

- Entering miscellaneous receipts

Entering miscellaneous receipts

Enter retainers and other payments that are not tied to an invoice as miscellaneous receipts.

Continued from Viewing and posting other transactions.

1. After clicking **New > Misc. Receipt** in the Enter Other Transactions window, the New Misc. Receipt window appears. Enter the following information in the New Misc. Receipt window:

   - ***Transaction Date**

     Required. Date you received the receipt. Default is today's date. To change, see Date Navigator.

   - ***Amount**

     Required. Miscellaneous receipt amount.

   - **Account No.**

     A miscellaneous receipt *debits* the Checking account. If the default account to be *credited* that appears here is wrong, select a different account in the dropdown. (Accounts are set up in Chart of Accounts and defaults selected in business units. See Selecting BU financial accounts.)

   - **Check No.**

     If paid by check, enter the check number.

   - **Check Date**

     If paid by check, enter the actual date on the check.

   - **Order No.**

     Order number associated with the payment, if applicable.

   - **Business Unit**

     Select your company profit center associated with the payment in the dropdown. See Business Units.

   - **Remarks**

     Reason for the receipt.

2. Click **Save >**

   - **Save & New:** To enter another miscellaneous receipt.
   - **Save & Close:** If you have no more miscellaneous receipts to add at this time.

3. The miscellaneous receipt appears in the Enter Other Transactions window, along with any other unposted transactions. Check the box and click **Post** to post the transaction(s).
4. MR9 posts the transaction(s). When finished, click **OK** in the popup that appears.

Reference

- Retainer
- Date Navigator
- Debits and credits
- Chart of Accounts
- Business Units

Step-by-step instructions

- Viewing and posting other transactions
- Selecting BU financial accounts

Void

Once an invoice is posted, it cannot be canceled or deleted. Instead, you must render the invoice **void,** so it has no value but you still have its historical data.

Reference

- Post Invoices

Step-by-step instructions

- Voiding invoices

Voiding invoices

If a customer returns a product, its invoice must be voided. If an order is billed incorrectly, the invoice(s) should be voided before the order is billed again.

Continued from Viewing and posting other transactions.

1. After clicking **New > Void** in the Enter Other Transactions window, the New Void window appears. In the New Void window's **Lookup Invoice No.,** type the invoice number and click .
2. Basic information about the invoice and its related client appear in the **Invoice Info** pane. All fields in this pane are uneditable, except you can click any active to view and edit details about the related client.
3. In the **Void** pane, enter the following information:
   - **Transaction Date**

     The default is today's date and cannot be edited.
   - **Amount**

     The voided amount is the invoice total and cannot be edited.
   - **Not to void Sales Rep Commission**

     By default, the sales rep commission will also be voided. Slide to Yes if you do not want to void the commission.
   - **Remarks**

     Reason for the void.
4. Click **Save >**
   - **Save & New:** To void another invoice.
   - **Save & Close:** If you have no more invoices to void at this time.
5. The voided invoice appears in the Enter Other Transactions window, along with any other unposted transactions. Check the box and click **Post** to post the transaction.
6. MR9 posts the transaction and removes it from the Enter Other Transactions results. Click **OK** in the popup that appears.

NOTE: Exception to voids

You cannot void an invoice if an unposted payment or other transaction exists for the invoice you want to void. You must post the existing unposted transaction first. See Batch-posting invoices.

Reference

- Void
- Sales Rep

Step-by-step instructions

- Viewing and posting other transactions
- Batch-posting invoices

Write-off

If an invoice becomes uncollectible, write it off as a bad debt.

Step-by-step instructions

- Writing off uncollectible invoices

Writing off uncollectible invoices

If an invoice becomes uncollectible, write it off as a bad debt.

Continued from Viewing and posting other transactions.

1. After clicking **New > Write-off** in the Enter Other Transactions window, the New Write-off window appears. In the New Write-off window's **Lookup Invoice No.,** type the invoice number and click .
2. Basic information about the invoice and its related client appear in the **Invoice Info** pane. All fields in this pane are uneditable, except you can click any active to view and edit details about the related client.
3. Enter the following information in the **Write-off** pane:
   - **Transaction Date**

     The default is today's date and cannot be edited.
   - **Amount**

     The write-off amount is the current balance and cannot be edited.
   - **Account No.**

     A write-off *credits* the Accounts Receivable account. If the default account to be *debited* that appears here is wrong, select a different account in the dropdown. (Accounts are set up in Chart of Accounts and defaults selected in business units. See Selecting BU financial accounts.)
   - **Void Sales Rep Commission**

     By default, the sales rep commission will not be voided. Slide to Yes to void the commission.
   - **Remarks**

     Reason for the write-off. The default is "Uncollectible bad debt."
4. Click **Save >**
   - **Save & New:** To write off another invoice.
   - **Save & Close:** If you have no more write-offs to add at this time.
5. The written-off invoice appears in the Enter Other Transactions window, along with any other unposted transactions. Check the box and click **Post** to post the transaction(s).
6. MR9 posts the transaction(s). When finished, click **OK** in the popup that appears.

NOTE: Exception to write-offs

You cannot write off an invoice if an unposted payment or other transaction exists for the invoice you want to write off. You must post the existing unposted transaction first. See Batch-posting invoices.

Reference

- Write Off
- Debits and credits
- Chart of Accounts
- Sales Rep
- Post Invoices

Step-by-step instructions

- Viewing and posting other transactions
- Selecting BU financial accounts
- Batch-posting invoices

Generating finance charges automatically

If you have set up finance charge rates in clients' firm records, you can have MR9 automatically generate a finance charge for each invoice that is more than 30 days old, if it has been more than 28 days since you performed this task last. MR9 will generate the charge by multiplying the invoice's current balance by the firm's finance charge percentage rate, if it has been more than 28 days since you performed this task last.

Continued from Generating finance charges.

1. In the Generate Finance Charges by Auto window, all firms with invoices more than 30 days old appear. Make selections in the **Search By** pane if you want to limit the search:

   - **Bill To Firm**

     To assess finance charges for a particular client, click . See Looking up firms. Otherwise, leave blank to generate finance charges for all clients.

   - **Invoice No.**

     Enter an invoice number to generate charges for a single invoice.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

2. Click . MR9 lists all of the open invoices that meet the specified search condition(s).

3. To assess finance charges for:

   - **All invoices**

     Click **Generate > All invoices.**

   - **Specific invoice(s)**

     Check the box(es) of the invoice(s) you want to generate finance charges for. Then click **Generate > Only checked invoices.**

4. When MR9 finishes generating the charges, it removes the updated invoice(s) from the results pane and an **Operation Successfu**l popup appears. Click **OK.**

IMPORTANT: Firms must have finance charge rates

Open invoices belonging to firms that have a "0.000" finance charge rate specified in their firm records will not be displayed and won't be assessed finance changes. To assign finance charge rates to firms, see Entering additional firm information. Or if you have multiple firms to apply the same rate to, use Bulk Update to add the rate to all of them at the same time. See Updating multiple firms at once.

Reference

- Firms
- Lookup panel
- Business Units
- Bulk Update

Step-by-step instructions

- Generating finance charges
- Entering additional firm information
- Looking up firms
- Generating finance charges manually
- Clearing finance charges
- Printing finance charges reports
- Updating multiple firms at once

Generating finance charges manually

If you have an invoice that is overdue — but you have not had MR9 automatically generate finance charges on it each month — you can add retroactive finance charges manually so you do not miss out on any amounts due.

You can also manually apply finance charges to invoices for firms that do not have a finance charge rate assigned to them in their MR9 listing. See Entering additional firm information.

Continued from Generating finance charges.

1. In the Generate Finance Charges by Manual window, enter the number of the invoice you want to generate finance charges for in the **Lookup By** field.

2. Click . MR9 automatically fills in the invoice details in the **Invoice Info** pane. It also lists any finance charges already applied to the invoice including who applied the charges and when. The fields in the **Invoice Info** pane are not editable. You can look up and update information about the **Bill To Firm** and **Bill To Contact** by clicking their . (See Updating firms and Updating contacts.)

3. in the **New Finance Charges** window's default blank listing, fill in both fields:

   - **Finance Charge Date** – Enter a date manually or click to use the Date Navigator.
   - **Finance Charge Amount** – Enter the amount you want applied for the date entered.

4. If you want to add more finance charges to the invoice, click in the **New Finance Charges** header and repeat step 3. If you want to remove a finance charge before applying it, check its box and click .

5. Click **Save >**

   - **Save & New:** To save the charges and continue generating finance charges manually.
   - **Save & Close:** When you are finished generating finance charges.

Reference

- Firms
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Entering additional firm information
- Generating finance charges
- Updating firms
- Updating contacts
- Generating finance charges automatically
- Clearing finance charges
- Printing finance charges reports

Clearing finance charges

When a client makes a payment that only covers the current balance of an invoice and not the finance charge, you can zero out the finance charge. However, any invoice with a zero balance is considered paid in full even though it still has unpaid finance charges or late charges.

1. **Receivables > Finance Charge**s
2. In **Search By** pane, make selections if needed:
   - **Finance Charge Date From**

     Default is today. Change date if desired. See Date Navigator.
   - **Finance Charge Date To**

     Leave blank unless you are looking for charges in a date range in the past.
   - **Bill To Firm**

     To clear finance charges for a particular client, click . See Looking up firms. Otherwise, leave blank to find finance charges for all clients.
   - **Invoice No.**

     Enter an invoice number to find finance charges for a single invoice.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs
3. Click . MR9 lists all of the open invoices that meet the specified search condition(s).
4. To clear finance charges for:
   - **All invoices**

     Click **Clear > All invoices.**
   - **Specific invoice(s)**

     Check the box(es) of the invoice(s) you want to clear finance charges for. (Listed entries without a checkbox have a Finance Charge Balance of zero.) Then click **Clear > Only checked invoices.**
5. When MR9 finishes clearing the charges, it adds the removed charge(s) to the results grid and an Operation Successful box appears. Click **OK.**

NOTE: Cleared finance charges are not deleted

MR9 does not actually zero out the finance charge for each cleared invoice. It creates an

entry in the InvoicesFCLog table with a negative amount for the finance charge so that you will have an audit trail.

Reference

- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up firms
- Generating finance charges
- Printing finance charges reports

Printing finance charges reports

You can export and print finance charge results if you want a record of finance charges you generated and cleared today or for other dates ranges and different search criteria.

1. **Receivables > Finance Charges**
2. In **Search By** pane, click to see your activity for today. To generate reports for other time periods, a specific firm, invoice number, or specific business units, use the search filters:
   - **Finance Charge Date From**

     Default is today. Change date if desired. See Date Navigator.
   - **Finance Charge Date To**

     Leave blank unless you are looking for charges in a date range in the past.
   - **Bill To Firm**

     Click to restrict search to one firm. See Looking up firms.
   - **Invoice No.**

     Enter the entire invoice number to generate a report of finance charges for one invoice.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
3. Click . MR9 lists all of the invoices for which you generated or cleared finance changes that meet your search criteria.
4. To export and print the results, click and select an export file type. See Exporting & printing results.

Reference

- Business Units

Step-by-step instructions

- Generating finance charges
- Clearing finance charges
- Exporting & printing results

Sending monthly statements

Send monthly statements and/or open invoices to clients, either by email or regular mail. Attorneys receive separate statements unless their firm is flagged to consolidate statements.

1. **Receivables > Send Statements**
2. In the **Search By** pane, leave as defaults to send all open invoices or make selections:

- **Statement Sending Method**

  Default is Email. To search by other ways clients want to receive their statements or include all ways, click . See Lookup panel. Contacts can each have their own preferred sending method in their profiles. See Entering additional contact information.

- **Invoice Date From**

  Leave blank unless you want to define a date range. See Date Navigator.

- ***Invoice Date To**

  Required. Defaults to 30 days ago, so as not to include current invoices. Use the Date Navigator if you want to change the date range.

- **Party Type**

  Bill To – Default. Firm that pays invoices.

  Bill To Parent – Multi-office company that the firm paying invoices is part of.

- **Firm**

  To send statements for a single firm. See Looking up firms.

- **Firm Class**

  Quality or ranking of a law firm. Default is ALL. To search for one or more classes, click . See Lookup panel. (Classes are set in Lists > Firms, and a firm is ranked in their **Marketing** pane. See Entering firm marketing information.)

- **Order No.**

  To send statements related to a single order, enter the entire order number.

- **Print Claim No. on Statement**

  Default is No. Slide to Yes to include insurance claim numbers on statements.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click

to restrict search to firms tied to specific BUs. See Lookup panel.

3. Click . MR9 lists all of the clients that meet the specified search condition(s), along with their preferred sending method and the outstanding amount. You can click any hyperlinked firm or contact name to view/edit their listing.

   NOTE: Include preferred send method in client listins

   The default method by which a statement is sent comes from either the contact or firm:

   - **If a firm is set up for consolidated statements,** then statements are sent via the **Statement Sending Method** in the firm' listing, and a **Notes Log** entry is automatically created in the firm. (See Entering additional firm information.)
   - **If statements are not consolidated,** but instead sent to individual contacts within the firm, the statements are sent via the contact's **Statement Sending Method** in the contact's listing, and a **Notes Log** entry is automatically created in the contact. (See Entering additional contact information.)
     - **If emailed:** They are sent to the contact's Accounting notification email address. (See Managing notification emails.)
     - **If printed:** Statements have the firm's billing address instead of their main address. (See Entering general firm information.)

4. Check box(es) of clients to whom you want to send statements.

5. Click **Send >**

   - **Print Open Invoices Only** – To save or send detailed invoices for outstanding balances without summary statements via regular mail. See Printing invoices, statements, & reports.
   - **Print Statements Only** – To save or send summary of outstanding balances due via regular mail. See Printing invoices, statements, & reports.
   - **Print Statements and Open Invoices** — Include invoices that detail the outstanding balances with the statements that detail the outstanding balances as a printed record or to send via regular mail. See Printing invoices, statements, & reports.
   - **Email Open Invoices Only** – To send detailed invoices for outstanding balances without summary statements to clients' Accounting email addresses (see Managing notification emails). See Emailing from MR9. After sending the email, MR9 makes an entry recording the email in the Notes Log of the contact(s) and the Email Log.
   - **Email Statements Only** – To send statements without invoices to clients' Accounting email addresses. See Emailing from MR9. After sending the email, MR9

makes an entry recording the email in the Notes Log of the contact(s) and the Email Log.

- **Email Statements and Open Invoices** — Include invoices that detail the outstanding balances with the statements in emails to clients' Accounting email addresses. See Emailing from MR9. After sending the email, MR9 makes an entry recording the email in the Notes Log of the contact(s) and the Email Log.

NOTE: Printed statements display color-coded invoice info

If you choose to print out statements to send to clients, the invoices listed on the statements are color coded by age as a visual clue to clients. You can customize the colors for each age range in System Preferences > Receivables > Statement.

Reference

- Consolidated Invoices and Statements
- Lookup panel
- Date Navigator
- Lists > Firms
- Business Units
- Results pane
- Email Log
- Statement preferences

Step-by-step instructions

- Entering additional contact information
- Looking up firms
- Entering firm marketing information
- Entering additional firm information
- Managing notification emails
- Entering general firm information
- Printing invoices, statements, & reports
- Emailing from MR9
- Viewing email logs

Collections

Collections is the process of pursuing payments of debts owed by individuals or businesses. Use MR9's collection tools to make your collection efforts more productive:

1. Use Aged A/R to find clients who owe you the most money for the longest period of time.
2. Contact the clients while you have all of the relevant information at your fingertips. Send collection letters with details automatically filled in by MR9 and related invoices attached.
3. Record your collection efforts and set reminders to follow up.
4. Follow up until you are paid.

Reference

- Aged A/R
- Collection Letters
- Collection Follow-up
- Collection Forecast

Step-by-step instructions

- Finding overdue invoices
- Recording collections efforts
- Sending collection letters
- Following up on collection promises
- Forecasting cash flow from collections

Managing open check requests

Find outstanding check requests in the system. View/update request details. Delete requests if they are not needed.

1. Set search parameters

1. **Payables > Request Checks**
2. In the **Search By** pane, click to see all outstanding check requests or specify the following search filters:

   - **Issued By**

     The user who entered the request into the system. Default is ALL. Click to restrict search to a single user. See Looking up users.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

NOTE: Manage a part's check request inside the part

You can view, edit, and delete check requests to a part in the part's **Fee Checks** pane. You can also enter new requests (see Entering & updating fee check requests in parts).

2. View results

1. Click . MR9 lists all of the check requests that meet the specified search condition(s). To view/update a request, click its hyperlinked **Order.Part.No.** Then click **Edit** in the View Check window if you want to update the request. See Entering & updating check request details.

   Or use shortcuts in the results grid: Click the request's >

   - **View** – To open the request in its View Check window.
   - **Edit** – To update the request. See Entering & updating check request details.
   - **Delete** – To delete the request. In the popup that appears, click **Yes.**

3. Export/print results

To export and save the results, click and select an export file type. See Exporting & printing results.

Reference

- Lookup panel
- Business Units

Step-by-step instructions

- Looking up users
- Entering & updating fee check requests in parts
- Entering & updating check request details
- Exporting & printing results

Fee Check

Payments custodians require before releasing records to you are paid through MR9 with printed checks or credit card payments.

Step-by-step instructions

- Entering check requests in batches
- Managing open check requests
- Managing fee checks
- Printing custodian fee checks

Clearing payments manually

With your bank and credit card statements in hand, note in MR9 which checks/credit card payments have cleared so your MR9 records are up to date. All of the checks that are on your bank statement are cleared checks, and all payments listed on credit card statements are cleared payments. Any checks/credit card payments not listed on the statements have not cleared.

1. **Payables > Fee Checks**
2. In the **Search By** pane, leave **Date Type** as Check/Pay Date and set the **Date From/Date To** range to cover the payments listed in your statement(s).
3. Click . MR9 lists all payments you made by check or credit card in the results grid.
4. Compare the payments listed to your statements to find those that have been cleared by your bank.
5. For each payment you want to mark as cleared, either:
   - Click its **> Edit.**
   - Click its **Check No./Credit Card No.** hyperlink. Then in the View Check window, click **Edit.**
6. In the **Check Info** pane of the Edit Check window, enter the date on your statement that the check/credit card payment was debited from your account in **Cleared Date** or select it in the **Date Navigator**.
7. Click **Save.** MR9 includes the **Cleared Date** in the check's listing.
8. Repeat until all payments that have cleared your bank are also marked as cleared in MR9.
9. To export and save or print the results, click and select an export file type. See Exporting & printing results.

NOTE: Clear checks automatically in MR9

You can also clear checks automatically by importing your bank statements in Import Check Reconciliation Data. See Clearing payments automatically.

Reference

- Date Navigator
- Lookup panel
- Import Check Reconciliation Data

Step-by-step instructions

- Entering & updating check request details
- Exporting & printing results
- Clearing payments automatically

Clearing payments automatically

Import the data file that contains your current bank statement to have MR9 update its records to indicate which payments you made have cleared the bank. Export the results to save as a report of the checks that were/were not imported into MR9.

IMPORTANT: Set up MR9 to import payment data correctly

Before you can import your bank statements accurately into MR9, enter the correct coordinates in System Preferences for the placement of specific data in the files you receive from your bank. See Check Reconcilliation Data preferences.

1. **Payables > Import Check Reconciliation Data**
2. In the **Search By** pane, click ***File** field's .
3. Locate the bank statement data file you want to import on your computer and upload it.
4. Click .
5. MR9 displays the check information from the uploaded file in the results grid. Review the information, then click **Import.**
6. MR9 matches the check numbers to those in your MR9, opens the Results of Import Check Reconciliation Data window, and displays the results in 2 panes:
   - **Imported** – Data in the bank statement that matches data in MR9.
   - **Not Imported** – Any checks that were not imported. The **Error** column lists the reason for any checks not imported.
7. To export and save the results in either pane, click its and select an export file type. See Exporting & printing results.
8. Click **Close.**

NOTE: Clear checks manually in MR9

You can also clear individual checks in Fee Checks. See Clearing payments manually.

Reference

- Check Reconcilliation Data preferences
- Fee Checks

Step-by-step instructions

- Exporting & printing results
- Clearing payments manually

Finding checks

Use bank reconciliation function to find checks issued in MR9 and create reports of outstanding checks and/or checks cleared by your bank and also in MR9.

1. Search for checks

1. **Payables > Bank Reconciliation**
2. In the **Search By** pane, click to see which checks were issued today. To reconcile your MR9 records with your bank account, specify the following search filters before clicking :

   - **Date Type**

     Select which kind of date in the dropdown:

     - **Check Date** – Default. Date on the issued check.
     - **Cleared Date** – Date on your bank statement the check cleared. Use this for checking your bank statement against your MR9 records for cleared checks.

   - ***Date From/*Date To**

     Default is today. Change date range to your bank statement range to check cleared checks against it. See Date Navigator.

   - **Status**

     Select which stage(s) of check processing to include in the dropdown:

     - **ALL** – Default. Both cleared and outstanding checks.
     - **Cleared Checks** – Checks that have appeared on your bank statements that you have already entered in MR9 as cleared. Use this for reconciling.
     - **Outstanding Checks** – Checks that have not been paid out by your bank yet.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.

2. Export/print results

To export and save or print the results, click and select an export file type. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Entering & updating check request details
- Exporting & printing results

Editing forms & letters

Update form templates in the system or edit active forms before sending them. Insert headers, footers, graphics, and tables. Format everything to match your needs and corporate culture. Add MR9 data fields to form templates. MR9 automatically saves your work at regular intervals.

Edits to form templates are saved systemwide and are available to all of your MR9 registered users. Edits to active forms are one-off changes — they are not saved in the system.

Continued from Creating/updating forms & letters or Sending forms individually.

In the New Form/Edit Form/preview form window, click a tab to access tools to customize the form:

- **File**

  To perform basic functions, see Editing form File options.

- **Home**

  Default view. To customize the form's formatting using the tools in this tab, see Editing form Home options.

  IMPORTANT: Copying & pasting from outside sources is restricted
  For security reasons, you cannot copy and paste content from external sources except via **Use Local Clipboard,** found under Home. This prevents the inadvertent or unintended insertion of background code that would compromise a form's formatting.

- **Insert**

  To add headers, footers, page numbers, images, graphics, pages, page breaks, tables, special symbols, hyperlinks, and text frames, see Editing form Insert options.

- **Page Layout**

  To set page options like margins, orientation, columns, backgrounds, borders, and paragraph spacing, see Editing form Page Layout options.

- **View**

  To change your workspace view options, such as zoom in or show invisible characters, see Editing form View options.

- **Data Fields**

  In form templates only

  To insert data fields, see Editing form Data Fields options.

- **Table Tools**

  In forms with tables only

  If your form has a table in it, this tab appears when you click in a table. To set table

options such as table properties, adding/deleting cells/columns/rows, frames and backgrounds, and paragraph alignment in table cells, see Editing form Table Tools options.

- **Frame Formatting**

  In forms with graphics only

  If your form has graphics in it, such as your company logo, this tab appears when you click a graphic. To set options for how graphics appear in your form, see Editing form Frame Formatting options.

TIP: Change several options at once

In any section of a tab's tool bar that has in the lower right corner, click it to access a dialog box of options. You can change multiple related options at once in a popup.

Reference

- Form Types and Groups

Step-by-step instructions

- Creating/updating forms & letters
- Sending forms individually
- Moving forms to other types/groups
- Editing form File options
- Editing form Home options
- Editing form Insert options
- Editing form Page Layout options
- Editing form View options
- Editing form Data Fields options
- Editing form Table Tools options
- Editing form Frame Formatting options

Editing form File options

Form Templates' File options let you import documents from other applications to use, export forms to edit or use in other applications, and print your templates.

Continued from Editing forms & letters.

In the New Form/Edit Form window, click **File >**

- **Import**

  In form templates only

  To add an existing document (.doc, .docx, .pdf, .tx, .txt formats) to your form, select the document from your computer. MR9 imports the file as editable text and graphics.

- **Export**

  To export the form to edit in other applications, select a file format in the **Select Format** popup's dropdown, then click **Save.**

- **Print**

  To print the template, set options and print from the browser's print screen that appears.

TIP: Print from View Form window

The **File > Print** option is available in the View Form window so you can quickly print out a template without opening its Edit Form window.

Step-by-step instructions

- Creating/updating forms & letters
- Editing forms & letters
- Editing form Home options
- Editing form Insert options
- Editing form Page Layout options
- Editing form View options
- Editing form Data Fields options
- Editing form Table Tools options
- Editing form Frame Formatting options

Editing form Home options

Customize the look of the form and edit text with this tab which contains most of the common formatting tools in word processors.

Continued from Creating/updating forms & letters.

In the New Form/Edit Form window, **Home** is the default view. Select text, images, etc. to change/format, then select:

- **Clipboard**
  -

Use Local Clipboard

    1. To add something to your template that you copied from a file in another program, click in the form where you want to insert the text.
    2. Click this button.
    3. Paste using your browser's Paste command.

    IMPORTANT: Copying & pasting from outside sources requires this feature

    For security reasons, you cannot copy and paste content from external sources except via **Use Local Clipboard.** This prevents the inadvertent or unintended insertion of background code that would compromise the template's formatting.

  -

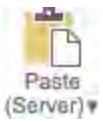
Cut

    Selected template contents will be deleted from its current location in the form and saved to the clipboard to be pasted elsewhere.

  -

Copy

    Selected template contents will be copied, not deleted, and saved to the clipboard to be pasted elsewhere.

  - 

Paste (Server)

    Contextual list. Depending on what was cut/copied within the template, Formatted Text, Unformatted Text, Image, Text Frame, Chart, Barcode, or Drawing will be active. *(This does not work with content copied from other programs.)*

- **Font**

  To format text in the template, see Customizing fonts in form templates using defaults and Customizing fonts in form templates with advanced options.

- **Paragraph**

  To format paragraphs in the template see Styling paragraphs in form templates using defaults and Styling paragraphs in form templates with advanced options.

- **Styles**

  - **Styles**

    If you imported a document for your template, MR9 imports any formatting styles attached to the document. Change the style of any selected text in the form to one of the styles in the list.

    If you want to customize styles in a template or add new ones, Adding & modifying styles in form templates.

- **Editing**

  - **Undo**

    Revert the last change you made to its previous status. Continue clicking **Undo** to step back through changes made to the template since it was last saved.

  - **Redo**

    Reverse the last **Undo** made. Continue clicking **Redo** to step forward restoring changes made to the template since it was last saved.

  - **Find**

    Search the template for specific text by entering it in the **Find** popup, check any options to restrict the search, then click **Find Next.** MR9 will search from the cursor insertion point forward through the template, highlighting the found text. Keep clicking **Find Next** to see each instance of the entered text highlighted one at a time. Click **Cancel** to close the popup.

  - **Replace**

    Search the template for specific text and replace it with new text by entering the existing text in the **Find what** field and the new text in the **Replace with** field of the **Replace** popup. Check any options to restrict the search, then click:

    - **Find Next** – To find the first instance of the existing text from the cursor insertion point forward through the template. Keep clicking **Find Next** to see each instance of the entered text highlighted one at a time.
    - **Replace** – To replace the highlighted text with the new text and automatically move to the next instance of text to be replaced.

- **Replace All** – To replace all instances of the existing text with the new text at once. When complete, a popup appears listing the number of instances text was replaced. Click **OK.**

  Click **Cancel** to close the popup.

- Select All **Select All**

  Selects all text, images, formatting, etc. in the area (main, header, or footer) where the cursor is inserted.

Step-by-step instructions

- Creating/updating forms & letters
- Customizing fonts in form templates using defaults
- Customizing fonts in form templates with advanced options
- Styling paragraphs in form templates using defaults
- Styling paragraphs in form templates with advanced options
- Adding & modifying styles in form templates
- Customizing colors in form templates
- Editing form File options
- Editing form Insert options
- Editing form Page Layout options
- Editing form View options
- Editing form Data Fields options
- Editing form Table Tools options
- Editing form Frame Formatting options

Customizing fonts in form templates using defaults

Customize the font treatment of selected text in form templates. As you make changes to selected text onscreen MR9 updates the appearance of the text. Or you can use the popup dialog box which includes more options to make multiple changes at once. When you click **OK** in the popup, MR9 will update appearance of the text to reflect all of your changes.

Continued from Editing form Home options.

1. In the **Font** section of the **Home** tab in a form template, select options:

   - **[Font name]**

     Scroll up or down the list of fonts and typefaces to select a different font for the selected text.

   - **[Font size]**

     Scroll up or down the list of default font sizes to select a different size for the selected text.

   - **Enlarge Font Size**

     Increase font size by one point increments.

   - **Reduce Font Size**

     Decrease font size by one point increments.

   - **Clear Formatting**

     Undo any customization you have done to selected text.

   - **Bold**

     Toggle the selected text's weight between the default and bold.

   - **Italic**

     Toggle the selected text's style between the default and italic/oblique.

   - **Underline**

     Select an option in the dropdown:

     - **Single** – Underline selected text, including word spaces, with a single line.
     - **Doubled** – Underline selected text, including word spaces, with a double line.
     - **Single, only Words** – Underline selected text only, not word spaces, with a single line.

- **Doubled, only Words** – Underline selected text only, not word spaces, with a double line.

- **abc Strike out**

  Draw a line through the selected text.

- **X₂ Subscript**

  Make the selected text smaller and move it down half a line.

- **X² Superscript**

  Make the selected text smaller and move it up half a line. For more subscript and superscript options, see Customizing fonts in form templates with advanced options.

- **Aa ▾ Change Case**

  Select an option in the dropdown. (For more case options, see Customizing fonts in form templates with advanced options.):

  - **Sentence case** – First letter of the first word of each sentence is capitalized.
  - **lowercase** – No letters are capitalized.
  - **UPPERCASE** – All letters are capitalized.
  - **Capitalize Each Word** – First letter of every word is capitalized.
  - **tOGGLE cASE** – Upper and lowercase are reversed in selected text.

- **Text Highlight Color**

  Select a color in the default palette as a color bar behind the selected text. To use a custom color, click **More Colors...** in the default color palette dropdown. See Customizing colors in form templates.

- **Text Color**

  Select a color in the default palette for the selected text. To use a custom color, click **More Colors...** in the default color palette dropdown. See Customizing colors in form templates.

2. If you want more font customization options, see Customizing fonts in form templates with advanced options.

TIP: Use Styles to save time formatting text
Instead of changing the appearance of selected text one attribute at a time, set up styles that include all of the attributes. Then you can simply highlight text and apply the style with a click. See Adding & modifying styles in form templates.

Step-by-step instructions

- Creating/updating forms & letters

- Editing form Home options
- Customizing fonts in form templates with advanced options
- Customizing colors in form templates
- Adding & modifying styles in form templates

Customizing fonts in form templates with advanced options

If the default options for fonts don't give you enough control, use the **Font** popup dialog box in form templates. It includes additional formatting options for text positioning, spacing, scaling, and other treatments.

Continued from Editing form Home options or Customizing fonts in form templates using defaults.

1. With text selected in a New Form/Edit Form window, click in the lower right corner in the **Font** section of the **Home** tab.
2. On the **Font and Color** tab of the **Font** popup, select options:
   - **Font**

     Scroll up or down the list of typefaces to select a different one for the selected text.
   - **Size**

     Enter a number or scroll up or down the list of default font sizes to select a different size for the selected text.
   - **Color**
     - **Text** – To change the color of the text, select one of the default colors in the dropdown or click **Other** and choose a color in the **Text Color** popup. See Customizing colors in form templates.
     - **Text Background** – To change the color of the elect one of the default colors in the dropdown or click **Other** and choose a color in the **Text Color** popup. See Customizing colors in form templates.
   - **Attributes**

     Change the text style by checking one or boxes:
     - **Normal** – Default.
     - **Bold** – The selected text will appear bolded.
     - **Italic** – The selected text will be italic/oblique style.
     - **Strike out** – A line will be drawn through the selected text.
   - **Underlining**
     - **Without** – Default.
     - **Single** – Underline selected text, including word spaces, with a single line.

- **Doubled** – Underline selected text, including word spaces, with a double line.
- **Single, only Words** – Underline selected text only, not word spaces, with a single line.
- **Doubled, only Words** – Underline selected text only, not word spaces, with a double line.

3. On the **Positions and Effects** tab of the **Font** popup, select options:

- **Position and Spacing**
  - **Sub/Superscript**
    - **None** – Remove any sub/superscript formatting.
    - **Superscript** – Make the selected text smaller and move it up half a line.
    - **Subscript** – Make the selected text smaller and move it down half a line.
    - **Superscript (same upper edge)** – Make the selected text smaller but only move it up to the top of the regular text's highest ascender.
    - **Subscript (same baseline)** – Make the selected text smaller but only move it to sit on the same baseline as the regular text.
  - **Position** –If you want to move text up or down in a line of text similar to Sub/Superscript but not change the text size:
    - **Normal** – Restore text placement to baseline.
    - **Up** – Move selected text up from the baseline by the number of points specified in the **pt** field. Increase or decrease the distance in points by clicking the **pt** field's up or down arrow.
    - **Down** – Move selected text down from the baseline by the number of points specified in the **pt** field. Increase or decrease the distance in points by clicking the **pt** field's up or down arrow.
  - **Character Spacing**
    - **Normal** – Restore text spacing to neutral.
    - **Expanded** – Space out the letters in the selected text by the number of points specified in the **pt** field. Increase or decrease the distance in points by clicking the **pt** field's up or down arrow.
    - **Down** – Compress the letters in the selected text by the number of points specified in the **pt** field. Increase or decrease the distance in points by clicking the **pt** field's up or down arrow.

- **Further Effects**
  - **Uppercase**
    - **None** – No case changes in the selected text.
    - **All Caps** – All letters are capitalized.
    - **Small Caps** – All letters are capitalized but only letters that were capitalized in the select text are full size. Letters that were lowercase are capitalized but are a shorter height.
    - **Petite Caps** – Similar treatment as Small Caps but the capitalized lowercase text is smaller.
  - **Character Scaling** – Expand or condense the width of the characters in the select text by 10% by clicking the up or down arrow in the **%** field. Or overwrite the number in the field.

4. Click **OK.**

TIP: Use Styles to save time formatting text

Instead of changing the appearance of selected text one attribute at a time, set up styles that include all of the attributes. Then you can simply highlight text and apply the style with a click. See Adding & modifying styles in form templates.

Step-by-step instructions

- Creating/updating forms & letters
- Editing form Home options
- Customizing fonts in form templates using defaults

Styling paragraphs in form templates using defaults

Customize the appearance of selected paragraphs in form templates. As you make changes to selected text onscreen MR9 updates the appearance of the paragraph(s). Or you can use the popup dialog boxes to make multiple changes at once. When you click **OK** in a popup, MR9 will update appearance of the paragraph(s) to reflect all of your changes.

TIP: Popup dialog boxes have more options

Generally, the paragraph options in the **Home** section of a form template window are common defaults. If you want more control over paragraph styling, use the **Paragraph** popup. See Styling paragraphs in form templates with advanced options. And if you want more control over the appearance of bulleted/numbered lists, use the **Bullets and Numbering** popup. See Formatting lists in form templates.

Continued from Editing form Home options.

In the **Paragraph** section of the **Home** tab in a New Form/Edit Form window, select options:

- **Bullets**

  Select one of the default bullet types to mark each paragraph of selected text. Or to customize the appearance of the list click **Format Bulleted List...** in the dropdown, then select/enter values to customize the list appearance in the **Bullets and Numbering** popup. See Formatting lists in form templates.

- **Numbering**

  Select one of the default numbering styles to mark each paragraph of selected text. Or to customize the appearance of the list click **Format Numbered List...** in the dropdown, then select/enter values to customize the list appearance in the **Bullets and Numbering** popup. See Formatting lists in form templates.

- **Multilevel List**

  Select one of the default indent and numbering styles to format paragraphs of selected text in lists. Or to customize the appearance of the list click **Format Structured List...** in the dropdown, then select/enter values to customize the list appearance in the **Bullets and Numbering** popup. See Formatting lists in form templates.

- **Decrease Indent**

  Move the selected text out to the left margin by the tab settings for the paragraph. (Will not extend past the page margin.)

- **Increase Indent**

  Move the selected text in from the left margin by the tab settings for the paragraph. For more control over indents, see Styling paragraphs in form templates with advanced options.

- **Left-To-Right**

  Default. Text is flush left, reads left to right.

- **Right-To-Left**

  Used for text in languages, such as Arabic or Hebrew, that read right to left.

- **Tabs**

  Opens **Tabs** popup to select/enter values for tab stops in the selected text. See Setting tabs in form templates.

  TIP: Set tabs visually

  Instead of using the **Tabs** button, use the horizontal ruler at the top of the form to add tabs to selected text, click and drag tabs to change their location, or drag tabs off the ruler to delete them. Default is left tab but you can click the button to the left of the ruler to cycle through the different tab options — left, right, center, decimal, right margin — before placing a different type of tab on the ruler.

- **Show/Hide Control Characters**

  Toggle control characters (format indicators — like word spaces and paragraph returns — that do not appear in printed versions of the document) on and off.

- **Left Align Text**

  Have selected text line up on left margin only.

- **Center Text**

  Have selected text align to a midpoint.

- **Right Align Text**

  Have selected text line up on right margin only.

- **Justify Text**

  Have selected text line up on both left and right margins.

- **Line Spacing**

  Select from one of the default numbers in the dropdown for how much space each line of the selected text occupies vertically.

- **Borders**

  Select border location(s) in the dropdown for the area of selected text. (For more control over borders/frames, see Styling paragraphs in form templates with advanced options.):

  - **Left** – Place a border on the left side of the text's paragraph or table cell.
  - **Top** – Place a border on the top side of the text's paragraph or table cell.

- **Right** – Place a border on the right side of the text's paragraph or table cell.
- **Bottom** – Place a border on the bottom side of the text's paragraph or table cell.
- **Outside Frames** – Place a border on all sides of the text's paragraph, table, or table cell.
- **All Frames** – Place a border on all sides of the text's paragraph, table, or table cell.
- **Inside Horizontal Frames** – Place horizonal borders between the text's rows in a table.
- **Inside Vertical Frame** – Place vertical borders between the text's columns in a table.

To undo any of these choices, click them again in the dropdown while the text is selected.

- **Background Color**

  Select background color in the dropdown for the text area of selected text. To use a custom color, click **More Colors...** in the dropdown. See Customizing colors in form templates.

- **Frame Color**

  With border location(s) selected for the text area in **Borders,** select their color in the default palette. To use a custom color, click **More Colors...** in the dropdown. See Customizing colors in form templates.

- **Frame Line Width**

  With border location(s) selected for the text area in **Borders,** select their line width in the dropdown.

TIP: Use Styles to save time formatting paragraphs

Instead of changing the appearance of selected paragraphs one attribute at a time, set up styles that include all of the attributes. Then you can simply highlight paragraphs and apply the style with a click. See Adding & modifying styles in form templates.

Step-by-step instructions

- Editing form Home options
- Styling paragraphs in form templates with advanced options
- Formatting lists in form templates
- Setting tabs in form templates
- Customizing fonts in form templates using defaults
- Customizing colors in form templates
- Adding & modifying styles in form templates

Styling paragraphs in form templates with advanced options

If the default options for paragraphs don't give you enough control, use the **Paragraph** popup dialog box in form templates. It includes additional formatting options for indents, line spacing, space between paragraphs, frames, and pagination rules.

Continued from Editing form Home options, Editing form Page Layout options, Styling paragraphs in form templates using defaults, or Adding & modifying styles in form templates.

1. In the **Paragraph** section of the **Home** tab in a New Form/Edit Form window, click in the lower right corner.
2. On the **Formatting and Indents** tab, make selections and enter text:
   - **Formatting**
     - **Alignment**
       - **Left** – Have selected text line up on left margin only.
       - **Centered** – Have selected text align to a midpoint.
       - **Right** – Have selected text line up on right margin only.
       - **Justified** – Have selected text line up on both left and right margins.
     - **Structure level** – Select one of the levels (1–10) in the dropdown for how deeply indented the selected text will be in a list.
     - **Line spacing** – How much space each line of the selected text occupies vertically. If you select:
       - **Multiple** – Enter how many single line heights each line of text in the selected style will occupy.
       - **At least** – Enter a minimum line height in points or use the arrows to increase/decrease the amount in the **pt** field.
       - **Exactly** – Enter a line height in points or use the arrows to increase/decrease the amount in the **pt** field.
     - **Direction**
       - **Left-to-right** – Default. Text is flush left, reads left to right.
       - **Right-to-left** – Used for text in languages, such as Arabic or Hebrew, that read right to left.

- **Indentation**
  - **Before text** – Enter a number or use the arrows to increase/decrease the left indent by 10ths of an inch for the selected text's paragraph(s).
  - **After text** – Enter a number or use the arrows to increase/decrease the right indent by 10ths of an inch for the selected texttext's paragraph(s).
  - **Special** – Select an option for the treatment of the first line of paragraphs:
    - **None** – First line is flush left with the left side of the paragraph.
    - **First line** – First line indents by the amount you enter in its **inch** field.
    - **Hanging** – First line outdents by the amount you enter in its **inch** field. (Will not extend past the page margin.)
- **Distances**
  - **Before** – Enter a number or use the arrows to increase/decrease the space above the selected text's paragraph(s) by 10ths of an inch.
  - **After** – Enter a number or use the arrows to increase/decrease the space below the selected text's paragraph(s) by 10ths of an inch.

3. On the **Frame and Page Breaks** tab, make selections and enter text:
   - **Frame**
     1. Select a border location by clicking its button — the frame image displays the current choice:
        - **None** – Remove any applied borders.
        - **Top** – Place a border on the top side of the text's paragraph or table cell.
        - **Bottom** – Place a border on the bottom side of the text's paragraph or table cell.
        - **Box** – Place a border on all sides of the text's paragraph, table, or table cell.
     2. With a frame option selected, you can make additional choices:
        - **Merge boxes of multiple paragraphs** – Instead of having the designated border on each paragraph of the selected text, have it treat the selected text's paragraphs as one area to border on.
        - **Line color** – Select one of the default colors in the **Color** dropdown for the frame. To use a custom color, click **Other** and designate a color in the **Frame Line Color** popup. See Customizing colors in form templates.

- **Line width** – Enter a number or use the up/down arrows to change the thickness of the frame line(s) by quarters of a point.
- **Distance from Text** – Enter a number or use the up/down arrows to designate the space between the border and the selected text.

- **Background**

  Select background color in the **Color** dropdown for the text area of selected text. To use a custom color, click **Other** and designate a color in the **Background Color** popup. See Customizing colors in form templates.

- **Pagination**

  Check the box(es) for pagination rule(s) for the selected text:

  - **Keep lines together** – To prevent the selected text from breaking internally between columns or pages.
  - **Keep with next** – To prevent the selected text from being in a separate column or page from the text that follows it.
  - **Page break before** – To start the text on a new page.
  - **Widow/Orphan Control** – To prevent the last # of lines specified in the selected text from starting in a new column or page. Use the up/down arrows to define how many lines you want to avoid being alone.

4. Click **OK.**

TIP: Use Styles to save time formatting paragraphs

Instead of manually changing the appearance of selected paragraphs each time, set up styles that include all of the attributes. Then you can simply highlight paragraphs and apply the style with a click. See Adding & modifying styles in form templates.

Step-by-step instructions

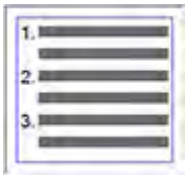
- Editing form Home options
- Editing form Page Layout options
- Styling paragraphs in form templates using defaults
- Adding & modifying styles in form templates
- Customizing colors in form templates

Formatting lists in form templates

If the default options for bulleted, numbers, and multilevel lists don't suit a template, customize the appearance of selected lists in form templates. The Bullets and Numbering popup includes formatting options for the position of the bullets/numbers/list levels, bullet characters, numbering systems, and other stylistic options.

Continued from Styling paragraphs in form templates using defaults or Adding & modifying styles in form templates.

1. In the **Bullets and Numbering** popup, select/enter values to customize the list appearance of the selected text.
2. Under **Bulleted/Numbered,** click a list type icon:
   -

No list formatting – Use to remove list formatting.
   - **Bulleted list** – Bullet formatting options will be available.
   - 

Numbered list – Number formatting options will be available.
   -

Multi-level list – Number formatting options will be available.
3. Select basic list options under **Formatting:**
   - **Bullet/Number position**

     How far indented the bullets/numbers of the selected text will be. Change the default value by using the up and down arrows. Negative numbers are not valid.
   - **Text position**

     *Applies when **Separating character** is set to Tab.*

     How far indented the selected text will be. Change the default value by using the up and down arrows. Negative numbers are not valid. If the number is less than the value in the Bullet/Number position, it will be ignored.

- **Separating character**

  What will be used between the bullets/numbers and text in the lines of selected text in a list.

  - **None** – Text will be aligned directly next to the bullet/number.
  - **Tab** – Text will be spaced by a tab from the bullet/number. Distance from the left is specified in **Text position.**
  - **Space** – Text will be one character space from the bullet/number.

- **Level**

  Select one of the levels (1–10) in the dropdown for how deeply indented the lines of selected text will be in a list.

4. If you selected:

   - **Bulleted list**

     Under **Bullet character:**

     - Click one of the default icons for the bullet image. Or click **Other** to select a symbol from a font on your computer. In the **Symbol** popup, select a font in the **Font** dropdown, then click the character you want in the grid and click **OK.**
     - To change the size of the bullet in the list, choose a set size in the **Size** dropdown.

   - **Numbered or Multi-level list**

     Under **Number format:**

     - Choose a styling option for the numbers of the list in the **Number style** dropdown. The Numbered and Multi-level list buttons above will include the style selected here.
     - If you want the list to start at a different number than 1, enter the number in **Start at.** (If you chose a different styling option above, enter the compatible character you want to start with. For example if you chose lowercase letters, type the lowercase letter in the alphabet that corresponds to the restart number.)
     - If you want a text character preceding each number, select the character in the **Text in front** dropdown.
     - If you want a text character different from the default . (period) after each number, select the character in the **Text after** dropdown.
     - Click **Restart numbering** to have the selected text in the list start over again at 1.

5. Click **OK.**

Step-by-step instructions

- Styling paragraphs in form templates using defaults
- Adding & modifying styles in form templates
- Editing form Home options
- Creating/updating forms & letters

Setting tabs in form templates

Add, delete, and customize tabs in the location and appearance of tabs in selected lines in a form template.

Continued from Styling paragraphs in form templates using defaults.

1. In the **Paragraph** section of the **Home** tab in a New Form/Edit Form window, select text you want to add/modify/delete tabs in and click .
2. In the **Tab** popup, **Tab stop position** displays the first tab in the selected text in the top field with the rest of the tabs in the deeper field below. Each tab includes its distance in inches from the left margin, its leader dot treatment, and the symbol for which alignment the tab has:
   - **Left**

     Tabbed text will align left at this distance.
   - **Center**

     Tabbed text will center with this distance as their midpoint.
   - **Right**

     Tabbed text will line up to the right at this distance.
   - **Decimal**

     Numbers in selected text line up on their decimal points.
3. To:
   - **Add a tab**

     Enter a distance in inches in **Tab stop position** — for distances less than an inch, include 0 (zero) before the decimal point — and select its alignment by clicking a radio button under **Alignment.**
   - **Modify an existing tab**

     Click the tab in the longer **Tab stop position** field to select it, then update the number to change the tab's distance from the left margin and/or change its alignment by clicking a radio button under **Alignment.**
   - **Delete a tab**

     Click the tab in the longer **Tab stop position** field to select it, then click **Delete.**
   - **Right most a tab**

     If you want the selected text to align to the page's right-most margin, click **Delete All, then check Right most tab.**

4. If you are adding/modifying a tab, you can add/change/remove its leader dots — the characters that fill the space between text to the left of the tab and text in the tab, commonly used in indexes. Click the **Leader** arrow and in the dropdown select one of the leader dot treatments or None to have no leader dots in the space.

5. Click **OK.**

TIP: Set tabs visually

Instead of using the **Tabs** button, use the horizontal ruler at the top of the form to add tabs to selected text, click and drag tabs to change their location, or drag tabs off the ruler to delete them. Default is left tab but you can click the button to the left of the ruler to cycle through the different tab options — left, right, center, decimal, right margin — before placing a different type of tab on the ruler.

Step-by-step instructions

- Styling paragraphs in form templates using defaults
- Editing form Home options
- Creating/updating forms & letters

Adding & modifying styles in form templates

Using styles is a quick way to style the appearance of your forms. Instead of changing the appearance of selected text one attribute at a time, you can set up styles that include multiple attributes. Then you can simply highlight text and apply the style with a click. Using styles ensures consistency in your form's appearance because you reduce the chance of errors in your formatting.

You can create styles that apply to only selected characters in your text or whole paragraphs. Character styles override paragraph styles so you can emphasize certain phrases or words in a paragraph with a different style for example.

If you imported a document for your template, MR9 imports any formatting styles attached to the document. You can customize styles in a template, add new ones, and delete ones you don't need.

Continued from Editing form Home options.

1. In the **Home** tab of a New Form/Edit Form window, click **Styles > Manage Styles.**
2. In the **Styles** popup, to:
   - **Modify an existing style** – Select the style in the list and click **Modify.**
   - **Add a style** – Click **New.**
   - **Delete a style** – Select the style in the list and click **Delete.**
3. In the **Modify Style/New Style** popup, enter text and make selections:
   - **Name**

     Edit or enter text for the style's name.
   - **Based on**

     New styles only

     Select an existing style in the dropdown to copy its formatting into your new style.
   - **Style for the following paragraph**

     *Available when **Style type** is set to Paragraph*

     Select one of the existing styles in the dropdown for new paragraphs that you create after a paragraph with this style.
   - **Style type**

     New styles only
     - **Paragraph** – This style will apply to the paragraph(s) of selected text.
     - **Character** – This style will apply to only the selected text.

- **Format**

  Click one of the buttons to further customize one of these formatting options:

  - **Font** – To format the appearance of text in the selected style, see Customizing fonts in form templates using defaults and Customizing fonts in form templates with advanced options.
  - **Paragraph** – *Paragraph styles only.* To format the appearance of paragraphs in the selected style, see Styling paragraphs in form templates using defaults and Styling paragraphs in form templates with advanced options.
  - **Tabs** – *Paragraph styles only.* To format the appearance of tabs, see Setting tabs in form templates
  - **Numbering** – *Paragraph styles only.* To format the appearance of bulleted and numbered list styles, see Formatting lists in form templates.
  - **Language** – Usually left at the default option, **Do not define Language,** but you can also select a specific language for the style in the dropdown.

4. To save your style, click **OK** in the **Modify Style/New Style** popup.

Step-by-step instructions

- Editing form Home options
- Customizing fonts in form templates using defaults
- Customizing fonts in form templates with advanced options
- Styling paragraphs in form templates using defaults
- Styling paragraphs in form templates with advanced options
- Setting tabs in form templates
- Formatting lists in form templates

Customizing colors in form templates

Instead of using the default colors in the Form Templates palette, you can change the color of text, text highlights, paragraph backgrounds, and text borders to any color you want.

Continued from Customizing fonts in form templates using defaults, Customizing fonts in form templates with advanced options, Styling paragraphs in form templates using defaults, Styling paragraphs in form templates with advanced options.

1. In the color palette popup, you can start from the default color displayed in the square **Color** field or click one of the pre-set color squares. Then use one of the color tools to customize the color:

   - **Visual color picker** – In the rainbow scale, click in the basic hue you want. The higher in the rainbow field you click the more saturated/pure the color. Clicking lower in the field de-saturates the color. Then drag the arrow up or down the luminance scale to make the color lighter or darker.
   - **Hue, Saturation, Luminance** – Instead of using the visual color picker, enter numerical values for the same values.
   - **Red, Green, Blue** – Instead of the HSL color models, enter numbers for the primary colors of light.

2. To save the color to use again, click **Add to Custom Colors.**
3. Click **OK.** The selected text, paragraph, border, frame, etc. appears in the custom color.

Step-by-step instructions

- Customizing fonts in form templates using defaults
- Customizing fonts in form templates with advanced options
- Styling paragraphs in form templates using defaults
- Styling paragraphs in form templates with advanced options

Editing form Insert options

Form Templates' Insert options let you add headers, footers, page numbers, images, graphics, pages, page breaks, tables, special symbols, hyperlinks, and text frames.

Continued from Editing forms & letters.

In the New Form/Edit Form window, click **Insert,** then use these options:

- ## Pages
  - ### Blank Page

    Click to add a page at the end of the form.
  - ### Page Break

    Click to start a new page where the cursor is in the form.

- ## Tables

  There is no conversion of text to table in Form Templates, but you can add tables, then cut and paste or enter text and insert data fields in the table cells.

  - ### Insert Table >

    1. In the **Insert Table** dropdown, either:
       - Drag across and down through the boxes to select the number of rows and columns for your table.
       - Click **Insert Table** to enter table parameters in the **Insert Table** popup box. See Adding custom tables to form templates.
    2. Edit the table on the form using Table Tools.
    3. Format text in the table using Home options.
    4. Add merge fields using Data Fields.

- ## Illustrations

  Insert illustrations into forms then use Frame Formatting to fine-tune their position and relationship to text in the document. See Editing form Frame Formatting options.

  - ### Image

    Click to insert an image file (.jpg, .png, .bmp, .tif formats) where the cursor is in the form. In the **Choose Files to Upload** popup find the file you want to insert, then click **Upload.**

- ### Shapes >
  - Select a shape type, then click on the form to add a default-sized shape — or click and drag across the form to create a custom-sized shape. Use Frame Formatting to edit the appearance of the shape including colors and size. See Editing form Frame Formatting options.
  - To make an illustration consisting of a group of shapes, choose **New Drawing Canvas** in the **Shapes** dropdown. Then insert shapes to the canvas. You can modify individual shapes on the canvas after adding all shapes.

  #### NOTE: Turn off shape outlines

  The default for shapes is for a light gray non-printing rectangular outline to appear around them. You can turn the outline off by toggling **Shapes > Show Drawing Marker Lines.**

  To modify an illustration:

  - Change its size by clicking and dragging one of the squares on the edges of the illustration.
  - Move it anywhere in the form by clicking and dragging it. If you have a group of shapes on a drawing canvas, they will move together.

- ## Hyperlinks

  ### Hyperlink >

  - **Insert Hyperlink** – With the cursor in the form where you want a hyperlink to appear, choose this option. In the **Hyperlinks** popup that appears, to add a link to a web page or email address:

    1. Enter the text you want to be clickable in the form in **Text to display.**
    2. Enter the destination URL (start with http:// or https://) or email address (start with mailto:) in **Address.**
    3. Check the **Automatically generated bookmarks** box to have MR9 automatically generate bookmarks for the form. [ ]
    4. Click **OK.**

  - **Delete Hyperlink** – Highlight the hyperlink you want to remove, then choose this option.
  - **Edit Hyperlink** – Highlight the hyperlink you want to update, then choose this option. The **Hyperlinks** popup apppears and you can edit any of the fields.

- ## Headers & Footers

  Add headers and/or footers to forms, then customize them.

  - ### Header >
    - **Edit Header** – Select to add/edit content in page headers.
    - **Remove Header** – Select to delete the form's page headers. You don't need to click into the header first to remove it.
  - ### Footer >
    - **Edit Footer** – Select to add/edit content in page footers.
    - **Remove Footer** – Select to delete the form's page footers. You don't need to click into the footer first to remove it.
  - ### Page Number >
    - **Insert Page Number** – Select to add page numbers to the open header or footer where the cursor is placed.
    - **Remove Page Number** – You can only delete page numbers by using this selection. You don't need to highlight the page number first to remove it.

  Format text in the header/footer using Home options. Add merge fields using Data Fields. Customize header and footer placement and treatment in the **Page Layout** tab's **Page Setup** popup. See

- ## Text

  Create text areas in forms that are separate from the regular flow of text in the form, then use Frame Formatting to fine-tune their position and relationship to the rest of the text in the document. See Editing form Frame Formatting options.

  ### Text Frame >

  - **Insert Text Frame** – To create a text box in the form, select this, then click and drag an area for text. Click inside the box on the form to enter your text.
    - **To reposition the frame on the page,** click the frame edge and drag.
    - **To resize the frame,** click and drag one of the squares on the frame edge.
  - **Show Text Frame Marker Lines** – If you have no-line text boxes, select this to see the text box areas on the form.

  You can edit the appearance of text frames using Frame Formatting.

- ## Symbols

  If you want to include text symbols in a form:

Symbol >

- **[Special symbols in a grid]** – Click one of the most-commonly-used symbols to insert it into the form where the cursor is.
- **More symbols** – If you want to use a symbol that doesn't appear in the grid, click this option to open the **Symbol** popup.

Format the appearance of symbols using the character fprmatting tools in Home.

Step-by-step instructions

- Creating/updating forms & letters
- Editing forms & letters
- Editing form File options
- Editing form Home options
- Editing form Insert options
- Editing form Page Layout options
- Editing form View options
- Editing form Data Fields options
- Editing form Table Tools options
- Editing form Frame Formatting options
- Customizing fonts in form templates

Adding custom tables to form templates

If you want to use more options when creating a table than the default **Insert Table** columns/rows selection, use the additional **Insert Table** popup dialog box in form templates.

Continued from Editing form Insert options.

1. In the **Tables** section of the **Insert** tab in a New Form/Edit Form window, click **Insert Table > Insert Table...**
2. In the **Insert Table** popup, make selections:
   - **Table size**

     Highlight the default in a field and type a new number or use the up and down arrows next to the field to increase or decrease the number by 1 each time.

     - **Number of columns** – To change from the default number of columns for the new table.
     - **Number of rows** – To change from the default number of rows for the new table.
   - **Column width**

     Default **Autofit** divides the page width evenly between all of the columns in the table.

     To set a different width for columns, click **Fixed column width,** then highlight the default — which is the **Autofit** measurement — and type a new number or use the up and down arrows next to the field to increase or decrease the number by 1 each time.
   - **Options**

     Check box(es) to add options:

     - **Including Header** – To include a header row in the table.
     - **Allow rows to break across pages** – Default is checked. Uncheck if you want to have the table start on a new page when it is too long to fit in the space available on the current page.
3. Click **OK.** To further format the table, see Editing form Table Tools options.

Step-by-step instructions

- Editing form Insert options
- Editing form Table Tools options
- Creating/updating forms & letters

Editing form Page Layout options

Form Templates' Page Layout options let you set margins, orientation, paper size, columns, content breaks, simple backgrounds, and paragraph spacing.

Use the defaults options in the **Page Layout** tab or you can use the popup dialog box which includes more options to make multiple changes at once. When you click **OK** in the popup, MR9 will update appearance of the page to reflect all of your changes.

Continued from Creating/updating forms & letters.

In the New Form/Edit Form window, click **Page Layout:**

- ## Page Setup
  - ### Margins

    In the **Page Setup** popup that appears, enter amounts in inches or use the arrows to increase/decrease the default amounts for outside margins on pages in the template. You can also enter/select other page options in the popup. Then click **OK.**
  - ### Orientation >
    - **Portrait** – Set page to be taller than wide.
    - **Landscape** – Set page to be wider than tall.
  - ### Size >

    Select a paper size from the dropdown.

  For more options see Customizing page setup in form templates with advanced options.

- ## Columns & Breaks
  - ### Columns >

    Select how many columns of text appear on a page from the default listing. If you want more columns, or to customize the spacing between columns, click **More Columns...** See Customizing page setup in form templates with advanced options.
  - ### Breaks >
    - **Page** – Start a new page where cursor is inserted.
    - **Column** – Start a new column where cursor is inserted.
    - **Text Wrapping** – Start a new line where cursor is inserted.
    - **Next Page** – Start a new page where cursor is inserted. Use this selection, instead of **Page,** when you want to change the number of columns on the next page.

- **Continuous** – Start a new paragraph where cursor is inserted.

- ## Page Background & Frames

  - ### Page Color >

    Select background color in the dropdown for the entire page. If there are multiple pages, every page will have the same background color. To use a custom color, click **More Colors...** in the dropdown. See Customizing colors in form templates.

  - ### Frame >

    Select frame location(s) in the dropdown for the page. Each page can have different frame setups, including no frame.

  - ### Frame Color >

    With frame location(s) selected for the page in **Frame >,** select their color in the default palette. Or to use a custom color, click **More Colors...** in the dropdown. See Customizing colors in form templates.

  - ### Frame Width >

    With frame location(s) selected for the page in **Frame >,** select their line width in the dropdown.

  For more options see Customizing page setup in form templates with advanced options.

- ## Paragraph

  Numbers entered in these fields affect whole paragraphs.

  - ### Indent

    With the paragraph(s) selected that you want to set in from the margin(s), enter amounts in millimeters or use the arrows to increase/decrease the amounts:

    Left – Set the paragraph(s) in from the left margin.

    Right – Set the paragraph(s) in from the right margin.

  - ### Spacing

    With the paragraph(s) selected that you want to give extra space around, enter amounts in millimeters or use the arrows to increase/decrease the amounts:

    Before – Add space above each selected paragraph.

    After – Add space below each selected paragraph.

  For more options see Styling paragraphs in form templates with advanced options.

Step-by-step instructions

- Creating/updating forms & letters

- Customizing page setup in form templates with advanced options
- Customizing colors in form templates
- Styling paragraphs in form templates with advanced options
- Editing form File options
- Editing form Home options
- Editing form Insert options
- Editing form View options
- Editing form Data Fields options
- Editing form Table Tools options
- Editing form Frame Formatting options

Customizing page setup in form templates with advanced options

If the options In the Page Layout tab don't give you enough control, use the **Page Setup** popup dialog box in form templates. It includes additional formatting options for text positioning, spacing, scaling, and other treatments.

Continued from Editing form Page Layout options.

1. In the **Page Setup** section of the **Page Layout** tab in a New Form/Edit Form window, click in the lower right corner.
2. On the **Margins and Paper** tab of the **Page Setup** popup, select options:
   - **Margins**
     - **Top** – Enter a number or use the arrows to increase/decrease the top margin for the page by 10ths of an inch.
     - **Bottom** – Enter a number or use the arrows to increase/decrease the bottom margin for the page by 10ths of an inch.
     - **Left** – Enter a number or use the arrows to increase/decrease the left margin for the page by 10ths of an inch.
     - **Right** – Enter a number or use the arrows to increase/decrease the right margin for the page by 10ths of an inch.
   - **Paper**
     - **Format** – Letter is the default format. Select a paper format in the dropdown.
     - **Width** — If you want a custom paper size, enter a number or use the arrows to increase/decrease the width of the paper by 10ths of an inch.
     - **Height** — If you want a custom paper size, enter a number or use the arrows to increase/decrease the height of the paper by 10ths of an inch.
     - **Portrait** – Click to set page to be taller than wide.
     - **Landscape** – Click to set page to be wider than tall.
   - **Section**
     - **Section start** – Continuous is the default. Changes made on this tab apply to the whole document. If you want the changes you are making to apply to only the page where you opened the popup choose New page in the dropdown.
3. On the **Headers and Footers** tab of the **Page Setup** popup, select options:

- **Design**

  You can either insert headers and footers first or set preferences here and then use **Header > Edit Header/Footer > Edit Footer** in the **Headers & Footers** section of the **Insert** tab. (See Editing form Insert options.)

  - **Header** – None All sections equal All sections different
  - **Header on first page** – Same as other pages All sections equal All sections different
  - **Footer** – Same as other pages All sections equal All sections different
  - **Footer on first page** –
  - **Different header odd and even** – Check the box to have different header layouts on odd vs, even pages.
  - **Different footer odd and even** – Check the box to have different footer layouts on odd vs. even pages.

- **Distance from edge**

  The first page of a form can have a different spacing for its header and footer from the edge of the page from the rest of a form.

  - **Header** – Enter a number or use the arrows to increase/decrease the header's distance from the top edge of the paper by 10ths of an inch.
  - **First page** – Enter a number or use the arrows to increase/decrease the first page's header's distance from the top edge of the paper by 10ths of an inch.
  - **Footer** – Enter a number or use the arrows to increase/decrease the footer's distance from the bottom edge of the paper by 10ths of an inch.
  - **First page** – Enter a number or use the arrows to increase/decrease the first page's footer's distance from the bottom edge of the paper by 10ths of an inch.

4. On the **Columns** tab of the **Page Setup** popup, select options:

- **Number of columns**

  - **One, Two, Three** – Click to select one of the default amounts of columns on a page.
  - **Left** or **Right** – Click one to create a two-column layout with one smaller column either on the left or right of a larger column.
  - **Other** – For a custom amount of columns on a page, type a new number or use the up and down arrows next to the field to increase or decrease the number of columns by 1 each time.

- **Equal column width** divides the page width evenly between all of the columns in the table.

- **Width and spacing**

  Depending on the options chosen under **Number of columns,** default column widths and gutters are assigned to span the width of the page layout which you can adjust by entering a number or use the up/down arrows to change the amount by 10ths of an inch in a **Width** or **Spacing** field.

  - With **Equal column width** checked, changing the value of either a column width or gutter (spacing) will automatically change the corresponding other values so the columns remain within the form's margins.

  - With **Left** or **Right** selected above, changing the width of either or both columns won't change the gutter spacing — only the width of the second column will automatically adjust so the columns remain within the margins.

- **Line between**

  Default is None. To add a vertical line between columns, select Single in the dropdown, then select options:

  - **Width** – Enter a number or use the up/down arrows to change the thickness of the frame line(s) by quarters of a point.

  - **Color** – Select one of the default colors in the **Color** dropdown for the line. To use a custom color, click **Other** and designate a color in the **Color** popup. See Customizing colors in form templates.

5. On the **Frames** tab of the **Page Setup** popup, select options:

   - **Frame**

     1. Select a border location by clicking its button — the frame image displays the current choice:

        - **None** – Remove any applied borders.

        - **Top** – Place a border on the top side of the page's text area.

        - **Bottom** – Place a border on the bottom side of the page's text area.

        - **Box** – Place a border on all sides of the page's text area.

     2. With a frame option selected, you can make additional choices:

        - **Line width** – Enter a number or use the up/down arrows to change the thickness of the frame line(s) by quarters of a point.

        - **Line color** – Select one of the default colors in the **Color** dropdown for the

frame. To use a custom color, click **Other** and designate a color in the **Frame Line Color** popup. See Customizing colors in form templates.

- **Distances and Options**
  - **Top** – Enter a number or use the arrows to increase/decrease the space from the top border on the page by 10ths of an inch.
  - **Bottom** – Enter a number or use the arrows to increase/decrease the space from the bottom border on the page by 10ths of an inch.
  - **Left** – Enter a number or use the arrows to increase/decrease the space from the left border on the page by 10ths of an inch.
  - **Right** – Enter a number or use the arrows to increase/decrease the space from the right border on the page by 10ths of an inch.
  - Measure from

6. On any tab in the **Page Setup** popup, click the **Apply** dropdown to choose where the changes you made in the popup apply in the form:
   - **Whole document** — Default. Changes apply to all pages in the form.
   - **Section** – Changes apply to the page where you opened the popup.
7. Click **OK.**

Step-by-step instructions

- Creating/updating forms & letters
- Editing form Page Layout options
- Editing form Insert options
- Customizing colors in form templates

Editing form View options

Form Templates' View options let you change your workspace view options — such as zoom in, use rulers, or show invisible characters.

Continued from Creating/updating forms & letters.

In the New Form/Edit Form window, click **View:**

- **Zoom**
  - **Zoom >**
    Select a percentage in the dropdown to zoom in or out on the form.
  - **100%**
    Click to instantly zoom to 100% view.
  - **Full Page**
    Click to instantly zoom to fit a single page in the view.
  - **Page Width**
    Click to instantly zoom to fit the width of the page in the view.
  - **Text Width**
    Click to instantly zoom to fit the width of the widest contents on the form in the view.
- **Toolbars**
  - **Horizontal Ruler**
    Click to toggle ruler along top of form on and off.
  - **Vertical Ruler**
    Click to toggle ruler along left side of form on and off.
  - **Status Bar**
    Click to toggle status bar along bottom of form on and off.
- **Show**
  - **Table Gridlines**
    Click to toggle table row and column outlines in form on and off.

- **Textframe Marker Lines**

  Click to toggle text box outlines in form on and off.

- **Drawing Marker Lines**

  Click to toggle drawing area outlines in form on and off.

- **Control Characters**

  Click to toggle hidden characters in form on and off.

- **Frame Anchors**

  Click to toggle a selected shape or text frame’s anchor control character on and off. See Editing form Insert options.

Step-by-step instructions

- Creating/updating forms & letters
- Editing form File options
- Editing form Home options
- Editing form Insert options
- Editing form Page Layout options
- Editing form Data Fields options
- Editing form Table Tools options
- Editing form Frame Formatting options

Editing form Table Tools options

If your form has tables in it, use Form Templates' Table Tools options to customize the look of the tables in your forms.

Continued from Creating/updating forms & letters or Adding custom tables to form templates.

In the New Form/Edit Form window, click inside a table you want to customize, then click **Table Tools:**

- **Table**
  - **Select >**

    To format/edit an entire selection.
    - **Select Cell** – a single cell and its contents.
    - **Select Column** – one column and its contents.
    - **Select Row** – one row and its contents.
    - **Select Table** – the entire table and its contents.
  - **View Gridlines**

    Toggle between visible and invisible cell outlines. Default is visible.
  - **Properties**

    In the **Table Properties** popup that appears, make frame and background selections, and enter amounts or use the arrows to increase/decrease the default amounts for line widths and cell margins in the selected table. You can also enter/select other table formatting options in the popup. Then click **OK.**
- **Rows & Columns**
  - **Delete >**

    To delete an entire selection.
    - **Delete Cell >**

      Choose how to delete a single cell and its contents:

      Move cells to the left – Only the cell and its contents are deleted. Existing cells on the right move over, and the row becomes a separate table with one less column.

      Delete whole row – The entire row that includes the selected cell is deleted.

      Delete whole column – The entire column that includes the selected cell is deleted.

- **Delete Column** – One column and its contents.
- **Delete Row** – One row and its contents.
- **Delete Table** – The entire table and its contents.

- **Insert Above**

  Add one row above the selected cell.

- **Insert Below**

  Add one row below the selected cell.

- **Insert Left**

  Add one column to the left of the selected cell. If the table fills the width of the page, the table's column widths automatically adjust to fit the additional column into the table.

- **Insert Right**

  Add one column to the right of the selected cell. If the table fills the width of the page, the table's column widths automatically adjust to fit the additional column into the table.

Merge

- **Merge Cells**

  Combine selected cells into one cell.

- **Split Cells**

  Replace a merged cell with its original individual cells.

- **Split Table >**

  Above – Separate a table into 2 tables; row where cursor is placed becomes the top row of the second table.

  Below – Separate a table into 2 tables; row where cursor is placed becomes the bottom row of the first table.

Frames & Background

- **Frames >**

  Select frame location(s in the dropdown for the selected cell(s/row(s/column(s/table.

- **Line Color >**

  With frame location(s) selected in **Frames >,** select their color in the default palette. Or to use a custom color, click **More Colors...** in the dropdown; then select/enter values for a custom color in the **Frame Line Color** popup and click **OK.**

- **Background Color >**

  Select background color in the dropdown for the selected table areas. To use a custom color, click **More Colors...** in the dropdown; then select/enter values for a custom color in the **Background Color** popup and click **OK.**

- **Line Width >**

  With frame location(s) selected in **Frames >,** select their line width in the dropdown.

- **Alignment**

  Click one of the buttons to change how text in the selected cells in a table lines up horizontally and vertically.

TIP: Change several options at once

In any section of the tool bar that has in the lower right corner, click it to access a dialog box of options. You can change multiple related options at once in the popup, then click **OK** to save your changes.

Step-by-step instructions

- Creating/updating forms & letters
- Adding custom tables to form templates
- Editing form File options
- Editing form Home options
- Editing form Insert options
- Editing form Page Layout options
- Editing form View options
- Editing form Data Fields options
- Editing form Frame Formatting options

Editing form Frame Formatting options

If your form has graphics in it — such as your company logo — or simple shapes inserted — such as boxes and circles — use Form Templates' Frame Formatting options to customize how the graphics look and interact with the rest of the content in your forms. You can also format text frames in form templates with similiar options.

Use the defaults options in the Frame Formatting tab or you can use the popup dialog box which includes more options to make multiple changes at once. When you click **OK** in the popup, MR9 will update appearance of the illustration/text frame to reflect all of your changes.

Continued from Creating/updating forms & letters and Editing form Insert options.

1. In the New Form/Edit Form window, To:
   - **Add a frame to an illustration** (image or shape) – Click the image or shape in the form template.
   - **Customize a text frame** – Click the frame edge.
2. Click **Frame Formatting.**
3. In the **Frame Formatting** tab, use these options:

- **Arrange**
  - **Wrap Text >**
    - **In Line with Text** – Moves the illustration/text frame to the left of the column, lines up the bottom of the illustration/text frame with the baseline of the first line of the closest paragraph, and indents the first line of the paragraph to the right side of the illustration/text frame.
    - **Top and Bottom** – Illustration/text frame remains where it was placed, any text that overlaps it is moved below the illustration/text frame.
    - **Square** – Illustration/text frame remains where it was placed, any text that overlaps it is moved to the left, right and below the illustration/text frame to frame it on all sides.
    - **Behind Text** – Illustration/text frame remains where it was placed, any text that overlaps it is moved in front of the illustration/text frame.
    - **In Front of Text** – Illustration/text frame moves in front of any text that overlaps it.
    - **More Layout Options** – In the **Drawing Layout** popup that appears,

select/enter values to customize the illustration's positioning and alignment. You can also enter/select other illustration options in the popup. See Customizing illustration frame formatting.

- **Bring to Front >**
  - **Bring to Front** – Move selected illustration to the top layer of the template.
  - **Bring Forward** – Move selected illustration to the next highest layer of the template.
  - **Bring in Front of Text** – Move selected illustration to the layer above the text layer.
- **Send to Back >**
  - **Send to Back** – Move selected illustration to the bottom layer of the template.
  - **Send Backward** – Move selected illustration to the next lower layer of the template.
  - **Send Behind Text** – Move selected illustration to the layer below the text layer.
- **Position >**
  - **Left –** Have selected illustration line up on left margin.
  - **Center** – Have selected illustration align to a midpoint.
  - **Right** – Have selected illustration line up on right margin.
  - **Other Position** – To set a fixed or absolute position for the illustration. For more options, use the formatting popup. See Customizing frame layouts.

- **Size**
  - **Height:**

    With the illustration selected that you want to change its height, enter amounts in millimeters or use the arrows to increase/decrease the amounts.
  - **Width:**

    With the illustration selected that you want to change its width, enter amounts in millimeters or use the arrows to increase/decrease the amounts.

  For more options, use the formatting popup. See Customizing frame layouts.

- **Frames & Background**

  (For shape illustrations and text frames only)

- **Line Color/Border Color**

  With the shape/text frame selected, select their outline color in the default palette. Or to use a custom color, click **More Colors...** in the dropdown; then click **Other** in the popup. See Customizing colors in form templates.

- **Background Color**

  With the shape/text frame selected, select their fill color in the default palette. Or to use a custom color, click **More Colors...** in the dropdown; then click **Other** in the popup. See Customizing colors in form templates.

- **Line Width/Border Width**

  With the shape/text frame selected, select their outline width in the dropdown. Plus for text frames you can select:

  - **No Frame Line** for a text box without an outline.
  - **Single Frame Line** (default) for a simple outline in the line width selected.
  - **Double Frame Line** for a double line border in the line width selected.

- **Transparency**

  With the shape/text frame selected, select an amount of transparency in the dropdown for the background color.

For more options, use the formatting popup. See Customizing frame layouts.

TIP: Change several options at once
In any section of the tool bar that has in the lower right corner, click it to access a dialog box of options. You can change multiple related options at once in the popup, then click **OK** to save your changes.

Step-by-step instructions

- Creating/updating forms & letters
- Editing form File options
- Editing form Home options
- Editing form Insert options
- Editing form Page Layout options
- Editing form View options
- Editing form Data Fields options
- Editing form Table Tools options
- Customizing frame layouts
- Customizing colors in form templates

Customizing frame layouts

If you want to use more options when formatting illustration and text frames than the defaults in the **Frame Formatting** tab, use the options in the **Drawing Layout** and **Text Frame Attribute** popup dialog boxes in form templates.

Continued from Editing form Frame Formatting options.

1. With either an illustration or text frame selected, click the **Frame Formatting** tab in a New Form/Edit Form window.
2. With the illustration or text frame still selected, click in the lower right corner of the **Arrange, Size,** or **Frames & Background** section.

- ## Arrange
  - In the **Drawing Layout/Text Frame Attributes** popup on the **Layout and Position** tab, make selections:
    - ### Wrapping Style
      - **In-Line** – Moves the selected object to the left of the column, lines up the bottom of the selected object with the baseline of the first line of the closest paragraph, and indents the first line of the paragraph to the right side of the selected object.
      - **Top and Bottom** – Selected object remains where it was placed, any text that overlaps it is moved below the selected object.
      - **Square** – Selected object remains where it was placed, any text that overlaps it is moved to the left, right and below the selected objectto frame it on all sides.
      - **Behind** – Selected object remains where it was placed, any text that overlaps it is moved in front of theselected object.
      - **In Front** – Selected object moves in front of any text that overlaps it.
    - ### Position Style
      - **Move object with text** – Selected object is linked to text and moves up and down the page in tandem with the text.
      - **Fixed Position on Page** – Selected object is static — it doesn't move if its anchor text moves.

- ### Horizontal Alignment
  - Click a radio button for how the selected object aligns horizontally on the page:
    - **Left** – Selected object lines up on left margin.
    - **Center** –Selected object aligns to the page's midpoint.
    - **Right** – Selected object lines up on right margin.
    - **Other Position** – Works with **Absolute Position.**
  - **Absolute Position** – With **Other Position** selected above, enter a number or use the arrows to increase/decrease the distance of the selected object to the left margin.
- ### Vertical Alignment

  Enter a number or use the arrows to increase/decrease the amount for how far below its anchor paragraph the selected object is placed on the page.

Size and Distance

- ### Size
  - **Height** — Enter a number or use the arrows to increase/decrease the absolute height of the selected object by 10ths of an inch.
  - **Width** — Enter a number or use the arrows to increase/decrease the absolute width of the selected object by 10ths of an inch.
- ### Scale
  - **Height** — Enter a number or use the arrows to increase/decrease the height of the selected object by a percentage of its current size.
  - **Width** — Enter a number or use the arrows to increase/decrease the width of the selected object by a percentage of its current size.
- ### Distance from text
  - **Top** – Enter a number or use the arrows to increase/decrease the top margin between the selected object and text in the form by 10ths of an inch.
  - **Left** – Enter a number or use the arrows to increase/decrease the left margin between the selected object and text in the form by 10ths of an inch.
  - **Bottom** – Enter a number or use the arrows to increase/decrease the bottom margin between the selected object and text in the form by 10ths of an inch.

- **Right** – Enter a number or use the arrows to increase/decrease the rightmargin between the selected object and text in the form by 10ths of an inch.

- ### Options

  - **Moveable with the mouse** — Default. Uncheck the box if you don't want to be able to click and drag the selected object around the form.

  - **Sizeable with the mouse** — Default. Uncheck the box if you don't want to be able to click and drag the selected object to resize it.

- ## Outline and Fill

  In Drawing Layout popup only

  - ### Fill

    - **Color** – Select one of the default colors in the dropdown to fill the illustration. To use a custom color, click **Other** and designate a color in the **Color** popup. See Customizing colors in form templates.

    - **Transparency** – Enter a number or use the arrows to increase/decrease the transparency of the illustration by a percentage.

  - ### Outline

    - **Color** – Select one of the default colors in the dropdown for an outline around the illustration. To use a custom color, click **Other** and designate a color in the **Color** popup. See Customizing colors in form templates.

    - **Line width** – Enter a number or use the arrows to increase/decrease the width of an outline for the illustration by 10ths of an inch.

  - ### Appearance

    - **Rotation** – Enter a number or use the arrows to increase/decrease the rotation of the illustration by degrees.

    - **Flip** – Check **Horizontal** to have the illustration flipped across a vertical axis. Check **Vertical** to have the illustration flipped across a horizontal axis.

- ## Frame and Color

  In Text Frame Attributes popup only

  - ### Background

    - **Color** – Select one of the default colors in the dropdown for the text frame's background. To use a custom color, click **Other** and designate a color in the **Color** popup. See Customizing colors in form templates.

- **Transparency** – Enter a number or use the arrows to increase/decrease the transparency of the text frame's background by a percentage.

- ### Frame Line

  - **Width** – Enter a number or use the arrows to increase/decrease the width of a border for the text frame by quarters of a point.

  - **Line**

    - **without** – For no outline.

    - **single** (default) – For a simple outline in the line width selected.

    - **doubled** – For a double line border in the line width selected.

  - **Color** – Select one of the default colors in the dropdown for the text frame's border. To use a custom color, click **Other** and designate a color in the **Color** popup. See Customizing colors in form templates.

- ### Internal Margin

  - **Top** – Enter a number or use the arrows to increase/decrease the top margin for text inside the text frame by 10ths of an inch.

  - **Left** – Enter a number or use the arrows to increase/decrease the left margin for text inside the text frame by 10ths of an inch.

  - **Bottom** – Enter a number or use the arrows to increase/decrease the bottom margin for text inside the text frame by 10ths of an inch.

  - **Right** – Enter a number or use the arrows to increase/decrease the right margin for text inside the text frame by 10ths of an inch.

3. Click **OK.**

Step-by-step instructions

- Editing form Frame Formatting options
- Editing form Insert options
- Creating/updating forms & letters
- Customizing colors in form templates

Modifying data maps

Some form templates, such as federal subpoenas, are uneditable in MR9 because the government has stringent formatting requirements for their forms. If you alter the formatting, the forms are invalid. You can however update what kind of data populates the data fields.

Continued from Creating/updating forms & letters.

1. The View Form window for a federal subpoena includes a simple toolbar in the header and a **Datamap** panel listing the data fields on the form and the data types included in each field. To update the information in the data fields, click **Edit.**
2. In the Edit Form window for a federal subpoena, the form is not editable. Only the **Field Data** in the **Datamap** panel is editable.
3. Use the tools in the header to page through the form, use the thumbnail menu to navigate, zoom in or out, pan, print, download, and search the text. (Search is case sensitive.)

4. To update a data field in the form, click its hyperlinked **Field Name** in the **Datamap** panel.
5. In the **Edit Datamap** panel, **Field Name** is uneditable. To:
   - **Add data fields** – Click **> [category] > [data field]** in **Field Data** and select an MR9 data field to include in the federal form's data field.
   - **Add text** – Click in **Field Data** where you want the text, then enter the text.
   - **Delete data fields** – Highlight the field(s) in **Field Data** you want to delete, then press **Delete** on your keyboard.
   - **Edit text** – Highlight the text in **Field Data**, then delete it or type over it.
6. Click **Save** in the **Edit Datamap** panel, then click **Save** in the Edit Form window.

Reference

- Form Templates
- Form Types and Groups

Step-by-step instructions

- Creating/updating forms & letters

Creating .label templates

If you have the discontinued DYMO Label Web Service already installed on your computer, you can create .label templates to use with your DYMO printer.

Continued from Creating DYMO label templates.

1. Launch the DYMO software.
2. In the Design and Print Labels window, click **Labels.**
3. Select the label type for your template by clicking the label graphic that matches the dimensions and set-up of the DYMO labels you want to print.
4. Different layout styles appear in the **Select Layout** pane. Click the option that works best for you, or select the blank option at the bottom to create your template from scratch.
5. The label selected appears on the right side of the screen. To:
   - **Edit or add text to existing label fields:** Click in the field and highlight text to change if necessary, then enter text.
   - **Delete a label field:** Click anywhere inside the field to select it, then click **Edit > Delete** or press **Delete** on your keyboard.
   - **Add custom text or images, such as your company logo:** Click **Insert** at the top-left of the window, then double-click an item in the **Label Objects** list or drag it over to the label to add it to the template.

     ### TIP: Adding your company logo to a template

     To customize a label template with your company logo, left-click **Image** in the **Label Objects** list and hold the button down on your mouse. Then drag it onto the label template on the right of the screen and release. The **Image Object Properties** window appears. For **Image source** selection, check **File,** then click **Browse.** Select your logo and click **Open.** You will then see a preview of the logo you selected. Click **OK** to add the logo. Once the logo is added to the label, you can resize it by using your left mouse button to click on one of the squares and drag the logo to the desired size.
6. Check that your template will work with MR9. If you are using a:
   - **Default label style:** Right-click the [address] field **> Properties.** In the **Address Object Properties** window, click the **Advanced** tab. The word, Address, should appear in the **Reference name** field. "Address" is the link to have MR9 merge the address onto the label.

- **Blank label style:** If you are adding your own text box instead of using a predefined layout/address field, be sure you add the word, Address, to the **Object Properties** of the text box you create.

7. When you're done creating the label template, click **File > Save As** to save it on your computer. Remember where you saved the file so you can find it to add to your MR9 Label Templates function. To upload your label template to MR9, see Managing label templates.

Reference

- Labels
- DYMO

Step-by-step instructions

- Setting up for online label printing
- Creating DYMO label templates
- Managing label templates

Creating .dymo templates

If you have installed the DYMO Connect application on your computer (see Setting up for online label printing), you can create label templates with the .dymo extension.

Continued from Creating DYMO label templates.

1. Launch DYMO Connect, and click **New.**

   NOTE: Check that you have the latest DYMO software

   Creating .dymo templates for MR9 requires DYMO Connect v1.4.4.17 or higher.

2. In the **Printer** field, select your printer in the dropdown (if it doesn't appear, click **Don't see your printer?** and follow the troubleshooting instructions).

3. Select the **Label Type** for your template by clicking the field's dropdown, then selecting the label option that matches the dimensions and set-up of the DYMO labels you want to print.

4. Click:

   - The label type you want to use in the **Templates** pane, then click one of the different layout styles that appear in the main area. (Click on any template to see a zoomed-in version of the label style.)

   - The blank option at the bottom to create your template from scratch.

5. Click **Open.**

6. The label selected appears on the right side of the screen. The only required field you need to include for your labels to work in MR9 is the **Address** field. If the template you are using does not already include an **Address** field, click **Add > Address.**

7. You can customize the look of your label templates. To:

   - **Edit or add text to existing label fields:** Click in the field and highlight text to change if necessary, then enter text. You can style the text's appearance using the Format and Layout dropdown panels on the left side of the screen.

   - **Delete a label field:** Click anywhere inside the field to select it, then click **Edit > Delete object** or press **Delete** on your keyboard.

   - **Add custom text or images, such as your company logo:** Click **Add** at the top-left of the window, then select the item you want in the dropdown.

     TIP: Adding your company logo to a template

     To customize a label template with your company logo, select **Image** in the **Add**

dropdown. In the **Image** panel, click **Browse.** Select your logo file on your computer. You will see a preview of the logo you selected. Click **Open** to add the logo. Once the logo is added to the label, you can resize it by clicking and dragging on one of the squares around the logo to the desired size. To position your logo on the label, click and drag in the middle of the logo itself.

8. Check that your template will work with MR9:
    1. Click •••
    2. All objects included in the label appear. Under **Objects,** check the **AddressObject0** box.
    3. Change "AddressObject0" to "Address".
9. When you're done creating the label template, click **Save** to save it on your computer. Remember where you saved the file so you can find it to add to your MR9 Label Templates function. To upload your label template to MR9, see Managing label templates.

Reference

- Labels
- DYMO

Step-by-step instructions

- Setting up for online label printing
- Creating DYMO label templates
- Managing label templates

Downloading backup files of your database

If you want to have a backup file of your MR9 database onsite you can download a backup file from up to 7 days in the past. The file naming convention is: DatabaseName_YYYYMMDD_hhmm.BAK.

1. **Tools > Download Backup Files**
2. In the Download Backup Files window, backups from the last 7 days are listed along with their file size. Click the radio button for the backup you want to save then click **Download.**
3. MR9 downloads the file to your device. If you want to save multiple backups repeat step 2 for each file.

NOTE: Onsite backup files are for policy compliance only

MR9 includes a better-than-backup system that stores your database on several servers simultaneously in the cloud so there is no need for your own backups for recovery purposes. However if you need or want backups to comply with your company security policies, you can use this function to download a copy of your MR9 database backup to store on your premises.

Database

A **database** is a place where organized information is stored for a purpose. There are many types of databases; MR9 uses a relational database. Relational databases store and display data in a tabular format of rows and columns, like a spreadsheet.

TIP: Think of a database like a filing cabinet

A relational database is structured much like a manual filing system:

- The "filing cabinet," which contains all of the data we want, is called a **database.**
- Each of the "drawers" in the filing cabinet is called a **table.** A table stores a specific set of information — there's one table for firms, another table for contacts, and another table for locations, for example.
- The "sheets of paper" stored in folders in the filing cabinet are called **records.** So the Firm table would have a record for each law firm, listing their name, address, etc.
- The individual entries on the sheets of paper (name, address, etc.) are called **fields.**

These components form the core of a relational database.

Reference

- SQL

Step-by-step instructions

- Creating custom reports

SQL

Structured Query Language, or **SQL** (pronounced as the letters S-Q-L or the word *sequel)* is a language for communicating with databases, so you can quickly and easily retrieve all of the valuable information stored inside a database.

NOTE: SQL is used in MR9

Common requests for information in MR9 are built in and triggered by entering text and/or clicking buttons in the different windows in MR9. You don't need to know SQL for most information retrieval in MR9. You can make customized searches of your MR9 database, however, using Query Maker's SQL wizard.

To ask MR9's database engine to find something, we construct an **SQL statement:** a string of SQL keywords and supplementary information (such as table and field names) that the database engine understands.

Database tables usually contain large amounts of data, and you seldom need to retrieve all the rows in a table. Usually, you only want the particular data needed for specific operations or reports. Retrieving just the data you want involves specifying **search criteria,** also known as a filter condition, in SQL.

Reference

- Database

Step-by-step instructions

- Creating custom reports

Operators

Query Maker uses **operators** — filters you apply to fields in your database — to find specific information. Operators included in Query Maker:

- is equal to
- is not equal to
- contains
- starts with

Reference

- Database
- SQL

Step-by-step instructions

- Creating custom reports

Query Gallery

Instead of creating a report from scratch in Query Maker, download one of the SQL queries published by MR9 developers to customize or use as is.

Reference

- SQL

Step-by-step instructions

- Using published queries

Data Reader

If MR9 does not include a report you need, you can create your own in Query Maker but are limited to simple, mostly single-table reports unless you add the **Data Reader** plug-in. This is due to security issues with directly connecting to MR9 databases in the cloud. Data Reader creates a dedicated connection to your MR9 database in the cloud so you can use your information in your own custom reports or other applications.

Reference

- Query Maker
- Database

Step-by-step instructions

- Creating custom reports

Setting multiple query conditions

If you need more targeted results than a single-condition query provides, you can set up multiple conditions in one query to find the exact results you want. Use parentheses to group conditions. For example to find law firms in Texas or Louisiana, you can query: (State is equal to TX OR State is equal to LA) AND FirmType is equal to Law Firm.

Continued from Creating custom reports.

1. With the query you want to refine set up in **Tools > Query Maker**, click **> Add New Condition.**
2. In the **AND/OR** column, AND appears as the default:
   - **AND**

     Select this operator to tell the database to retrieve only those records matching both/all of the specified conditions.
   - **OR**

     Select this operator to tell the database to retrieve records matching either of the specified conditions.
3. Repeat step 2 to add additional query conditions.
4. To group conditions to give them priority in executing the query click ▾ in the **(** column of the first of the priority conditions and selecting (in the dropdown. Then click ▾ in the **)** column of the last of the priority conditions and select) in the dropdown.
5. Click **Execute.** MR9 returns the results of your query. To:
   - **Export your report** to *Excel* or a generic CSV (comma separated values) file, see Exporting & printing results.
   - **Remove a condition,** click the condition's **> Delete.**
   - **Save your query** to re-use later, see Saving queries.

Reference

- Database
- SQL
- Operators

Step-by-step instructions

- Creating custom reports
- Exporting & printing results
- Saving queries

Saving queries

Instead of re-typing a standard query each time you use it, save it in Query Maker. Both conditions and appearance will be saved for later reuse. You can update the query as needed. You can also share saved queries with other users in your company.

Continued from Creating custom reports.

1. With the query you want to reuse open in **Tools > Query Maker**, click **Save.**
2. In the **Save Query** popup, type a name for the query in the ***Query Name** field **(required).**
3. If you would like to give other users in your company access to the query, check the **Share with other users** box.
4. Click **Save.** The saved query name appears in the **Query Name** field. To:
   - **Use a saved query,** see Using previously-saved queries.
   - **Manage the query,** including its properties, see Managing queries.

Reference

- Database
- SQL

Step-by-step instructions

- Creating custom reports
- Using previously-saved queries
- Managing queries

Using previously-saved queries

Save time and reduce errors by re-using queries you and other MR9 users in your company created and saved in Query Maker. You can update queries as needed, and save time by creating new queries from existing ones.

1. **Tools > Query Maker**
2. In the Query Maker window, click **Open.**
3. In the Open Query window, click the hyperlinked **Query Name** of the query you want to use.
4. Edit the query if needed (see Creating custom reports), then click **Execute.** To:
   - **Export your report** to *Excel* or as a generic CSV (comma separated values) file, see Exporting & printing results.
   - **Save your updated query,** click **Save.**
   - **Save as a new query** and leave the existing query unchanged, click **Copy & New.** Then save with a new name. See Saving queries.

TIP: Start with a published query

In addition to in-house queries, you can download a query created by MR9 staff from the Query Gallery. You can use these published queries as is, or edit them to fit your needs. See Using published queries.

Reference

- Query Gallery

Step-by-step instructions

- Creating custom reports
- Exporting & printing results
- Saving queries
- Using published queries

Using published queries

You don't have to start from scratch to generate reports. Save time by using queries made by MR9 staff. You can customize the queries as needed.

1. **Tools > Query Maker**
2. In the Query Maker window, click **Query Gallery.**
3. In the Query Gallery window, all queries in the current library are listed. To find a query you want to use, use the **Search By** pane:
   - **Query No.**

     Enter the query's number, if for example, OMTI Support gave you the number of a recommended query.
   - **Table Name**

     Enter the name of the table you want to perform queries on.
   - **Query Name**

     Enter the query's name, if for example, OMTI Support gave you the name of a recommended query.
4. Click . In the results returned, click **> Download** next to the number of the query you want to use in Query Maker.
5. In the **Save Query** popup, you can edit ***Query Name,** but you can't leave it blank.
6. Check the **Share with other users** box if you want to share the query in-house.
7. Click **Save,** then click **Close** in the Query Gallery window.
8. To use the downloaded query, see Using previously-saved queries.

Reference

- Query Gallery

Step-by-step instructions

- Using previously-saved queries

Managing queries

You can change query names, update sharing, or delete queries.

Continued from Saving queries.

1. With the query you want to manage open in **Tools > Query Maker**, click .
2. In the **Edit Query Properties** popup, you can change the query name and turn in-house sharing on or off. See Saving queries.
3. To remove the query altogether, click **Delete.**

Reference

- Database
- SQL

Step-by-step instructions

- Saving queries
- Using previously-saved queries

Importing entities into *QuickBooks*

Instead of entering contacts (customers in *QuickBooks)* and locations (vendors in *QuickBooks)* into both MR9 and *QuickBooks,* enter them once in MR9, then use QuickBooks Integrator to copy them into *QuickBooks.*

1. Launch your *QuickBooks* and have the right company file open.
2. **Tools > QuickBooks Integrator**
3. In the **Search By** pane, specify the following filters:
   - **QuickBooks Data**
     Default is Customers. Select Customers to import contacts or Vendors to import custodians/locations in the dropdown.
   - ***Entered Date From/*Entered Date To**
     Required. Default is today. Enter a date range.
4. Click . MR9 lists all of the entities that meet the search criteria.
5. Check boxes to select entities.
6. Choose **Import to QuickBooks.**

IMPORTANT: Always open QuickBooks & company file before importing

Having *QuickBooks* and/or the company file closed when you attempt to connect will drastically increase the amount of time taken when importing data to *QuickBooks*(over 300%). It can also cause errors.

It is possible to connect with these closed, however all requests to the company file must first go through *QuickBooks,* which means *QuickBooks* must be launched in the background for each query. It will always be fastest to connect with *QuickBooks* already running.

Reference

- Results pane

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with MR9
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Importing checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Importing invoices into *QuickBooks*

There are several reasons to import your MR9 invoices into *QuickBooks.*

- If you operate multiple businesses and use *QuickBooks* to generate invoices for a business other than records retrieval (e.g., a staffing business), you can import MR9 invoices into *QuickBooks* to run consolidated income statements.
- If you keep track of deposits with *QuickBooks,* you can eliminate duplicate entries of invoices and payments by importing that information directly from MR9.
- You can reprint MR9 invoices in *QuickBooks* format, if needed.

1. Launch your *QuickBooks* and have the right company file open.
2. **Tools > QuickBooks Integrator**
3. In the **Search By** pane, specify the following filters:
   - **QuickBooks Data**
     Select Invoices in the dropdown.
   - ***Post Date From/*Post DateTo**
     Required. Default is today. Enter a different invoice post date or date range (up tp 7 days), if desired.
   - **Business Units**
     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to invoices tied to specific BUs. See Lookup panel.
4. Click . MR9 lists all of the invoices posted in the specified period along with information about the clients.
5. Check boxes to select invoices.
6. Choose **Import to QuickBooks.**

IMPORTANT: Always open *QuickBooks* & company file before importing

Having *QuickBooks* and/or the company file closed when you attempt to connect will drastically increase the amount of time taken when importing data to *QuickBooks*(over 300%). It can also cause errors.

It is possible to connect with these closed, however all requests to the company file must first go through *QuickBooks,* which means *QuickBooks* must be launched in the background for each query. It will always be fastest to connect with *QuickBooks* already running.

NOTE: MR9 fills in *QuickBooks* data

MR9 automatically generates any missing data in *QuickBooks* (such as customers, chart of accounts, or items) as invoices are imported. You do not have to worry about importing all of the supporting data for invoices one at a time.

Reference

- QuickBooks preferences
- Lookup panel
- Business Units
- Results pane

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with MR9
- Importing entities into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Importing checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Importing checks into *QuickBooks*

Instead of printing checks directly from MR9, have *QuickBooks* print them and deduct the amounts from your checking account since reconciling your bank account can only be done in *QuickBooks.*

1. Launch your *QuickBooks* and have the right company file open.
2. **Tools > QuickBooks Integrator**
3. In the **Search By** pane, specify the following filters:
   - **QuickBooks Data**
     Select Checks in the dropdown.
   - ***Check Date From/*Check Date To**
     Required. Default is today. Enter a different pay date or date range (up to 7 days), if desired.
4. Click . MR9 lists all of the custodians being paid in the specified period along with their check numbers and amounts.
5. Check boxes to select custodians.
6. Choose **Import to QuickBooks.**
7. In the **Memo for Check** popup that appears, enter the common text that will appear in the **Memo** field on each check. Click **OK.**

IMPORTANT: Always open QuickBooks & company file before importing

Having *QuickBooks* and/or the company file closed when you attempt to connect will drastically increase the amount of time taken when importing data to *QuickBooks* (over 300%). It can also cause errors.

It is possible to connect with these closed, however all requests to the company file must first go through *QuickBooks,* which means *QuickBooks* must be launched in the background for each query. It will always be fastest to connect with *QuickBooks* already running.

NOTE: MR9 fills in *QuickBooks* data

MR9 automatically generates any missing data in *QuickBooks* (such as vendors) as checks are imported. You do not have to worry about importing all of the supporting data for checks one at a time.

Reference

- Results pane

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with MR9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Importing payments into *QuickBooks*

Instead of recording deposits manually in *QuickBooks,* you can import payment transactions directly from MR9, including payment processing fees and surcharges. However, you must set up your business units' financial accounts first, then import invoices before you can import payments since payments are applied to invoices in *QuickBooks.* (See Importing invoices into *QuickBooks.)*

1. Launch your *QuickBooks* and have the right company file open.
2. **Tools > QuickBooks Integrator**
3. In the **Search By** pane, specify the following filters:
   - **QuickBooks Data**
     Select Receive Payments in the dropdown.
   - ***Post Date From/*Post DateTo**
     Required. Default is today. Enter the date or date range (up tp 7 days) payments were posted.
4. Click . MR9 lists all of the payments posted in the specified period along with information about their related invoice and client.
5. Check boxes to select payments.
6. Choose **Import to QuickBooks.**

IMPORTANT: Always open QuickBooks & company file before importing

Having *QuickBooks* and/or the company file closed when you attempt to connect will drastically increase the amount of time taken when importing data to *QuickBooks*(over 300%). It can also cause errors.

It is possible to connect with these closed, however all requests to the company file must first go through *QuickBooks,* which means *QuickBooks* must be launched in the background for each query. It will always be fastest to connect with *QuickBooks* already running.

Reference

- Results pane

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with MR9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*

- Importing checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator
- Selecting BU financial accounts

Troubleshooting QuickBooks Integrator

If you encounter problems importing MR9 data into *QuickBooks,* check this list for possible remedies.

- ## Importing MR9 data is slow

  1. ### Check that you have both *QuickBooks* & the company file open before importing data.

     If you attempt to use QuickBooks Integrator without *QuickBooks* and/or the company file open, import time is drastically increased because all requests to the company file go through *QuickBooks* meaning *QuickBooks* must be launched in the background for each query. Importing data is over 300% slower if you do not open *QuickBooks* first.

  2. ### Enable persistent connections

     1. Open Remote Connector for QuickBooks.
     2. In the Remote Connector for QuickBooks screen, click the **Advanced** tab.
     3. Check the **Enable Persistent Connection** box in the **Connection Settings** section.

     Normally the remote connection closes between requests, which can slow down information importing and cause errors. If you check this option, you reuse the same connection to *QuickBooks* for all of the imported MR9 data during a single session, saving time between requests made in short succession.

- ## "QuickBooks already has a company file open. If you want to open another company file, close this one first..." error

  If you do not open *QuickBooks* before importing data from MR9, Remote Connector launches a processor of *QuickBooks* (qbw32.exe) in the background. When importing is done, the processor should be closed. However, Windows doesn't allow this. If you get this error, launch Windows Task Manager and kill the qbw32.exe.

  To avoid this, before using QuickBooks Integrator, launch *QuickBooks* first.

Reference

- QuickBooks preferences

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with MR9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing checks into *QuickBooks*

Entering general firm information

Enter basic firm information, including contact information and important warnings.

Continued from Adding firms to MR9 or Updating firms.

1. In the **General** pane of an Edit Firm window, enter text or make selections:

- ***Firm Name**

  Required. Firm name is required but can be updated at any time.

- **a/k/a**

  If you commonly refer to the firm by another name, enter that alias. You can search for the firm by name or alias, and the alias will appear in parentheses after the firm name in search results.

- **Address**

  Firm's street address or post office box

- **City/State/Country/Zip**

  You do not need to enter the city, state or country. Enter the postal code (zip code) in **Zip,** then click . MR9 will automatically populate the other address fields.

- **Warning**

  Any important information that users should know about the firm when scheduling or invoicing orders. This information appears in red under **Firm Warning** in scheduling clients and parties in orders, and in **Invoice** panels in Turn In.

- **Active**

  Yes is selected by default. When the firm is no longer scheduling orders with you and you do not need to contact them anymore, slide to No.

  If you select No, a popup appears when you click **Save** asking if you would like to make all of the firm's contacts inactive too. Click **Yes** and the firm's contacts will switch to inactive mode at once.

- **Firm No.**

  Assigned by MR9 and uneditable

- **Firm Type**

  Category that best fits the firm. (Firm Type and default are set in Lists > Firms.)

- **Web URL**

  Firm's home page address

- **Main Phone**

  Local phone number you would use most often to call the firm

- **Alt. Phone**

  Additional phone number to use for the firm

- **Toll Free Phone**

  If the firm has an 800 or similar number

- **Fax**

  If the firm has a fax number

2. Click **Save.**

Reference

- Turn In
- Firms lists

Step-by-step instructions

- Adding firms to MR9
- Updating firms
- Searching firms
- Looking up firms

Entering additional firm information

Include invoice and statement details for your production/billing departments about firms.

1. In the **Additional** pane of an Edit Firm window, enter text or make selections:

- **Parent Firm**

  If the firm is part of a multi-office company, the firm's headquarters. See Looking up firms.

- **Late Charge Rate**

  Amount as a percentage (e.g., "2.000") you charge the firm as a one-time account service fee on past-due invoices. If you do not want to charge the firm this fee, enter "0." (Default amount comes from System Preferences > Entities > Firms.)

- **Finance Charge Rate**

  Amount as a percentage (e.g., "1.200") you charge the firm monthly on past-due invoices. The finance charge is calculated once a month for all open invoices (see Generating finance charges). If you do not want to charge the firm this fee, enter "0." (Default amount comes from System Preferences > Entities > Firms.)

  NOTE: Notes Log records rate changes automatically

  When you change a firm's late charge rate or finance charge rate, MR9 automatically records the change in the firm's Notes Log including when it was changed and by who.

- **Payment Terms**

  Terms for payment that will appear on this client's invoices. (Payment Terms and default are set in Lists > Accounting.)

  NOTE: Ensure that COD invoices include correct payment terms

  If this is a "Cash on Delivery" (COD) client, select your COD payment term to mark all invoices sent to this firm "Cash on Delivery." See COD invoices.

- **Invoice past due in days**

  Deadline in business days past the payment terms of invoices for this client to render payment before MR9 notifies you to start collection efforts. (Default number of days comes from System Preferences > Entities > Firms.)

- **COD**

  Slide to Yes to have MR9 track the client correctly as a "Cash on Delivery" client. See COD invoices.

- **Tax ID**

  Client's federal ID number

- **Sales Tax Rate**

  Sales tax rate as a percentage (e.g., "7.000") for the state where your client is located. (Default rate comes from System Preferences > Entities > Firms.)

- **Discount Rate**

  Percentage (e.g., "8.000") you deduct if you offer a negotiated discount on all invoices for this firm. What's discountable is specified at the service item level. See Setting up Service Item Master.

- **Always print details on invoices**

  When you bill, you can decide whether to show detailed breakdowns on each invoice or not. Slide to Yes if the firm requires services listed on all invoices at all times.

- **Consolidate Statement**

  By default, monthly statements are printed for each contact at this firm separately. Slide to Yes to print consolidated statements addressed to "Accounts Payable."

- **Statement Sending Method**

  Select a delivery method for consolidated statements in the dropdown:

  - **Don't Send** – This firm does not want to receive monthly statements.
  - **Email** – Default. For sending to firm's Accounting notification email address.
  - **Print** – For sending via USPS or other delivery method.

- **Ref. Account No.**

  When you set up to have your accounting system read MR9 data, this field can be used to store the reference number (or customer number) that the accounting system has assigned for this firm.

2. Click **Save.**

Reference

- Parent Firm
- Firms preferences
- Notes Log
- Lists > Accounting
- COD invoices
- Send Statements

- Consoldated Invoices and Statements
- Production Sheets
- Turn In

Step-by-step instructions

- Adding firms to MR9
- Updating firms
- Searching firms
- Looking up firms
- Generating finance charges
- Entering general firm information
- Managing notification emails
- Organizing with tags
- Adding standing requests
- Entering firm marketing information
- Recording collections efforts
- Entering retainers
- Uploading files to a repository
- Making entries in notes logs
- Managing notes logs
- Canceling notes
- Setting up Service Item Master

Parent Firm

A **parent firm** is the main office or headquarters for a client that has multiple offices.

Step-by-step instructions

- Entering additional firm information

Entering firm addresses

If the firm has separate addresses for billing and/or shipping, enter those designated addresses in the firms listing and MR9 will use those addresses instead of the main firm address.

Continued from Adding firms to MR9 or Updating firms.

1. In the **Addresses** pane of an Edit Firm window, enter text or make selections:

   - **Billing Address is different from the main address**

     If the firm wants invoices and statements sent to a different address, slide to Yes and enter the details below.

   - **Address**
     Street address or post office box for the billing address.

   - **City/State/Country/Zip**

     Do not enter the city, state or country. Instead, enter the firm's postal code (zip code) in **Zip,** then click . MR9 will automatically populate the other address fields.

   - **Shipping Address is different from the main address**

     If the firm wants FedEx and UPS shipments sent to a different address, slide to Yes and enter the details below.

   - **Address**
     Street address or post office box for the shipping address.

   - **City/State/Country/Zip**

     Do not enter the city, state or country. Instead, enter the firm's postal code (zip code) in **Zip,** then click . MR9 will automatically populate the other address fields.

2. Click **Save.**

Reference

- Turn In
- Firms lists

Step-by-step instructions

- Adding firms to MR9
- Updating firms
- Searching firms
- Looking up firms

Entering firm marketing information

Specify what type of firm an entity is for marketing and billing purposes.

1. In the **Marketing** pane of an Edit Firm window, enter text or make selections:

- **Class**

  Quality designation or ranking of a law firm. (Classes and default are set in Lists > Firms.)

- **Rating**

  Firm's credit rating. (Rating types and default are set in Lists > Firms.) Contacts at a firm can have different credit ratings than their firms. (See Entering contact marketing information.)

- **Source**

  How the client heard of you. (Sources and default are set in Lists > Firms.)

- **Client Since**

  Date the firm became your client

- **Do not attempt marketing**

  Slide to Yes if client does not want to receive marketing or promotional matter from your company.

- **Client Rep**

  If this client belongs to a specific client representative, who will oversee orders on behalf of the client, click to find and select that user. See Looking up users.

- **Sales Rep**

  If this client belongs to a specific sales representative/account executive, click to find and select that user. See Looking up users.

- **Billing Rate Group**

  Select a set of rate tables to use for this client in the dropdown. (Billing Rate Groups and default are set in Lists > Accounting.)

- **Billing Rate**

  Specific rate table in the selected **Billing Rate Group** to use for this firms. (Billing Rates are set in Setup > Billing Rates.) New contacts for the firm will inherit the billing rate group and table as their default.

- **Misc. Code**

  When **Firm Type** and **Class** are not enough to classify firms, use this field to categorize them further by entering your own codes.

- **Marketing Notes**

  Any information about the client that would be helpful to your marketing team.

2. Click **Save.**

Reference

- Lists > Firms
- Date Navigator
- Client Rep
- Sales Rep
- Lookup panel
- Billing Rate Groups
- Lists > Accounting
- Billing Rates
- Contacts

Step-by-step instructions

- Adding firms to MR9
- Updating firms
- Searching firms
- Entering contact marketing information
- Looking up users

Recording collections efforts

If a client is in arrears, MR9 can help you track collection efforts and results. Run the Aged A/R report to find clients who owe you money, then contact them and record your efforts and set follow-ups.

Continued from Updating firms, Finding overdue invoices, or Sending collection letters.

1. In an Edit Firm window, scroll or jump to the **Collections** pane.
2. Information from previous collection attempts appears in the results grid. Click + to document a new collections action.
3. In the **New Collection** panel, **Action Date** automatically records the current date and time and is not editable.
4. Select the method of contact used for this collection effort in the **Action Type** dropdown. (Collection Action Types and their default are set in Lists > Firms.)
5. Record what transpired with the collection effort in ***Notes** *(required).*
6. If you want to set a follow-up reminder, slide **Set Remind** to Yes. Then enter a date and time to follow up in the ***Remind Date** fields *(required).* And designate someone on staff to receive the reminder in the ***Remind To** dropdown *(required).* This information is used in Collection Follow-up. And the designated staf member will receive a reminder message on the set date and time from Notifications and Messages. See Communicating within MR9.
7. Click **Save.** The collection effort is recorded in the **Collections** pane.
8. Optionally, enter or update any of the following in the **Collections** pane:

   - **Collector**

     MR9 user responsible for collecting this firm's overdue payments. See Lookup panel.

   - **Retainer Amount**

     Not applicable. See Retainer.

   - **Account Status**

     Actionable financial status of this firm, such as COD or bankrupt. (Account statuses and their default are set in Lists > Firms.)

   - **Payment Promised Amount**

     If the client promised to send you a payment. The payment promised amount is used by Collection Forecast.

- **Payment Promised Date**

  If the client promised to send you a payment by a certain date. The payment promised date is used by Collection Forecast.

9. Click **Save.**

NOTE: Canceling collection notes

If a note is no longer relevant, you cannot delete it but you can cancel it. Click the note's hyperlinked date, then click **Cancel Note** in the **View Collection Note** panel. Click **Yes** in the popup. The note will be canceled and not appear in the collection notes log.

To see canceled notes, click **> Show Cancelled Notes.** Canceled notes appear with a line through the note and Canceled information in red.

TIP: Filtering collection notes

To see only certain types of notes in the collections notes log, click **> Type Filter.** In the **Type Filter** panel, uncheck the **Action Type** box, then check the box(es) of the action type(s) you want to view. Click **OK.**

NEXT: Use MR9's collection tools to contact, follow up, & forecast

If you have MR9 you have additional tools to help you collect. Use MR9's collection form letters to contact clients via email or traditional mail with collection details automatically included. See Sending collection letters. Then use Collection Follow-up to keep on top of your collection efforts. See Following up on collection promises. And finally, use Collection Forecast to see what income you can expect from your efforts. See Forecasting cash flow from collections.

Reference

- Collections
- Aged A/R
- Lists > Firms
- Collection Follow-up
- Notifications and Messages
- Lookup panel
- Retainer
- COD Invoices
- Collection Forecast
- Results pane

Step-by-step instructions

- Updating firms
- Finding overdue invoices
- Sending collection letters
- Communicating within MR9
- Following up on collection promises
- Forecasting cash flow from collections

Entering retainers

If a client pays you an upfront deposit, i.e., a retainer, enter and track that in MR.

1. In the **Collections** pane of an Edit Firm window, **Retainer Amount** displays the balance of any upfront deposits paid by the firm. Click .
2. In the **View Retainer History** panel, all retainers paid by the client and which invoices the retainers were applied to appear. To add a new retainer, click **New.**
3. In the New Retainer window, enter text or make selections:
   - ***Date**

     Required. Date of payment. Default is today.
   - ***Amount**

     Required. Amount of payment.
   - **Remarks**

     Reason for the retainer.
4. Click **Save.** The retainer appears in the **View Retainer History** list, and the amount is added to balance in the **Retainer Amount** field in the **Collections** pane of the Edit Firm window.

IMPORTANT: Retainers are miscellaneous receipts

If you are depositing the retainer check into your checking account, you should enter a miscellaneous receipt transaction so that it will be reflected on your deposit total. See Entering miscellaneous receipts.

Reference

- Retainer

Step-by-step instructions

- Adding firms to MR9
- Updating firms
- Searching firms
- Entering miscellaneous receipts
- Applying retainers

Retainer

A **retainer,** or upfront deposit, is money that belongs to the client but which the client has given to you to hold or to use to purchase services or products for their orders. In other words, it is money you have received but not yet earned.

NOTE: Retainers in MR9

A retainer is a liability on your books even though you deposit the funds into your checking account. As such MR9 posts it as a liability to the Client Retainers account. You manage retainers through the Collections pane of the Firm window.

Step-by-step instructions

- Entering retainers
- Applying retainers

Looking up firms

Within any MR9 function with a Firm field, you can look up firms on the fly in your MR9 database by their company name, other names you might use for them, their MR-generated firm number, or the name of a contact at the firm.

1. To find a firm in MR9, click a **Firm** field's (or **> Lookup Firm).**
2. In the **Lookup Firm** panel, select a filter in **Search By:**
   - **Firm No.**
     If selected, enter the entire firm number assigned by MR9 in **Search Criteria.**
   - **Firm Name**
     Default. Enter part of the firm's name in **Search Criteria.**
   - **Firm Name or a/k/a**
     Enter part of the firm's name or alias in **Search Criteria.**
   - **Contact No.**
     If selected, enter the entire contact number of a contact at the firm in **Search Criteria.**
   - **Contact Name**
     If selected, enter part the name of a contact at the firm in **Search Criteria.**
3. **Show Active Only** is Yes by default. If you want to search your entire firm database, slide to No.
4. Click . All firms that meet the search criteria appear in the results pane.
5. Click the hyperlinked name in the results pane to select it. If the firm does not appear in the list, see Adding firms to MR9.

NOTE: Overdue amount alerts/C.O.D. firms

If the firm you selected has an outstanding overdue amount that is larger than your cutoff, a popup will appear telling you the past due amount so you can take appropriate action. Click **OK** to close the popup.

If the firm selected is a COD client (Cash on Delivery), COD will appear next to the firm field's label.

NOTE: Using Firms module to find firms

You can look up firms directly in MR9 from **Entities > Firms.** See Searching firms.

Reference

- Contact

Step-by-step instructions

- Adding firms to MR9
- Searching firms
- Updating firms

Searching firms

Find firms directly in your MR9 database using various search criteria. Before entering a firm into the database, check to see if it is already there. See which contacts are connected to a firm, and add new contacts. See if there are duplicate entries with slightly different names that you can merge together. View financial and order trends of an individual firm.

1. Set search criteria

1. **Entities > Firms**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:

   - **Firm Name**
     Enter part of a firm's name.
   - **Firm Name search also apply to a/k/a**
     Default is No. Slide to Yes if you want to search for a firm by its alias/other name, then enter the alias in **Firm Name.**
   - **City**
     Enter part of the name of a firm's city.
   - **State**
     Click to select a state or states in the **Lookup State** popup. See Lookup panel.
   - **Firm Type**
     Click to select one or more categories of firms in the **Lookup Firm Type** popup. See Lookup panel. (Firm Types are set in Lists > Firms.)
   - **Parent Firm**
     Click to find a firm's headquarters. See Looking up firms.
   - **Client Rep**
     Click to restrict search to firms that are designated as being represented by a specific user who oversees orders on behalf of the client. See Looking up users.
   - **Sales Rep**
     Click to restrict search to firms that are commissionable to a specific sales representative. See Looking up users.

- **Tag**

  Enter text or click ▾ to select an existing tag to restrict search to firms tagged with a specific term. (Tags are set in Lists > Firms.)

- **Show Active Only**

  Default is Yes. Leave as the default if you only want to see firms that you have designated as Active (see Entering general firm information). If you want to see all firms, slide to No.

- **Firm No.**

  Enter the entire firm number assigned by MR9.

2. View results

1. Click .
2. All firms that meet the search criteria appear in the results pane. To:

   - **View firm details**

     In the Firms' results grid click the firm's:

     - **> View**
     - Hyperlinked **Firm Name or a/k/a**

   - **Update the firm**

     In Firms' results grid click the firm's:

     - **> Edit**
     - **> View** or the hyperlinked **Firm Name or a/k/a.** In the View Firm window, click **Edit.**

     See Updating firms.

   - **View the firm's contacts/add contacts**

     Click **Contacts > All Contacts** in the View Firm/Edit Firm window. Only active contacts are displayed by default. Click **Show Inactive** to see all contacts. To add contacts, see Adding contacts to MR9.

   - **View the firm's financial & order trends**

     Click **Account Overview** in the View Firm/Edit Firm window. See Viewing entity activity.

   - **Remove the firm by deleting or merging**

     See Removing entities.

TIP: Set up the results grid to work for you

The Firms' results grid layout is customizable. You can hide or show any column, rearrange the column order, stretch or shrink column widths, designate which column to sort results by in ascending or descending order, and choose which columns you want to always be visible when scrolling through the results. You can save your custom grid layout or return to the default layout. See Customizing grids.

NOTE: Finding firms on the fly

You can look up firms on the fly in any MR9 function with a **Firm** field. See Looking up firms.

Reference

- Lookup panel
- Lists > Firms
- Parent Firm
- Client Rep
- Sales Rep
- Lookup panel
- Account Overview
- Historical data saved in a merge

Step-by-step instructions

- Adding firms to MR9
- Searching in MR9
- Looking up firms
- Looking up users
- Entering general firm information
- Updating firms
- Adding contacts to MR9
- Viewing entity activity
- Removing entities
- Customizing grids

Entering general contact information

Enter basic contact information and important warnings. Email contacts directly from their listing.

Continued from Adding contacts to MR9 or Updating contacts.

1. In the **General** pane of an Edit Contact window, enter text or select options:

   - ***Full Name**

     Required. Instead of entering text here, enter the contact's name and title in the fields below. MR9 will compile a list of full name variations for you to select from in a dropdown next to this field.

   - **First Name**

     Contact's given name

   - **Mi.**

     Contact's middle name or initial

   - **Last Name**

     Contact's family name

   - **Salutation**

     Contact's title, i.e., how you address them

   - **Main Phone**

     Firm's phone number

   - **Direct Phone**

     Contact's phone number at the firm

   - **Mobile Phone**

     Contact's cell phone number. Works with **Mobile Vendor** to send SMS (text messages) from within MR9. See Sending text messages from MR9.

   - **Mobile Vendor**

     Contact's cell phone service provider. *Required to send text messages.*

   - **Fax**

     If the contact has a facsimile machine, enter their fax number.

   - **Active**

     Yes is selected by default. When the contact is no longer scheduling orders with you and you do not need to contact them anymore, slide to No.

When you select No for a contact whose email is used for any notification emails (see Managing notification emails), a popup appears when you click **Save** asking if you would like to remove the contact's email address from all email notification lists. Click **Yes** to prevent future notification emails being sent to that email address.

- **Contact No.**

  Assigned by MR9 and uneditable

- **a/k/a**

  Contact's nickname or other alias

- **Email**

  Contact's business email address. Click ✉ to send email directly to contact. See Composing emails.

  NOTE: Contact's email address automatically assigned to notification emails

  When you enter a contact's email address here and click **Save,** MR9 automatically assigns this address to receive all notification email types. If you do not want this contact to receive certain types of notification emails and/or want other contacts to receive certain types of notification emails for this contact, see Managing notification emails.

- **Gender**

  Contact's gender classification. (Gender classifications and default are set in Lists > Contacts.)

- **Title**

  Contact's job title. (Contact titles and default are set in Lists > Contacts.)

- **Contact Type**

  Category that best fits the contact. There is some overlap between **Contact Type** and **Title.** For example a secretary at a law firm would be the same in both categories. But a lawyer who is also the owner of a law firm would be classified as Lawyer in **Contact Type** — but Owner in **Title.** (Contact Type and default are set in Lists > Contacts.)

- **Warning**

  Any important information that users should know about the contact when scheduling or invoicing orders. This information appears in red under contact warnings in orders, in **View Contact/Edit Contact** panels, and in **View Party/Edit Party** panels.

2. Click **Save.**

Reference

- Lists > Contacts

Step-by-step instructions

- Adding contacts to MR9
- Updating contacts
- Sending text messages from MR9
- Managing notification emails
- Composing emails
- Emailing from MR9
- Searching contacts
- Looking up contacts
- Entering additional contact information
- Organizing with tags
- Granting access
- Entering contact marketing information
- Adding standing requests
- Remembering important client dates
- Managing contacts’ award points
- Uploading files to a repository
- Making entries in notes logs

Entering additional contact information

Enter user credentials for online and miscellaneous information.

Continued from Adding contacts to MR9 or Updating contacts.

1. In the **Additional** pane of an Edit Contact window, enter text or make selections:

   - **Account is locked out**

     If a contact has made too many incorrect attempts to log into MR Connect, the system will lock them out. Slide to No to allow the contact to log in again. (The number of incorrect attempts is set in Connect > Connect Preferences > Login.)

   - **Login Name**

     Uneditable if (use Email as Login Name) appears in field. (The option to use the contact's email address as their login ID is set in Connect > Connect Preferences > Login.)

   - **Password/Reset Password**

     - **New contact:** If you have MR Connect, enter an initial password for the contact in **Password.** Users can reset their password themselves in MR Connect, and you can reset passwords here too.
     - **Existing contact:** If the contact needs a new password for MR Connect:

       1. Click **Reset Password.**
       2. In the **Reset Password** panel, enter their new password in both ***New Password** and ***Confirm New Password** *(both required)*.
       3. Click **Save.**

   - **Tax ID**

     Contact's federal ID number, if different from the firm's.

   - **Invoice Sending Method**

     How contact wants to receive invoices:

     - **Don't Send** – This contact does not receive invoices.
     - **Email** – Default. For sending to contact's Accounting notification email address.
     - **Print** – For sending via USPS or other delivery method.
     - **Print & Email** – For both emailing and USPS/other delivery method.

- **Statement Sending Method**

  How contact wants to receive statements (method will be used except for consolidated statements sent to the firm):

  - **Don’t Send** – This contact does not receive statements.
  - **Email** – Default. For sending to contact’s Accounting notification email address.
  - **Print** – For sending via USPS or other delivery method.

2. Click **Save.**

Reference

- MR Connect
- Connect Preferences

Step-by-step instructions

- Adding contacts to MR9
- Updating contacts

Granting access

Designate and monitor seniors, contacts who have access to other contact's activities in MR Connect. To make someone senior to another contact, you grant them access to the contact's MR Connect activities. You can do that by either giving other contacts access to a single contact *(Grant Access To)* or giving one contact access to multiple contacts *(Have Access To).*

Continued from Updating contacts.

1. In an Edit Contact window, scroll or jump to the **Grant Access To/Have Access To** panes.
2. Any contacts that have already been granted access to this contact's activities or have granted this contact access to their own activities appear in the panes.
   - **To give other contacts access to this contact's activities:** Click ➕ next to **Grant Access To** to enter additional contact(s).
   - **To give this contact access to other contacts' activities:** Click ➕ next to **Have Access To** to enter additional contact(s).
3. In the **Grant Access To/Have Access To** panes, any contacts at the current contact's firm that were not already selected appear. To add access priviledges:
   - **Other contacts at the same firm**

     Check the **Contact** box at the top of the pane to select all contacts or check individual contacts' boxes.
   - **Contacts at other firms**

     Click **Switch to All Firms.** Then find contact(s) (see Looking up contacts), and check their box(es).
4. Click **Save.** New contacts granted access appear in the **Grant Access To** pane. New contacts whose activity this contact can access appear in the **Have Access To** pane.
5. To cancel access to or from a contact, check their box in the appropriate pane, then click ⛔.

TIP: Use Have Access To for lead attorneys/paralegals

If a lead attorney or paralegal oversees a case involving several attorneys, **Have Access To** is the quicker way to grant the lead access to multiple attorneys than going into each attorney's profile one at a time to grant the lead access to their MR Connect activities.

Reference

- MR Connect
- Seniors

Step-by-step instructions

- Updating contacts
- Looking up contacts

Seniors

Seniors are contacts, such as lead attorneys or paralegals — anyone who oversees a case or otherwise needs access to other contacts' activities in MR Connect, such as depo schedules, file repositories, and invoices.

NOTE: Designating seniors relates to online access

Seniors have access to all activities in MR Connect associated with any contact to whom they are senior. Each contact can have an unlimited number of seniors, and can be senior to an unlimited number of contacts. A senior can be any contact from any firm. See Granting access.

Reference

- MR Connect

Step-by-step instructions

- Updating contacts
- Granting access

Entering contact marketing information

Enter personal information about the contact, plus marketing and billing information.

Continued from Adding contacts to MR9 or Updating contacts.

1. In an Edit Contact window, scroll or jump to the **Marketing** pane. Then enter/update text or make selections:

   - **Rating**

     Credit rating of the contact. Contacts and firms have separate **Rating** fields, so contacts at a firm can have different ratings than other contacts at the firm and from the firm itself. (Contact credit rating types and default are set in Lists > Contacts.)

   - **Client Since**

     Date the contact became your client.

   - **Do not attempt marketing**

     Slide to Yes if client does not want to receive marketing or promotional matter from your company.

   - **Billing Rate Group**

     Set of rate tables to use for this contact. Default is the firm's Billing Rate Group. Contacts can be billed using a different set of rate tables than their firm. Click ▾ and select a different group in the dropdown. (Billing Rate Groups and default are set in Lists > Accounting.)

     TIP: Save time later by pre-assigning billing rates

     If you assign contacts to a billing rate group with linked billing rate tables, only those rate tables appear when billing an order to that contact. This will save you time since you do not have to search through all of your rate tables to find the correct one for a particular order.

   - **Billing Rate**

     Specific billing rate table in the selected **Billing Rate Group** to use for this contact. Default is the firm's rate table. Contacts can be billed using a different rate table than their firm. Click ▾ and select a different rate table in the dropdown. (Billing Rates are set in Setup > Billing Rates.)

   - **Home Address**

     If you prefer to use contacts' home addresses for sending cards and gifts (see Keeping track of important client dates), enter the street address only. City, state, zip code and country have their own fields/dropdowns.

- **City/State/Country/Zip**

  Do not enter the contact's city, state or country. Instead, enter the contact's postal code (zip code) in **Zip,** then click . MR9 will automatically populate the other address fields.

- **Client Rep**

  Default is the client representative assigned to oversee orders for the contact's firm. If this contact belongs to a different client rep, click . See Looking up users.

- **Sales Rep**

  Default is the sales representative/account executive assigned to the firm. If this contact belongs to a different sales rep, click . See Looking up users.

- **Misc. Code**

  When **Contact Type** and **Class** are not enough to classify contacts, use this field to categorize them further by entering your own codes.

2. Click **Save.**

Reference

- Lists > Contacts
- Date Navigator
- Billing Rate Groups
- Lists > Accounting
- Setup > Billing Rates
- Client Rep
- Sales Rep
- Lookup panel

Step-by-step instructions

- Adding contacts to MR9
- Updating contacts
- Keeping track of important client dates
- Looking up users

Remembering important client dates

Enter the contact's birthday, wedding anniversary, and other important dates to have MR9 automatically remind you of an upcoming event within a set number of days. Use Anniversary Inquiry to print labels for cards to send to clients celebrating upcoming anniversaries.

Continued from Updating contacts.

1. In an Edit Contact window, scroll or jump to the **Anniversaries** pane.
2. Any anniversaries that have already been entered appear in the pane.
   - To update or remove an existing anniversary, click its hyperlinked **Type.**
   - To enter additional anniversaries, click next to Anniversaries.
3. In the **Edit Anniversary/New Anniversary** panel, enter or update:
   - **Anniversary Type**

     Anniversary category. (Anniversary Type categories and default are set in Lists > Others.)
   - ***Month/*Day/Year**

     Required. Select the event month and day in the dropdowns. Optionally, you can enter the event year.
   - **Description**

     Any information for the staff who will be alerted to the anniversary, such as contact's gift preferences, and what you have sent to them in the past.
   - **Alert in advance (days)**

     Default is 1. Revise if needed.
   - ***Alert Time**

     Required. Time of day on the Alert date for MR9 to automatically send notice to the staff selected to receive the alert.
   - **Alert To**

     If no one is listed, or you wish to alert someone else, click . In the **Alert To** panel, check the box(es) of staff who should receive the anniversary alert. When finished selecting staff, click **Save** in the **Alert To** panel.
4. In the **New Anniversary** panel, click **Save >**
   - **Save & New:** To save the anniversary and add more events.

- **Save & Close:** When you have no more anniversaries to add for the contact.

Reference

- Anniversary Inquiry
- Lists > Others
- Results pane

Step-by-step instructions

- Updating contacts
- Adding contacts to MR9
- Keeping track of important client dates

Managing contacts' award points

If you reward contacts with points for different services, you can monitor each contact's points, designate who within a firm will receive points earned by this contact, and allow the contact to view and redeem their points online. Point rewards, such as cash or gift certificates, are set up in Lists > Others. Which services earn points is set up in Service Item Master.

Continued from Updating contacts.

Monitor points

1. In an Edit Contact window, scroll or jump to the **Award Points** pane.
2. View the contact's current points status *(fields are uneditable):*
   - **Current Balance**

     Total available redeemable points.
   - **Pending Points**

     Points contact will earn when their currently scheduled orders are billed.
   - **Points Earned**

     Total points contact has earned since account was opened, including points already redeemed.
   - **Points Spent**

     Total point amount the contact has redeemed since account was opened.
3. Click **> Points History** to view the contact's entire point history. The **Points History** panel lists which services earned how many points on which invoices, current status of those points, how they were redeemed, and any notes about the points. Click **Close.**

Give contacts online access

Check the **Show Reward Points menu on Connect** box to give the contact access to view and redeem their points in MR Connect.

Manage recipients

In the **Award Points To** pane, any contacts who have already been designated to receive points earned by this contact appear in the pane. To:

- **Designate who receives points**

  1. Click in Award Points header.
  2. In the **Add Award Points To** panel, all contacts at the same firm appear. Check the boxes of contacts who should receive points.
  3. Enter the amount of points the contact will earn for each unit of a point-eligible service in **Multiply By** (whole numbers only). For example if this is one of your best clients, you might want to award them double-points for every point-eligible service you offer. Default is 1.
  4. Click **Save.**

- **Update or remove a recipient**

  1. Click the hyperlinked contact in **Award Points To** pane.
  2. In the **Edit Award Points To** panel:
     - **To update the recipient's points multiplier,** edit the number in ***Multiply By** *(required)*. Then click **Save.**
     - **To remove the recipient,** click **Delete.** Then click **Yes** in the popup.

Reference

- Award Points
- Lists > Others
- Service Item Master
- MR Connect
- Results pane

Step-by-step instructions

- Updating contacts
- Fulfilling online reward point requests

Award Points

Award Points are used to encourage clients to book with your agency by rewarding them with points for different services. If you have MR Connect, you can allow contacts to request point redemptions online.

TIP: Use point system even if you can't reward clients

If your state does not allow reward programs, use points to track your clients' order history and see who your best customers are by which *contact's* calls generate the most revenue instead of by firm only.

Reference

- Fulfill Points Redemption Orders

Step-by-step instructions

- Managing contacts' award points
- Fulfilling online reward point requests

Looking up contacts

Find contacts in your MR9 database by their name (various versions including aliases) or the company they work for.

1. To find a contact in MR9, click next to a **Contact** field.
2. In the **Lookup Contact** popup, select a filter in **Search By:**
   - **Firm Name**
     Enter part of the firm's name in **Search Criteria.**
   - **Contact First Name**
     If using the Full Name filter returns too many results, select First Name and enter part of the contact's given name (if a person) in **Search Criteria.**
   - **Contact Full Name**
     Default. Enter part of the contact's name in **Search Criteria.**
   - **Contact Full Name or a/k/a**
     Enter part of the contact's name or alias in **Search Criteria.**
   - **Contact Last Name**
     If using the Full Name filter returns too many results, select Last Name and enter part of the contact's surname in **Search Criteria.**
   - **Contact No.**
     If selected, enter the entire contact number of a contact in **Search Criteria.**
3. Click . All contacts that meet the search criteria appear in the results pane.
4. Click the hyperlinked **Contact** in the results pane to select that person.

NOTE: Using Contacts module to find contacts

You can look up contacts directly in MR9 from **Entities > Contacts.** See Searching contacts.

Step-by-step instructions

- Adding contacts to MR9
- Searching contacts

Searching contacts

Find contacts directly in your MR9 database using various search criteria. Before entering a contact into the database, check to see if it is already there. See if there are duplicate entries with slightly different names that you can merge together. View financial and order trends of an individual contact.

1. Set search criteria

1. **Entities > Contacts**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:

   - **Name**

     Full Name is the default. To search by:

     - **Full Name** – Enter part of the contact's name in the field.
     - **Full Name or a/k/a** – Select this option in the dropdown and enter part of the contact's name or alias in the field.
     - **First Name** – Select this option in the dropdown and enter part of the contact's given name in the field.
     - **Last Name** – Select this option in the dropdown and enter part of the contact's surname in the field.

   - **Firm Name**

     Click to select a firm in the **Lookup Firm** popup. See Looking up firms.

   - **Contact Type**

     Click to select one or more categories of contacts in the **Lookup Contact Type** popup. See Lookup panel. (Contact Types are set in Lists > Contacts.)

   - **Email**

     Enter part of the contact's email address.

   - **Client Rep**

     Click to restrict search to contacts who are designated as being represented by a specific user who oversees orders on behalf of the client. See Looking up users.

   - **Sales Rep**

     Click to restrict search to contacts who are commissionable to a specific sales representative. See Looking up users.

- **Tag**

  Enter text or click ▾ to select an existing tag to restrict search to contacts tagged with a specific term. (Tags are set in Lists > Contacts.)

- **Caller ID**

  Enter the contact's 10-digit Main Phone, Alternate Phone, or Toll-Free Phone number.

- **Show Active Only**

  Default is Yes. Leave as the default if you only want to see contacts that you have designated as Active (see Entering general contact information). If you want to see all contacts, slide to No.

- **Contact No.**

  Enter the entire contact number assigned by MR.

2. View results

1. Click .
2. All contacts who meet the search criteria appear in the results pane. To:

   - **View contact details**

     In the Contacts' results grid click the contact's:

     - **> View**
     - Hyperlinked **Full Name**

   - **Update the contact**

     In the Contacts' results grid click the contact's:

     - **> Edit**
     - **> View** or the hyperlinked **Full Name.** In the View Contact window, click **Edit.**

     See Updating contacts.

   - **Create a new contacts for same firm**

     Click **More > Copy & New** in the View Contact/Edit Contact window. To add contacts, see Adding contacts to MR9.

   - **View the contact's financial & order trends**

     Click **Account Overview** in the View Contact/Edit Contact window. See Viewing entity activity.

Remove the contact by deleting or merging

- See Removing entities.

TIP: Set up the results grid to work for you

The Contacts' results grid layout is customizable. You can hide or show any column, rearrange the column order, stretch or shrink column widths, designate which column to sort results by in ascending or descending order, and choose which columns you want to always be visible when scrolling through the results. You can save your custom grid layout or return to the default layout. See Customizing grids.

NOTE: Finding contacts on the fly

You can look up contacts in any MR9 function with a **Contact** field. See Looking up contacts.

Reference

- Lookup panel
- Contacts lists
- Client Rep
- Sales Rep
- Lookup panel
- Account Overview
- Historical data saved in a merge

Step-by-step instructions

- Searching in MR9
- Looking up firms
- Looking up users
- Looking up contacts
- Updating contacts
- Adding contacts to MR9
- Viewing entity activity
- Removing entities
- Customizing grids

Entering general location information

Enter basic location information, including addresses and important warnings.

Continued from Adding locations to MR9 or Updating locations.

In the **General** pane of a New Location/Edit Location window, enter text or make selections:

- ***Location Name**

  Required. Location name is required but can be updated at any time.

- **a/k/a**

  The alias you use to commonly refer to the location

- **Address**

  Location's street address or post office box

- **City/State/Country/Zip**

  Do not enter the city, state or country. Instead, enter the postal code (zip code) in **Zip,** then click . MR9 will automatically populate the other address fields.

- **Directions**

  Enter any information that would help someone find the location easier.

- **Location Type**

  Category that best fits the location. (Location types and default are set in Lists > Locations.)

- **Web URL**

  Location's home page address.

- **Active**

  Default is Yes. When the location is no longer used for orders, slide to No.

- **Location No.**

  Assigned by MR9 and uneditable

- **Main Phone**

  Local phone number you would use most often to call the location

- **Alt. Phone**

  Additional phone number to use for the location

- **Toll Free Phone**

  If the location has an 800 or similar number.

- **Fax**

  If the location has a fax number.

- **Department**

  Where in the location the records are stored. (Departments and default are set in Lists > Locations.)

- **Contact Person**

  Name of the point person at the location

- **Warning**

  Any important information that users should know about the location when scheduling orders. Information entered here appears in red in the **Order Location** pane of View Order/Edit Order windows.

- **Email**
  Email address of the point person at the location. Click ✉ to send email directly to contact. See Composing emails.

Reference

- Lookup panel
- Locations lists

Step-by-step instructions

- Adding locations to MR9
- Updating locations
- Composing emails

Entering additional location information

Enter information about records pickup and subpoena delivery.

Continued from Adding locations to MR9 or Updating locations.

In the **Additional** pane of an Edit Location window, enter text or make selections:

- **Serve By**

  Select the default method for delivering subpoenas to this location in the dropdown. (Serve By options and default are set in Lists > Locations.)

- **ROI Handled By**

  If the entity that handles the release of information (ROI) for this location is different from the location, click . See Looking up locations.

- **Expeditor**

  If a particular MR9 user has intimate knowledge about this location, click to find and select that user. See Looking up users. When scheduling pickups at this location, you can check this listing to see if an expeditor is assigned to the location and select them as the runner (field agent) for work orders. See Scheduling pickups.

Reference

- Lists > Locations
- Lookup panel

Step-by-step instructions

- Adding locations to MR9
- Looking up locations
- Updating locations
- Looking up users
- Scheduling pickups

Entering information about doctors

If the location is a doctor's office, clinic, or something similar, enter information about the doctor, including hospitals/clinics/practices they are affiliated with.

Continued from Adding locations to MR9 or Updating locations.

1. In the **Doctor Info** pane of a New Location/Edit Location window, enter text or make selections:

   - **Title**

     Select the doctor's title in the dropdown. (Doctor Titles and default are set in Lists > Locations.)

   - **First Name/Mi./Last Name**

     Enter the doctor's given name, middle name or initial, and family name in the 3 fields.

   - **Specialty**

     Select the doctor's area of expertise in the dropdown. (Doctor Specialties and default are set in Lists > Locations.)

2. To add the doctor's affiliations, click . Then in the **New Affiliate** panel, click to select the location. See Looking up locations.

3. With the location selected in the **New Affiliate** panel, enter text or make selections:

   - **Specialty**

     Select the location's area of expertise in the dropdown.

   - **Since**

     Enter the date the doctor started working with the affiliate. See Date Navigator.

   - **Active**

     Default is Yes. Slide to No if doctor no longer practices with the affiliate.

4. Click **Save >**

   - **Save & New** – To save the affiliate location and start a new one for the doctor.
   - **Save & Close** – To save your work and close the panel.

   The saved affiliate appears in the **Affiliated With** pane.

Reference

- Lists > Locations

- Date Navigator

Step-by-step instructions

- Adding locations to MR9
- Updating locations
- Searching locations
- Looking up locations

Looking up locations

Within any MR9 function with a Location field, you can look up locations on the fly in your MR9 database by their name, other names you might use for them, or their city.

1. To find a location in MR9, click a **Location** field's (or **> Lookup Location)**.
2. In the **Lookup Location** popup, select a filter in **Search By:**
   - **Location Name**
     Default. Enter part of the location's name in **Search Criteria.**
   - **Location Name or a/k/a**
     Enter part of the location's name or its alias in **Search Criteria.**
   - **City**
     If selected, enter part of the location's city name in **Search Criteria.**
   - **Show Active Only**
     Default is Yes. If you want to search your entire location database, slide to No.
3. Click . All locations that meet the search criteria appear in the results pane.
4. Click the hyperlinked **Location Name (a/k/a)** in the results pane to select it. If the location does not appear in the list, click **New** to add the location to MR. See Adding locations to MR9.

NOTE: Using Locations function to find locations

You can look up locations directly in MR9 from **Entities > Locations.** See Searching locations.

TIP: View & edit the existing location without leaving the function

Instead of going to the Locations function to view and update a location that is already selected in a Location field, click the field's or **> View Location.** See Updating locations.

Step-by-step instructions

- Adding locations to MR9
- Searching locations
- Updating locations

Searching locations

Find locations directly in your MR9 database using various search criteria. Before entering a location into the database, check to see if it is already there. See if there are duplicate entries with slightly different names that you can merge together.

1. Set search criteria

1. **Entities > Locations**
2. In the **Search By** pane, no specific filter is required but you must use at least one of the search filters:

   - **Location Name**
     Enter part of a location's name.
   - **Location Name search also apply to a/k/a**
     Default is No. Slide to Yes if you want to search for a location by a variation of its name, then enter the alias in **Location Name.**
   - **Address**
     Enter part of the location's street address or P.O. box.
   - **City**
     Enter part of the name of a location's city.
   - **State**
     Click to select a state or states in the **Lookup State** popup. See Lookup panel.
   - **Zip**
     Enter the location's postal/zip code.
   - **Caller ID**
     Enter the location's 10-digit Main Phone, Alternate Phone, or Toll-Free Phone number.
   - **Location Type**
     Default is ALL. Click to select one or more categories of locations in the **Lookup Location Type** popup. See Lookup panel. (Location Types and default are set in Lists > Locations.)
   - **Tag**
     Enter text or click ▾ to select an existing tag to restrict search to locations tagged with a specific term. (Tags are set in Lists > Locations.)

- **Show Active Only**

  Default is Yes. Leave as the default if you only want to see locations that you have designated as Active (see Entering general location information). If you want to see all locations, slide to No.

2. View results

1. Click .
2. All locations that meet the search criteria appear in the results pane. To:

   - **View location details**

     In the Locations' results grid click the location's:

     - **> View**
     - Hyperlinked **Location Name (a/k/a)**

   - **Update the location**

     In the Locations' results grid click the location's:

     - **> Edit**
     - **> View** or the hyperlinked **Location Name (a/k/a).** In the View Location window, click **Edit.**

     See Updating locations.

   - **Remove the location by deleting or merging**
     See Removing entities.

NOTE: Finding locations on the fly
You can look up locations on the fly in any MR9 function with a **Location** field. See Looking up locations.

Reference

- Lookup panel
- Lists > Locations
- Historical data saved in a merge

Step-by-step instructions

- Adding locations to MR9
- Looking up locations
- Entering general location information
- Updating locations
- Merging data

Entering general BU information

Enter business unit location and contact information.

Continued from Setting up business units or Updating business units.

1. In the **General** pane of an Edit BU window, enter text or make selections:

   - ***BU Name**

     Required. Name is required but does not have to be unique.

   - ***BU ID**

     Required. Unique ID is required, maximum 10 characters. See Best Practices: Business Unit ID.

   - **Address**

     Street address only. City, state, zip code and country have their own fields/dropdowns.

     After entering the full address, you can view the location and get directions by clicking and selecting a map from the dropdown.

   - **Directions**

     Any instructions entered here will appear in the **Directions** field of an Order window in the Orders if the order will be at the business unit's office.

   - **City/State/Country/Zip**

     You do not need to enter the city, state or country. Enter the postal code (zip code) in **Zip,** then click the field's . MR9 will automatically populate the other address fields.

   - **Phone**

     Business unit's main phone number

   - **Fax**

     If the business unit has a fax number.

2. Click **Save.**

Reference

- Best Practices: Business Unit ID

Step-by-step instructions

- Setting up business units
- Updating business units

Entering additional BU information

Enter miscellaneous information about business units.

Continued from Setting up business units or Updating business units.

1. In the **Additional** pane of an Edit BU window, enter text or make selections:

   - **Tax ID**

     Your business tax ID number

   - **Web URL**

     Your company's web address

   - **Remit To**

     BU to be displayed in the remittance section of invoices and statements.

   - **Remarks**

     Information about the BU that is not covered in other BU fields. If another BU was merged into the current business unit MR9 will automatically record that here with the name of the user who merged the BU and when it was merged.

Step-by-step instructions

- Setting up business units
- Updating business units

Entering BU preferences

Enter the business unit's production and billing preferences.

Continued from Setting up business units or Updating business units.

1. In the **Preferences** pane of an Edit BU window, enter text or make selections:

   - **Late charge in days**

     Number of days before a late charge (one-time account service fee assessed on past-due invoices) is added to the invoice amount. Works with the **Late Charge** specified in the firm being billed. (See Entering additional firm information for information on entering late charge percentages.)

   - **Order due in days**

     Default number of days to take retrieving records. MR9 uses this to calculate the due date for parts ordered. See Entering general part information.

   - **Hide rate per unit when printing invoice with details**

     Slide to Yes to print detailed invoices that do not show rates per unit.

2. Click **Save.**

Reference

- Part

Step-by-step instructions

- Setting up business units
- Updating business units
- Entering general part information

Adding your company logo to invoices

Before uploading your company logo to print on billing documents, prepare it for best appearance and performance. Follow our format and size guidelines to achieve the best results.

Continued from Setting up business units or Updating business units.

1. Prepare your logo

Before uploading, check that your logo image file conforms to these guidelines:

- **Logo image format:** JPG or PNG
  MR9 only accepts .jpg or .png files
- **Logo image file size:** below 20Kbyte
  Image file size has a direct impact on performance: Larger file sizes slow file processing, downloading and printing.
- **Logo image ratio:** 3:1
  Logo area on printed invoices and statements is 3 x 1 inch (width-to-height). MR9 will stretch or shrink the logo proportionately to fit the area.

2. Add your logo

To add your company logo in the **Invoice/Statement Logo** pane of an Edit BU window, see Uploading logos for insertion.

Step-by-step instructions

- Setting up business units
- Updating business units
- Uploading logos for insertion

Account Overview

Account Overview gives a month-by-month comparison of the financial and order activity for a firm or a single contact at a firm over the last 6 months, year or 2 years in interactive line graphs.

Reference

- Firms
- Contacts

Step-by-step instructions

- Viewing entity activity

Adding standing requests

Instead of entering one service item at a time a client has requested for an order, speed up your process by selecting a group of service items at once from the preset list. Include your clients' standing orders in their firm and/or contact profiles. Then you can use Prefill Services on an order or invoice to easily select all of the service items a client expects.

1. In an Edit Firm/Edit Contact window, scroll or jump to the **Preferred Services** pane.
2. Any services that have already been entered appear in the pane. Click next to Preferred Services to enter additional preferred services.
3. In the **New Preferred Services** panel, **Service Group** defaults to 9. Misc. Charge. Select a different service group if desired.
4. Select the preferred service's category in **Service Subgroup.** Only those service items belonging to the selected subgroup appear in the **Service Item** dropdown below.
5. Select the preferred service in **Service Item.**
6. Enter details about the service item:
   - **Units**

     If the standing order includes a set number of the selected service item. The default is 0 (zero).
   - **Due in days**

     Number of business days this service item for this client is due in (for regular deliveries). MR9 automatically calculates an order's due date, excluding weekends and designated holidays (see Holidays preferences). The default is 0 (zero). If a firm's contact has a different preference than the firm's **Due in days** preference, the contact's preference will be used for that contact's orders.
   - **Delivery Method**

     If applicable, the client's preferred way of receiving the service item. (Delivery methods and default are set in Lists > Production.)
   - **Turnaround Type**

     If the client wants a specific type of expedited delivery. (Turnaround times and default are set in Lists > Contacts.)
   - **Instructions**

     Any additional information for your staff about the client/service item.
7. Click **Save >**

- **Save & New:** To add the preferred service to the firm or contact and add more services.
- **Save & Close:** When you have no more preferred services to add to the firm or contact.

Reference

- Holidays preferences
- Lists > Production
- Lists > Contacts

Step-by-step instructions

- Entering preferred or requested services
- Updating firms
- Updating contacts

Managing notification emails

Enter an entity's email address(es) and flag them to receive specific types of emails from MR. For example if a firm wants different types of emails sent to different people in the company you can designate which addresses receive which types of email notices.

1. To manage notification emails for:
   - **One entity** – In the entity's Edit window, scroll or jump to the **Notification Email** pane.
   - **Multple contacts at a firm** – In a View Firm/Edit Firm window, click **Contacts > Notification Emails** in the header.
2. Any email addresses that have already been entered appear in the pane. To add notification emails for:
   - **One entity** – Click in the **Notification Email** header to enter additional email address(es).
   - **Multple contacts at a firm** – Click **New** in the **Notification Emails for Contacts** panel.
3. In the **New Notification Email** panel, either:
   - Check one or more email category boxes under ***Notification Type.**
   - Select an email category in the ***Notification Type** dropdown.

   Notification types are set by MR9 and cannot be edited.
4. Enter the address in ***Email** *(required),* which you want to send these type of email notifications to.
5. Make any notes to your staff about the address in **Remarks.**
6. If there is an **Add To** pane below **Remarks,** the address entered in ***Email** will be used for all the contacts selected. If you do not want to send the type of notification email selected to the address in ***Email** for any of these contacts, uncheck their box(es). For example if a lawyer wants to get their own order and repository notifications but someone else at the firm should get all invoice notifications, you would uncheck the lawyer in the **Add To** pane when adding an email address for the the firm's invoice notification emails.
7. Click **Save >**
   - **Save & New:** To add the email address to the **Notification Email** pane and continue adding addresses.

- **Save & Close:** When you are finished adding addresses.

NOTE: Entities' email addresses automatically added to their notification emails list

When saving a new contact, MR9 automatically fills their **Notification Email** pane with the email address entered in their **General** pane. See Entering general contact information.

TIP: Quickly remove inactive contacts from future notification emails

If a contact has left their order, select No in the **Active** slider in the **General** pane of their listing. When you click **Save,** a popup will ask if you want to delete their email address from notification emails. Click **Yes,** and the contact will be removed from any future automatic notification emails.

Step-by-step instructions

- Updating firms
- Updating contacts
- Entering general contact information

Viewing entity activity

View month-by-month comparisons of the financial and order activity for a firm or a single contact at a firm over different time periods.

Continued from Searching firms or Searching contacts.

1. In a View or Edit Firm/Contact window, click **Account Overview** in the header.
2. In the **Account Overview** panel, you can view total historical and future data in a table at the top of the panel and trend line graphs below. Depending on the entity, the top chart displays:
   - **Total Receivables**

     Total receivables since they became a client
   - **Active Orders**

     Any orders currently under way
   - **Active Parts**

     Any parts currently under way
3. The line graphs default to the entity's trends over the last six months. Depending on the entity, the line graphs display:
   - **Account Activity Trends**
     - Revenue generated each month
   - **Order Trends**
     - **Blue line:** Orders placed each month
     - **Red line:** Orders canceled each month
   - **Part Trends**
     - **Blue line:** Parts ordered each month
     - **Red line:** Parts canceled each month
4. The line graphs are interactive. Hover over a point in a line to display that month's total $ amount or number.
5. View the entity's trends over different time periods by clicking:
   - **Last 6 months**

     Default. Shows the month-by-month trend for the last 6 calendar months.

- **Last 1 year**

  Shows the month-by-month trend over the last year.

- **Last 2 years**

  Shows the month-by-month trend over the last two years.

Reference

- Account Overview

Step-by-step instructions

- Searching firms
- Searching contacts

Tags

Tags provide a way to label entities with relevant, searchable keywords or phrases. Tags are especially helpful in organizing firms for marketing purposes and contacts for customer service treatment.

Reference

- Firms
- Contacts
- Locations

Step-by-step instructions

- Organizing with tags
- Searching firms
- Searching contacts
- Searching locations
- Managing tags

Organizing with tags

Label firms, contacts, and locations with tags (keywords or phrases) to mark them as belonging to specific groups which you can use for different purposes — such as monitoring or marketing. You can use any words as a tag, and a single entity can have an unlimited number of tags.

1. In an Edit [Entity] window, scroll or jump to the **Tags** pane.
2. Any tags that have already been selected appear in the pane. Click in the **Tags** header.
3. In the **New Tag** panel's ***Tag** *(required)* field, either:
   - **Enter text** – Tags created this way are saved in the entity only and, while searchable, they will not appear in any **Tag** dropdown.
   - **Select an entry in the dropdown** – Tags that appear in the dropdown are set in Lists > Firms, Lists > Contacts, and Lists > Locations.
4. Click **Save >**
   - **Save & New:** To add the tag to the **Tags** pane and continue adding tags to the entity.
   - **Save & Close:** When you are finished adding tags to the entity.

BEST PRACTICES: Use tag lists instead of entering tags manually

Instead of entering tags for individual entities manually each time, create tags in Setup > Lists (see Customizing lists.) Then users can select from a dropdown containing appropriate tags for the particular entity they are tagging. This is faster than typing and eliminates misspellings. Having a uniform list in a dropdown for users to select from is more useful company-wide, since everyone will choose tags from the same list.

If there are any tags entered manually in individual firms, contacts, or locations, they can be added to their respective tag dropdowns in Setup > Lists to make them available for other similar entities.

TIP: Removing tags from entities

If a tag no longer applies to an entity, click the hyperlinked tag in the entity's **Tags** pane, then click **Delete** in the **Edit Tag** panel. Click **Yes** in the popup that appears.

TIP: Use Tag Manager for faster tagging

If all you want to do is add or manage tags in existing entities, use Tag Manager to find entities and add or remove tags quickly. You can also print labels or send emails from Tag Manager. See Managing tags.

Reference

- Tags

- Lists > Firms
- Lists > Contacts
- Lists > Locations
- Setup > Lists

Step-by-step instructions

- Updating firms
- Updating contacts
- Updating locations
- Customizing lists
- Managing tags

Accounting

Although MR9 is not an accounting system, it does track many financial aspects of your business, can be used with *QuickBooks,* and replaces separate billing software.

For how to set up lists, see Customizing lists.

- **Account Type**

  Basic accounting rules group all finance-related things into 5 fundamental types of accounts: Assets, Liabilities, Equity, Income and Expenses. MR9 provides an expanded list of account types, which you can edit/add to.

  Entries here appear in the **Account Type** dropdown in individual accounts in Chart of Accounts. See Customizing accounts.

- **Billing Rate Group**

  A Billing Rate Group is a parent structure that contains related billing rates as its children. Set up basic categories (groups), such as Standard, Preferred, and specific cases. After setting up groups, add billing rates (in Setup > Billing Rates) and attach entities. Firms, contacts, and parties to an order must be connected to a billing rate group.

- **Custodian Fee Name**

  Types of fees paid for records, such as custodian and notary fees. Custodian Fee Names appear on invoices with details on.

- **Payment Terms**

  The period during which an invoice must be paid without incurring any finance charges, such as Net 30 Days or COD (Cash on Delivery). Entries here appear in the **Payment Terms** dropdown in firms. See Entering additional firm information.

- **Payment Type**

  Categories of payment methods, e.g., check or credit card. Entries here appear in the **Payment Type** dropdown in Receive Payments.

- **Service Item Group**

  A service item group is a parent structure that contains related service items as its children. A service item must be connected to a particular service item group. These main categories in the Service Item Master are the most commonly used billable items for court reporters. These categories are preset in MR9 and cannot be modified by the user.

- **Transaction Type**

  Categories of transaction methods, e.g., payment or credit memo. Used in Receive Payments to distinguish how invoices are paid, whether via payment by a client or third party, a credit or debit memo, voiding or writing off an invoice, a duplicate payment, or a refund. These categories are preset in MR9 and cannot be modified by the user.

- **Unit Type**

  Describes a number of items having in common traits or characteristics that distinguish them as a group or class, e.g., pages, miles, or hours. Unit type is designated for service items in Service Item Master, and MR9 prints the unit type on detailed invoices next to the number of units.

Reference

- Five basic accounts
- Chart of Accounts
- Billing Rate Group
- Billing Rates
- Service Item Master
- Receive Payments

Step-by-step instructions

- Customizing lists
- Customizing accounts
- Entering additional firm information
- Creating billing rate groups
- Setting up billing rates

Connect

MR Connect is the MR9 plug-in that gives your clients direct access to your office via the internet.

For how to set up lists, see Customizing lists.

- **Ticket Rating**

  Designate the ratings MR Connect users select from to rate the service they received when closing their support tickets online.

- **Ticket Status**

  Designation specifying what stage an online support ticket is in, e.g., Awaiting Response or Closed. This list is not customizable.

Reference

- MR Connect

Step-by-step instructions

- Customizing lists

Invoice

MR9 invoices can be customized to your business.

For how to set up lists, see Customizing lists.

- ## Header Group

  A header group is a parent structure that contains related invoice headers as its children. MR9 automatically generates a standard invoice header for each invoice based upon the service items selected. Create your own custom headers for specific circumstances, and organize them into header groups to save you time locating one when billing.

- ## Invoice Type

  Categories for organizing invoices by source, purpose, function, etc., e.g., Interoffice Invoice or Affiliate Invoice. Use Invoice Type as an additional classification for searching invoices in Invoice Inquiry, Aged A/R, and Daily Register.

- ## Message Group

  A message group is a parent structure that contains related invoice messages as its children. Create your own custom messages for specific circumstances, and organize them into message groups to save you time locating one when billing.

- ## Notes Type

  Categories of notes, e.g., Call Made to Client or Mail Sent to Client, for classifying what an invoice note documents. Use as a filter when searching Invoice Notes Logs.

Reference

- Invoice Headers
- Invoice Messages
- Invoice Inquiry
- Aged A/R
- Daily Register
- Notes Logs

Step-by-step instructions

- Customizing lists
- Setting up invoice headers
- Setting up invoice messages

Orders

Orders in MR9 are usually a request for all records related to a case or to serve a subpoena for an appearance at a legal proceeding.

For how to set up lists, see Customizing lists.

- **Case Type**

  Categories of cases by work type, e.g., Medical Malpractice, Product Liability, or Personal Injury.

- **Custom Date**

  Categories of case-related dates other than trial dates — such as dates for depositions or mediation — so you can include these types of dates in orders.

- **For (Patient Type)**

  Designation specifying which side the attorney represents, e.g., Plaintiff or Defendant or other litigation party types. Appears in individual parties in orders.

- **Notes Type**

  Categories of notes, e.g., Case Notes or Client Call, for classifying what an order note documents. Use as a filter when searching Order Notes Logs.

- **Party Notes Type**

  Categories of notes, e.g., Case Notes or Marketing, for classifying what an ordering party note documents. Use as a filter when searching Order Party Notes Logs.

- **Received By**

  Designation specifying how an order were received: e.g. Mail or Fax.

- **Status**

  Designation specifying what stage the order is in, e.g., New or Cancelled. Used as a filter in Orders. Some categories are preset in MR9 and cannot be modified by the user. If you don’t need an Order Status but it cannot be deleted because it is an MR9 preset, click its **Active** slider to select No, so it won't appear in orders or as a filter in order searches.

Reference

- Orders
- Notes Log

Step-by-step instructions

- Customizing lists

Others

Miscellaneous categories to customize.

For how to set up lists, see Customizing lists.

- **Anniversary Type**

  Categories of events you want to remember for contacts, such as Birthdays or Wedding Anniversaries. (See Remembering important client dates.)

- **Communication Type**

  Designation specifying the manner by which notes in Notes Logs were received, e.g., System, Email, or Call.

- **Redemption Type**

  Designation specifying how clients can redeem award points in their MR9 accounts, e.g. Gift Certificate or Cash.

Reference

- Anniversary Inquiry
- Notes Log
- Award Points

Step-by-step instructions

- Customizing lists
- Remembering important client dates
- Keeping track of important client dates
- Managing contacts' award points

Parts

Parts are work orders for retrieving records, serving subpoenas, etc., related to a case/MR9 order.

For how to set up lists, see Customizing lists.

- **Action Type**

  Designation specifying what type of action to take in obtaining records.

- **Instructions**

  Designation specifying admissible status of records being sought.

- **Notes Type**

  Designation specifying what type of action took place. Used in searching Part Notes Logs.

- **Record Type**

  Categories of records, e.g., Medical or Billing, you are seeking at locations

- **Scheduling Type**

  Designation specifying method to be used for pickups, such as FedEx or pickup.

- **Status**

  Designation specifying what stage the order is in, e.g., New or Cancelled. Some categories are preset in MR9 and cannot be modified by the user. If you don't need a Part Status but it cannot be deleted because it is an MR9 preset, click its **Active** slider to select No, so it won't appear in orders or as a filter in order searches.

- **Subpoena For**

  Designation specifying what you are requiring from a location, such as documents or a person.

Reference

- Order
- Notes Log

Step-by-step instructions

- Customizing lists

Repository

A document (file) can be archived in MR9 by uploading it to the repository of a contact, firm, location, order, part, invoice, or record.

For how to set up lists, see Customizing lists.

- ## File Type

  In addition to which repository in MR9 a document (file) is stored, the file can be further categorized by type. Create your own custom file types that can be selected in the dropdown, e.g. Exhibit, Notice, or Delivery Receipt.

  File type is used to determine which files appear in different functions in MR9 or which types clients have access to. For each file type, slide **Show to Contact** to Yes to have files with that file type appear in their online repositories (if you have MR Connect).

Reference

- Repository
- System Preferences > Orders
- MR Connect

Step-by-step instructions

- Customizing lists
- Uploading files to a repository
- Customizing communications

Tracking

Customize tracking options so you can monitor orders as they move through your company's workflow. First, define what types of items/workflows you want to track, then define the steps in each workflow in Tracking Steps.

For how to set up lists, see Customizing lists.

- **Item**

  Types of items/workflows that you want to monitor, such as records or process serving.

- **Priority**

  Designation specifying order of importance or urgency. Typical priority codes are High, Normal, and Urgent.

NEXT: Set up each tracking item's workflow

After you list items/workflows to track, break down your process into steps for each item to follow. See Defining tracking steps.

Reference

- Tracking
- Tracking Item
- Tracking Steps

Step-by-step instructions

- Customizing lists
- Defining tracking steps

Users

Anyone who accesses MR9 must have a user account. Set up identifiers to help classify your staff.

For how to set up lists, see Customizing lists.

- **Department**

  Specialized division of your organization, e.g., Orders or Production.

- **Title**

  Designation specifying job or position, e.g., Manager or Staff.

Reference

- Users and Groups
- Users

Step-by-step instructions

- Customizing lists
- Creating users

Users

Users are people in your company who access MR9 directly, such as owners, managers, and staff.

NOTE: Your user account determines what you can do in MR9

A user account lets you access MR9 directly. In addition to program access, your user account authorizes what actions you can perform in MR9. See Creating user accounts.

Administrators set up user accounts for anyone who needs to access MR9, and assign users to different groups, which authorize what actions users can perform in MR9 and what kinds of notifications and messages they receive. See Managing groups.

Reference

- Groups

Step-by-step instructions

- Creating user accounts
- Managing groups

Managing users

You can add, edit, and delete users.

1. Access users

1. **Setup > Users and Groups**
2. In the Users and Groups window, all active users are listed in the **Users** pane's grid. To see all users, click **Show Inactive Users.**
3. To view a user's information, click:
   - **> View**
   - Hyperlinked name

2. Add new user

To add new users, see Creating user accounts.

3. Update user

- **To update general work-related information** about the user, such their order title, see Entering & updating general user information.
- **To update personal information** about the user, such as their home address, see Entering & updating personal user information.
- **To manage a user's group memberships,** see Managing user's group memberships.
- **To update the user's associated business units** in your company, see Managing user's BUs.
- **To unlock a user's account,** see Unlocking user accounts.
- **To reset a user's password,** see Resetting passwords. (Users can also reset their own passwords. See Setting your password at log-in and Updating your password.

4. Delete user

1. In the **Users** pane locate the user to be deleted and click their:
   - **> Delete.** *(If a user cannot be deleted, this option is not available.)*

- **> View/Edit** or the hyperlinked name. Then in the View User/Edit User window, click **Delete.** *(If a user cannot be deleted, this button is disabled.)*

2. Click **Yes** in the popup.

Reference

- Groups
- Users
- Business units

Step-by-step instructions

- Creating user accounts
- Entering & updating general user information
- Entering & updating personal user information
- Managing user's group memberships
- Managing user's BUs
- Unlocking user accounts
- Resetting passwords
- Setting your password at log-in
- Updating your password

Entering general user information

Enter work-related info about the user.

Continued from Creating user accounts or Managing users.

1. In the New User/Edit User window's **General** pane, enter text in fields or make selections:

   - **First Name**

     User's given name

   - **Mi.**

     User's middle name or initial

   - **Last Name**

     User's family name

   - ***Full Name**

     Required. Select the naming convention you use for user accounts in the dropdown.

   - **Email**

     User's work email address. Click ✉ to send email directly to user. See Composing emails.

   - **Work Phone**

     User's phone number you prefer to call for work-related issues

   - **Account is locked out**

     If a user has made too many incorrect attempts to log into MR9, the system will lock them out. Slide to No to allow the user to log in again. The number of incorrect attempts is set in System Preferences > General > Login.

   - **Active**

     Yes is selected by default. If you no longer need to contact or assign the user anymore, slide to No. The user will remain in the database but no longer appear in lists of users.

   - ***Login Name**

     Required. If you are not using email addresses for login, a unique user name can be entered here.

   - **Reset Password**

     If the user lost their password or otherwise needs a new password for MR9:

1. Click **Reset Password.**
2. In the **Reset Password** panel, enter their new password in both ***New Password** and ***Confirm New Password** *(both required).*
3. Click **Save.**

- **Date Started**
  User's date of employment/contract commencement with your company
- **Date of Termination**
  If applicable, date of user's employment/contract termination with your company
- **Title**
  User's job title. (Titles and default are set in Lists > Users.)
- **Department**
  Specialized division of your organization. (Departments and default are set in Lists > Users.)
- **Company**
  If user works for a different company, you can enter the company name. (This is not the same as business units.)
- **Manager**
  User's supervisor
- **Notes**
  Any information about the user not covered in other fields/selections

2. In the New User/Edit User window, click **Save.**

Reference

- Login preferences
- Users lists
- Business units

Step-by-step instructions

- Creating user accounts
- Managing users
- Composing emails

Entering & updating personal user information

Enter/update a user's personal contact info and date of birth.

Continued from Creating user accounts or Managing users.

1. In the New User/Edit User window, scroll or jump to the **Personal Info** pane. Enter text in fields or select options:

   - **Home Address**

     User's street address only

   - **City/State/Country/Zip**

     Do not enter the user's city, state or country. Instead, enter the user's postal code (zip code) in **Zip,** then click . MR9 will automatically populate the other address fields.

   - **Birth Date**

     User's date of birth

   - **Home Phone**

     User's landline number

   - **Mobile Phone**

     User's cellphone number

   - **Mobile Vendor**

     Select the wireless carrier for the user's cellphone from the dropdown.

2. In the New User/Edit User window, click **Save.**

Reference

- Lookup panel
- Date Navigator

Step-by-step instructions

- Creating user accounts
- Managing users

Entering pay information

Specify a sales rep's pay details.

Continued from Creating user accounts or Managing users.

1. In the New User/Edit User window, scroll or jump to the **Pay Info** pane.
2. Enter a percentage for sales commissions in **Commission Rate.**
3. Click **Save.**

Reference

- Sales Rep

Step-by-step instructions

- Creating user accounts
- Managing users

Managing users' group memberships

At minimum a user must be a member of one security group — but can be in an unlimited number of security and message groups. Set up groups first, then add members.

Continued from Creating user accounts or Managing users.

1. In the Edit User window, scroll or jump to the **Groups** pane.

- **To add the user to a group:**

  1. In the **Groups** pane, click .
  2. In the **Add Groups** panel, all of your MR9 groups are listed (see Managing groups). Check the box(es) of group(s) the user should join.

- **To delete the user from a group:**

  1. In the **Groups** pane, check box(es) of the group(s) you want to remove the user from.
  2. Click .
  3. Click **Yes** in the popup.

2. In the Edit User window, click **Save.**

TIP: Quickly add/delete multiple group members

If you have multiple users to add to or delete from a group, do these tasks at the group level instead of the individual user level to save time. See Adding or deleting group members.

Reference

- Results pane

Step-by-step instructions

- Creating user accounts
- Managing users
- Managing groups
- Adding or deleting group members

Resetting passwords

Administrators do not have a way to retrieve user passwords, so if a user forgets their password, the password has to be reset. Administrators can reset individuals' passwords, or the user can reset their password (see Setting your password at log-in and Updating your password).

1. **Setup > Users and Groups**
2. In the **Users** grid click the user's:
   - **> Edit.**
   - Hyperlinked name. Then in the View User window, click **Edit.**
3. In the Edit User window, click **Reset Password.**
4. In the **Reset Password** panel, enter a strong password in the ***New Password** and ***Confirm New Password** *(both required),* then click **Save.**

NOTE: Users can reset their own password

Basic security guidelines include passwords, and we encourage strong passwords for better account protection. However, MR9 also allows individual users to reset their own password in 2 ways:

- **Before log in** – See Setting your password at log-in.
- **Inside MR9** – See Updating your password.

Reference

- System Preferences > General> Login
- Strong password

Step-by-step instructions

- Setting your password at log-in
- Updating your password

Unlocking user accounts

MR9 follows best business practices to protect the system from hacking and other unauthorized access. One way you are protected is with account locking, in which MR9 locks out a user after a set amount of failed login attempts.

If a user has been locked out due to failed login attempts, the account must be unlocked by an administrator.

1. **Setup > Users and Groups**
2. In the **Users** grid click the locked-out user's:
   - **> Edit.**
   - Hyperlinked name. Then in the View User window, click **Edit.**
3. In the Edit User window, Yes is selected in the **Account is locked out** slider. Slide to No.
4. Click **Save.**

TIP: Unlocking contact accounts

If a contact has been locked out of MR Connect due to too many failed login attempts, unlock their account in the **Additional** pane of their entity listing. See Entering additional contact information.

NOTE: Set account locking

In System Preferences > General > Login, protect user accounts from hacking attempts by selecting a number in the **Account will be locked up, after this number of tries** dropdown to allow a set amount of incorrect login attempts before MR9 locks out the user.

Reference

- System Preferences > General> Login

Step-by-step instructions

- Managing users
- Customizing global preferences
- Entering additional contact information

Looking up users

Look up users to assign to different roles — such as Processor, Sales Rep, Client Rep, Expeditor, Runner, Collector, or Assign To – in orders, parts, firms, contacts, locations, and overdue invoices. Then search those functions by users in these roles. Find client payments and invoices in collections by the user who entered them in the system.

1. To find a user in MR9 to assign or to search by, click a user related field's (or **> Lookup User).**
2. In the **Lookup User** panel, all active MR9 users are listed.
   - **To narrow the results shown:** Enter a partial user name in **Search Criteria.**
   - **To search your entire user database:** Slide **Show Active Only** to No.
3. If you used the search filters, click . All users that meet the search criteria appear in the results pane.
4. Click a user's hyperlinked name in the results pane to select it. If the user does not appear in the list, see Creating user accounts.

Reference

- Processor
- Sales Rep
- Client Rep

Step-by-step instructions

- Creating user accounts

Processor

Processor refers to the MR9 user who is assigned as the case coordinator to process an order.

Reference

- Order

Step-by-step instructions

- Searching orders
- Entering general order information

Client Rep

Client Rep refers to the representative who oversees orders on behalf of the client — as opposed to sales reps who are your account executives.

Reference

- Sales Rep
- Marketing Inquiry

Step-by-step instructions

- Entering firm marketing information
- Entering contact marketing information

Sales Rep

Sales Rep refers to users who are your sales representatives or account executives. Sales Reps are different from Client Reps who oversee orders on behalf of their clients.

Reference

- Client Rep
- Marketing Inquiry

Step-by-step instructions

- Searching orders
- Entering additional order information
- Searching firms
- Entering firm marketing information
- Searching contacts
- Entering contact marketing information
- Keeping track of important client dates
- Finding highest commissioned sales reps

Groups

Groups grant permission to users for which actions they can perform in MR9 and what kinds of notifications and messages they receive.

NOTE: 2 types of groups in MR9

Administrators assign users to one or more groups, depending on what access and notices each user needs.

- **Message**

  Members can send a message to all other members in a group simultaneously.

- **Security**

  Permissions for actions come from which security group(s) you belong to. A user must be a member of at least one security group but can be a member of multiple security groups. The permissions and rights granted to a security group are assigned to all of its members.

IMPORTANT: Restrict Users and Groups access to administrators only

Due to the sensitivity surrounding user account administration, limit access to Users and Groups to users in the Administrators Security Group.

Reference

- Users
- Message groups
- Security groups

Step-by-step instructions

- Managing groups
- Communicating within MR9

Message groups

Message groups are custom groups you set up in MR9 so that you can send a message to all the members of a group simultaneously. Other members can also send messages to the group.

TIP: Send group messages to save time

In MR9's Notifications and Messages window, you can send messages to individual users and/or message groups. See Communicating within MR9. Set up message groups, such as "Managers," "Everyone," and "Orders," so that you or other members can send a message to the whole group at once. See Managing groups.

Reference

- Users
- Security groups

Step-by-step instructions

- Managing groups
- Creating user accounts
- Communicating within MR9

Security groups

Permissions for actions come from which **security group(s)** a user belongs to. A user must be a member of at least one security group, and can be a member of multiple groups. The permissions and rights granted to a security group are assigned to all of its members.

TIP: Default groups might be all you need

Default security groups are included in MR9. These built-in groups have been granted useful collections of rights and permissions. Individual users can be members of multiple security groups, so if someone's responsibilities overlap different areas, such as someone who oversees both orders and billing, administrators can give that person access to both areas through membership in different security groups.

In most cases, built-in groups provide all of the capabilities needed by a particular user but you can add your own groups, if needed. See Managing groups.

Reference

- Users
- Message groups

Step-by-step instructions

- Setting security group permissions
- Managing groups

Creating groups

Add new security groups with their own permissions and users if the default security groups provided with MR9 are not enough. You can also add message groups. You can add multiple users at once to a group.

Continued from Managing groups.

1. In the Users and Groups window, with **Message Groups** or **Security Groups** selected, click **New.**
2. In the New Message Group/New Security Group window, enter a unique name for the new group in ***Group Name** *(required).*
3. Enter information about the group's purpose in **Description,** if desired, to help users understand how to use the group.
4. Click **Save.**
5. The window changes to an Edit window and the **Members** pane and **Accessibility** pane (in Security groups) appear. To:

   - **Add members**

     See Adding or deleting group members.

   - **Set security group permissions**

     See Setting security group permissions.

Reference

- Message groups
- Security groups

Step-by-step instructions

- Managing groups
- Creating user accounts
- Setting security group permissions
- Adding or deleting group members

Updating groups

In addition to adding and removing group members, you can edit group descriptions. You can also edit names of groups you created or delete the group itself. Plus you can customize users access to areas of MR9.

Continued from Managing groups.

In the View Message Group/View Security Group window, update the group's information. To:

- **Edit group description**

  1. Edit or enter text in **Description.**
  2. Click **Save.**

- **Edit group name**

  Except the 2 default Security Groups

  1. Edit or enter text in ***Group Name** (required).*
  2. Click **Save.**

- **Customize access**

  Only security groups

  To designate who can do what actions in MR9, see Setting security group permissions.

Reference

- Groups
- Users
- Message groups
- Security groups

Step-by-step instructions

- Managing groups
- Adding or deleting group members
- Setting security group permissions

Setting security group permissions

An important security feature of MR9 is the ability to limit security groups to accessing specific functions plus performing only the actions which you assign them. Set security group access and permissions first, then add users to the groups.

Continued from Managing groups or Creating groups.

1. If not already in an Edit Security Group window, select **Security Groups** in the Users and Groups window **(Setup > Users and Groups).** Locate the security group you want to manage and click its:
   - **> Edit**
   - **> View.** Then in the View Security Group window, click **Edit.**
   - Hyperlinked **Group Name.** Then in the View Security Group window, click **Edit.**
2. The **Accessibilty** pane lists all MR9 functions.
   - Check a function's **Access** box to allow members of the group to access the function.
   - Uncheck a function's **Access** box to block group members from the function. The function will not appear in the security group members' MR9.
3. Give group members the ability to use accessible functions by checking their **Edit & Delete** boxes.
   - If an accessible function's checkbox is blank, users can view the function but not update its contents.
   - If a function does not have an **Edit & Delete** box, users can use it if they are granted access to it.

   NOTE: Changes take affect after logging back into MR9

   If access or permission changes affect you, you must log out and log back in to update your security group privileges.
4. After setting group permissions, add users to the group. See Adding or deleting group members.

Reference

- Groups
- Users
- Message groups
- Security groups

Step-by-step instructions

- Creating user accounts
- Managing groups
- Creating groups
- Adding or deleting group members

Adding or deleting group members

Add members to or delete them from all groups.

Continued from Managing groups or Creating groups.

- ## Add members to group

  Add members to security groups and message groups.

  1. In the Edit window of a group you want to add members to, click ⊞ in the **Members** pane header.
  2. In the **Add Members** panel, all MR9 users that have been added to the database appear. (If a user is missing, see Creating user accounts.) Check the box(es) of the member(s) you want to add or check the box next to **User** in the header to select all.
  3. Click **Save.** The additional members are listed in the **Members** pane of the Edit window.
  4. In the Edit window, click **Save** or **Cancel** to close the window.

- ## Remove members from group

  Remove members from security groups and message groups.

  1. To delete member(s) from the group, check their box(es) in the **Members** pane of the Edit window, or check the **User Name** box in the header of the **Members** pane to select all members.
  2. Click ⊖.
  3. Click **Yes** in the popup window that appears.
  4. In the Edit window, click **Save** or **Cancel** to close the window.

TIP: See who's an active user at a glance

Any MR9 users who are active users are indicated by a checkmark next to their user name in the **Members** pane. If you want to activate or de-activate a user, see Entering general user information.

Reference

- Groups
- Users
- Message groups
- Security groups

Step-by-step instructions

- Managing groups
- Creating groups
- Creating user accounts

Service items

Regular charges that you bill to your clients are called **service items** in MR9. Service items are listed on your invoices to provide itemized details for your clients and third-party payers. In-house, they provide information to help you analyze your revenue streams.

Reference

- Service Items Master
- Service Items Subgroups

Step-by-step instructions

- Organizing service items
- Adding service items

Service Groups

The main categories in the Service Items Master List, called **Service Groups,** are the most commonly used billable items for your industry. These main categories are preset by the system and cannot be modified by the user.

MR9 Service Groups

1. Original
2. Copy
3. Custodian Fee
9. Misc. Charge

Reference

- Service Items Master
- Service Items Subgroups
- Service items

Step-by-step instructions

- Organizing service items
- Adding service items

Updating service items

You can update service item rates and options. You can also delete service items that are no longer needed or merge them into other service items.

1. **Setup > Service Item Master**
2. Click to see all service items or select options in **Search By** to limit the results before clicking :
   - **Service Group**

     Default is ALL. Select a group in the dropdown to only see items in a single group.
   - **Service Subgroup**

     Default is ALL. To restrict results, first select a group in **Service Group,** then select a subgroup in this dropdown. (See Organizing service items.) Only those service items belonging to the selected subgroup appear in the **Service Item** dropdown below.
   - **Service Item**

     Enter part of a service item name.
   - **Show Active Only**

     Default is Yes. Leave as the default if you don't want to see service items that you have hidden from service item lists. If you want to see all service items, slide to No.
3. MR9 lists all service items that meet your search criteria. To:
   - **View a service item**
     1. In the Service Item Master window, click the service item's:
        - **> View.**
        - Hyperlinked **Service Item** name.
     2. To return to the main window click **Close.**
   - **Modify a service item**
     1. In the Service Item Master window, click the service item's:
        - **> Edit.**
        - **> View** or hyperlinked **Service Item** name. In the View Service Item window, click **Edit.**

2. To update billing and related options for a service item, see Entering/updating billing rates.
3. To change billing in multiple billing rate tables at once, see Updating rates in batches.
4. If you have clients who require that invoices be submitted electronically (e-billing), fill in the fields in **LEDES 1998B** pane. See Entering UTBMS codes for service items.
5. When finished updating the service item, click **Save** in the Edit Service Item window.

- **Delete a service item**

1. In the Service Item Master window, click the service item's:
   - **> Delete.** *(If a service item cannot be deleted, this option is not available.)*
   - **> View/Edit** or the hyperlinked **Service Item** name. In the View Service Item/Edit Service Item window, click **Delete.** *(If a service item cannot be deleted, this button is disabled.)*
2. Click **Yes** in the popup.

- **Merge a service item**

  See Merging data.

Reference

- Service items
- Service Item Subgroups
- Electronic billing

Step-by-step instructions

- Organizing service items
- Entering/updating billing rates
- Entering UTBMS codes for service items
- Merging data
- Updating rates in batches

Entering/updating billing rates

You can enter default rates and options for service items in the Service Item Master, then change them for specific situations by creating different rate tables with custom rates for the service items in Billing Rates. Not all options are available to update in all tables.

You can also edit billing rates for specific invoices when turning in and billing parts. (See Adding & updating individual service items.) Edits made to rates in invoices will apply to those invoices only — they will not affect the billng rate table they were taken from. To edit billing rates for future use, edit the defaults in the Service Item Master and/or specific billing rate tables in Billing Rates.

Continued from Adding service items, Updating service items, or Creating billing rate tables.

1. Set defaults

In the New/Edit window, Service Group is uneditable and some other options do not appear or are not editable.

- **Service Subgroup**

  Editable in Service Item Master: 9. Misc. Charges Service Group only
  Select an appropriate subgroup in the dropdown. (See Organizing service items.)

- **Service Item**

  Editable in Service Item Master: 9. Misc. Charges Service Groups only
  Required. Type the description to appear on invoices. The maximum length of this field is 128 characters.

- **Unit Type**

  In Service Item Master only
  Select the category in the dropdown for the billable units of this service item. MR9 prints the unit type on detailed invoices next to the number of units. (Unit Types and default are set in Lists > Accounting.)

- **Account No.**
  In Service Item Master only
  Select an appropriate (revenue) account in the dropdown. (Accounts are set up in Chart of Accounts.)

- **Active**
  In Service Item Master only, editable in 9. Misc. Charges Service Group only
  Default is Yes. Slide to No when you no longer need to see the item in lists.

- **Billing Rate**

  Enter the amount you charge per unit.

- **Markup Type**
  If you add a markup on the service item, select whether it's by a percentage of the billed amount (%) or a fixed dollar amount ($) in the dropdown.

- **Markup**
  Enter the percentage or dollar amount you mark up the billable amount.

2. **Check options**

   Slide to Yes if:

- **Court Taxable**
  Service item is a taxable court cost. (Generally, taxable court costs are awarded to the winning side in a lawsuit and are intended to defray the legal expenses of the successful litigant. Used in Texas only.)

- **Sales Taxable**
  Service item is sales taxable.

- **Discountable**
  You provide negotiated discounts for certain clients and the service item is discountable.

- **Pointable**
  You award clients points for ordering services and the service item is worth points. The default amount of points for any pointable service is "1." To increase that number for any client, see Managing contacts' award points.

- **Sales Rep Commissionable**
  You have sales representatives (account executives) and the service item is commissionable.

- **Show text on invoice**

  In Service Item Master: 9. Misc. Charges Service Group & Billing Rates only
  You want to print the Service Item Name when an invoice is printed with "no details." If invoices are printed with details, this is ignored.

- **Show amount on invoice**

  In Service Item Master: 9. Misc. Charges Service Group & Billing Rates only
  You want to print the amount when an invoice is printed with "no details." If invoices are printed with details, this is ignored.

- **Show on web orders**
  In Service Item Master only
  You want to make the service item available for clients to request when they are scheduling online using MR Connect.

- **Show on production sheet**
  In Service Item Master only
  You want to show the service item on production sheets. Leave set to No if this item does not concern the production department.

3. Save service item

- **In New Service Item,** click **Save >**
  - **Save & New:** To save the service item and add another.
  - **Save & Close**: When you have no more service items to add.
- **In Edit Service Item panel,** click **Save.**

NOTE: Need to update rates across multiple tables?
Use MR9's Mass Update function to change billing rates in multiple billing rate tables at once. See Updating rates in batches.

Reference

- Service items
- Service Groups
- Service Item Subgroups
- Lists > Accounting
- Chart of Accounts
- Award points
- Sales Rep
- MR Connect

Step-by-step instructions

- Adding & updating individual service items
- Adding service items
- Updating service items
- Creating billing rate tables
- Applying billing rates to one or more invoices
- Organizing service items
- Setting up billing rates
- Managing contacts' award points
- Entering general record information
- Updating rates in batches

Updating rates in batches

If you have multiple tables that need the same rate or option changed, use Mass Update.

1. In the Edit Service Item window, update the information if needed. See Entering/updating billing rates and Entering UTBMS codes for service items.
2. Click **More >**
   - **Mass Update for Billing Rates:** To update rates and options in billing rate tables in more than one Billing Rate Group.
3. In the **Mass Update for Billing Rates – Step 1** panel, default is No. Slide to Yes for information that should be copied from the service item.
4. Click **Next.**
5. In the **Mass Update for Billing Rates – Step 2** panel, check box(es) for which group(s) should be updated.
6. Click **Update.**
7. If you made any changes to the Service Item, a popup will appear. Click **Yes.**

Reference

- Service Items
- Billing Rates
- Billing Rate Group
- Results pane

Step-by-step instructions

- Organizing service items
- Entering/updating billing rates
- Entering UTBMS codes for service items

Entering UTBMS codes for service items

For invoices to be LEDES compliant, every service item on each invoice must be coded properly with UTBMS codes. If your client has not provided the codes, you can obtain them at utbms.com, or use the sub-set, ABA Litigation Code Set.

Continued from Adding service items or Updating service items.

1. In the New Service Item/Edit Service Item window, scroll or jump to the LEDES 1998B section:

   - **Exp/Fee Type**
     Select Expense if this is an expense item such as delivery. Select Fee if this is a timekeeper fee such as attendance fee.

   - **Task Code**
     Enter the task code (e.g., L330) if this is a fee item. Leave blank for an expense item.

   - **Expense Code**
     Enter the expense code (e.g., E115) if this is an expense item. Leave blank for a fee item.

   - **Activity Code**
     Enter the activity code (e.g., A109) if this is a fee item. Leave blank for an expense item.

2. Click **Save.**

3. If you already have billing rate tables that use this service item, update them to include the expense/fee type and UTBMS codes. See Updating rates in batches.

TIP: Using non-standard codes

Even though it might be rare, it is possible for an insurance company to require different codes than the standard. In that case, simply update the billing rate tables belonging to the insurance company without modifying the service item master list. See Creating & updating billing rate tables.

Reference

- Electronic billing
- LEDES format
- UTBMS codes
- ABA Litigation Code Set
- Billing Rates

Step-by-step instructions

- Exporting invoices in LEDES format
- Adding service items
- Updating service items
- Setting up billing rates
- Updating rates in batches
- Creating & updating billing rate tables

ABA Litigation Code Set

The standard litigation code set adopted by the ABA:

L100 Case Assessment, Development and Administration

L110 Fact Investigation/Development
L120 Analysis/Strategy
L130 Experts/Consultants
L140 Document/File Management
L150 Budgeting
L160 Settlement/Non-Binding ADR
L190 Other Case Assessment, Development and Administration

L200 Pre-Trial Pleadings and Motions

L210 Pleadings
L220 Preliminary Injunctions/Provisional Remedies
L230 Court Mandated Conferences
L240 Dispositive Motions
L250 Other Written Motions and Submissions
L260 Class Action Certification and Notice

L300 Discovery

L310 Written Discovery
L320 Document Production
L330 Depositions
L340 Expert Discovery
L350 Discovery Motions
L390 Other Discovery

L400 Trial Preparation and Trial

L410 Fact Records
L420 Expert Records
L430 Written Motions and Submissions
L440 Other Trial Preparation and Support
L450 Trial and Hearing Attendance
L460 Post-Trial Motions and Submissions
L470 Enforcement

L500 Appeal

L510 Appellate Motions and Submissions
L520 Appellate Briefs
L530 Oral Argument

A100 Activities

A101 Plan and prepare for
A102 Research
A103 Draft/revise
A104 Review/analyze
A105 Communicate (in firm)

A106 Communicate (with client)
A107 Communicate (other outside counsel)
A108 Communicate (other external)
A109 Appear for/attend
A110 Manage data/files
A111 Other

E100 Expenses

E101 Copying
E102 Outside printing
E103 Word processing
E104 Facsimile
E105 Telephone
E106 Online research
E107 Delivery services/messengers
E108 Postage
E109 Local travel
E110 Out-of-town travel
E111 Meals
E112 Court fees
E113 Subpoena fees
E114 Record fees
E115 Deposition transcripts
E116 Trial transcripts
E117 Trial exhibits
E118 Litigation support vendors
E119 Experts
E120 Private investigators
E121 Arbitrators/mediators
E122 Local counsel
E123 Other professionals
E124 Other

Reference

- Electronic billing
- LEDES format
- UTBMS codes

Step-by-step instructions

- Exporting invoices in LEDES format
- Entering UTBMS codes for service items

Creating & updating billing rate tables

Create billing rate tables from scratch or from an existing table. If you copy a table to create a new table, the existing table's rates and details are duplicated in the new table for you to update. Revise existing tables as needed.

Continued from Setting up billing rates or Copying billing rate tables.

1. Enter/update basic details

1. In the New Billing Rate/Edit Billing Rate window/panel:

   - **Billing Rate Group**
     Default group appears (set in Lists > Accounting). Select a different billing rate group in the dropdown, if the new billing rate table should be in a different category.

   - ***Billing Rate Name**
     Required. Enter/edit the description of what the rate table covers. Make the description easy for your billing staff to understand when it should be used.

   - **State**
     If you charge different rates for different states, select the state code in the dropdown. Otherwise, leave blank.

   - **City**
     If you charge different rates for different cities, enter the city name. Otherwise, leave blank.

   - **Active**

     Yes by default. Slide to No to have billing rate table hidden in dropdowns.

   - **Remarks**

     Enter any relevant notes or comments.

2. Click **Save.** If this is a new table, the New Billing Rate window changes to Edit Billing Rate and adds the **Service Item** pane.

2. Enter/update rates

1. In the Edit Billing Rate window, scroll or jump to **Service Item** pane.

2. **To enter or update billing rates and options,** click any hyperlinked **Service Item.** See Entering/updating billing rates.

3. Click **Save.**

NOTE: Tying billing rates to entities

You connect the billing rates to firms, contacts, parties to an order, and invoices. You can do this when you set them up or at any time afterwards. Contacts inherit billing rate tables from their firms but you can select different tables for contacts from their firm's. Parties will default to the billing rate tables in their contact profile. You can override the default when adding parties to orders or when turning in parts. Invoices will in

NEXT: Set up Billing Sets

After setting up billing rates, set up billing sets — preset groups of service items that speed up the billable services selection process because you only have to choose the set, not each of the items individually.

Reference

- Billing Rate Groups
- Lists > Accounting
- Firms
- Contacts
- Parties
- Service Items

Step-by-step instructions

- Setting up billing rates
- Copying billing rate tables
- Entering/updating billing rates

Copying billing rate tables

Copy and update an existing table to create a new table quickly.

1. Find table to copy

1. **Setup > Billing Rates**
2. Click to see all of your active existing tables. Or restrict the results using one or more search criteria before clicking :
   - **Billing Rate Group**

     Default is ALL. Click to restrict the search to one group or several. See Lookup panel.
   - **State**

     Default is ALL. Click to restrict the search to one state or several.
   - **City**

     Enter part of the city name.
   - **Billing Rate Name**

     Enter part of the billing rate name.
   - **Show Active Only**

     Default is Yes. To search all billing rates, slide to No.

2. Copy table

1. To copy a billing rate table, click its:
   - **> Edit.**
   - **> View.** Or its hyperlinked **Billing Rate Name.** Then in the View Billing Rate window, click **Edit.**
2. Click **More > Copy & New.**

3. Update info

In the New Billing Rate window, ***Billing Rate Name** *(required)* is blank but the rest of the rate table is copied. To update the billing rate, see Creating & updating billing rate tables.

Reference

- Billing Rate Groups
- Lookup panel

Step-by-step instructions

- Creating & updating billing rate tables

Billing Rate Group

A **Billing Rate Group** is a parent structure that contains related billing rates as its children. Firms, contacts, and parties to be invoiced must be connected to a Billing Rate Group.

Billing Rate Group examples

- Different tiers of clients (such as your preferred clients)
- A particular firm
- A contact at a firm
- A case

Reference

- Billing Rates
- Firm
- Contact
- Parties
- Lists > Accounting

Step-by-step instructions

- Creating billing rate groups

Creating billing rate groups

It is not unusual to have more than 100 billing rate tables in your MR9 system to accommodate different clients' needs, contract terms, and third-party requirements. To minimize the time it takes to locate a particular rate table when billing, organize your rate tables into logical groups called Billing Rate Groups. Then when billing, you only have to scroll through the rate tables in one of these groups, instead of your entire list of rate tables.

1. **Setup > Lists > Accounting**
2. Click **Billing Rate Group.**
3. You can create new groups, edit, delete or merge groups, except the Standard Billing Rate Group, which is included in MR9 and cannot be deleted or merged. For how to set up billing rate groups, see Customizing lists.

TIP: Set up groups based on client/case pricing

Rates charged to your average clients (known as *rack rates)* should be in rate tables in the Standard Billing Rate Group. If you have a client (or case) that requires special pricing, create a new billing rate group first. Then connect the client (or case) to that billing rate group. See Setting up billing rates.

NEXT: Add billing rate tables to billing rate groups

After you have set up your billing rate groups, you can add billing rates in tables attached to a billing rate group. For each billing rate group, create as many billing rate tables as you need.

Reference

- Billing Rates
- Firm
- Contact
- Parties
- Lists > Accounting
- Service Item Master

Step-by-step instructions

- Customizing lists
- Setting up billing rates

Managing billing sets

Edit or delete billing sets, and save time creating new sets by copying and updating an existing set.

1. **Setup > Billing Sets**
2. Click to see existing billing sets. Or enter part of a billing set name in **Billing Set Name** before clicking to limit the search.
3. To manage a billing set from the results grid click its:
   - **> Edit.**
   - **> View** or the hyperlinked **Billing Set Name.** Then in the View Billing Set window, click **Edit.**
4. In the Edit Billing Set window to:
   - **Change the order of service items in the set**
     Click or next to an item to move it up or down in the list. *(Applies to 9. Misc. Charges service items only.)*
   - **Update an item in the set**
     Click its hyperlink, then make changes in the **Edit Service Item** panel and click **Save.**
   - **Delete an item from the set**
     Click its hyperlink, then click **Delete** in the **Edit Service Item** panel. Click **Yes** in the popup.
   - **Create another billing set from this one**
     Click **More > Copy & New** in the Edit Billing Set window. Enter a new ***Billing Set Name** *(required)* and update the other information as needed.

TIP: Delete unneeded billing sets

If you set up a billing set and later determine you don't need it, delete it to keep your list of billing sets managable.

1. To delete a billing set:
   - **From the Billing Sets main screen,** find the billing set you want to delete and click its **> Delete.**
   - **In a View Billing Set/Edit Billing Set window**, click **Delete.**

2. Click **Yes** in the popup.

Reference

- Service items

Step-by-step instructions

- Setting up billing sets

Setting up scopes

Set up new scopes at any time as needed. You can also edit or delete existing scopes.

1. **Setup > Scopes**
2. Click **New.**
3. In the New Scope window, enter or select options:
   - **Record Type**

     If default is not the correct record type, click ▾ and select the category the scope falls in from the dropdown list. (Record Types and default are set in Lists > Parts > Record Type.)
   - ***Scope**

     Required. Enter a description of the scope that will appear on documents.

     To include a data field in the description, click your cursor in the text where you want the data field, then click [▪] ▾ **> [category] > [data field].** The data fields available are contextual, meaning that only data fields relevant to scopes are listed.
4. Click **Save >**
   - **Save & New:** To continue adding scopes.
   - **Save & Close:** When finished adding scopes.

Reference

- Lists > Parts > Record Type

Step-by-step instructions

- Managing scopes

Organizing with form types & groups

Your industry requires many different types of form letters and other documents that contain a mix of boilerplate text and information from your MR9 database. MR9 comes with a set of form templates for these purposes that you can use as is, customize, add to, and delete.

You can easily have 100s of form templates that you store in MR9. To make it easier to find the template you need, you organize form templates under categories called Form Types. If you have too many related templates in one category, add subcategories called Form Groups to that Form Type. Then organize the related templates into these Form Groups so they are easier to locate when assembling form packages.

1. **Setup > Form Types and Groups**
2. MR9 displays all current form types (main categories) in the results pane. To:
   - **Find a specific form type** — Enter all or part of its name in the **Form Type** field in the **Search By** pane and click .
   - **View a form type's details,** including its form groups (subcategories) – In the results pane click its **> View.** Or click its hyperlinked **Form Type** name.
   - **Update a form type** – In the results pane click its **> Edit.** Or click **Edit** in its View Form Type window. See Editing form types.
   - **Delete a form type** – In the results pane click its **> Delete.** Or click **Delete** in its View Form Type/Edit Form Type window. Then click **Yes** in the popup that appears.
   - **Add a form type** – To add a new category for organizing form templates, see Adding form types.
3. To add subcategories to the form type, see Adding form groups.
4. To add form templates to a form type and/or its form groups, see Creating/updating forms & letters.

Reference

- Form Templates
- Form Groups

Step-by-step instructions

- Editing form types
- Adding form types
- Adding form groups
- Creating/updating forms & letters

Editing form types

Update any form type as needed. Change options. Add and modify subcategories to better organize form templates.

Continued from Organizing with form types & groups.

1. In the Edit Form Type window, update information and options:

   - ***Form Type**

     Required. Label for the category of forms.

   - **Billing Form**

     Uneditable. For an explanation of this siider, see Adding form types.

   - **Send To**

     If **Billing Form** is set to No, you can select the category of entity the forms in the category are for:

     - **Locations** – Default. For custodians of records or people who are named in subpoenas.
     - **Scheduling Party** – For clients who order records or subpoena services.
     - **Selected Parties** – For attorneys of record.

   - ***Dataset**

     Required. Works with **Billing Form** above.The group of data fields that will be included on packages of forms that include this form type.

   - **Printing Option**

     If **Billing Form** is set to No and depending on the **Dataset** chosen, you can choose an option:

     - **all parties at once** – The parties will be consolidated into a list.
     - **all parts at once** – The parts will be consolidated into a list.
     - **one party at a time** – Each party is printed separately.
     - **one part at a time** – Each part is printed separately.

2. To add form groups (subcategories) to the form type, see Adding form groups.
3. To add form templates to the form type and/or its form groups, see Creating/updating forms & letters.

4. To delete a form group, check its box in the **Form Groups** pane, then click . In the popup that appears, click **Yes.**

   ### WARNING: Deleting a form from a group deletes it from MR9

   If a form group you want to delete includes any form templates, a popup appears telling you to move or delete the form(s), then delete the form group. Deleting a form template from a form group deletes the template entirely from MR9 so if you want to keep the template but not in its current group, move it instead of deleting it.

   - **To move form templates** to a different form type and/or form group, see Moving forms to other types/groups.
   - **To delete form templates,** check their box(es) in the **Forms** pane, then click . In the popup that appears, click **Yes.** (You can also delete templates in Form Templates. See Creating/updating forms & letters.)

5. When finished updating the form type, click **Save** in the Edit Form Type window.

Reference

- Form Templates
- Form Groups

Step-by-step instructions

- Organizing with form types & groups
- Adding form types
- Adding form groups
- Creating/updating forms & letters
- Moving forms to other types/groups

Moving forms to other types/groups

You can reorganize form templates in form types by moving them to different form groups in the same or a different form type.

Continued from Editing form types.

1. To move one or more form templates to a different form type and/or form group, check their box(es) in the **Forms** pane in the Edit Form Type window, then click **> Move to other Form Type & Group.**
2. In the **Move to other Form Type & Group** panel, choose the category where you want the template(s) in the ***Form Type** dropdown *(required).*
3. If you want to move the template(s) to a subcategory in the selected form type, select the subcategory in the ***Form Group** dropdown. If you leave the field empty, the form template will move to the main category selected in ***Form Type.**
4. In the popup that appears, click **Yes.**

Reference

- Form Templates
- Form Groups

Step-by-step instructions

- Organizing with form types & groups
- Editing form types

Adding form types

If the default set of form types (categories) that come with MR9 aren't enough to properly organize your form templates, you can add your own form types.

Continued from Organizing with form types & groups.

1. To add a form type, click **New** in the Form Types and Groups results pane header.
2. In the New Form Type window, enter information and make selections:

- ***Form Type**

  Required. Label for the category of forms.

- **Billing Form**

  Default is No. Slide to Yes if this will be a category for organizing billing forms.

  IMPORTANT: Choose the right option before saving the form type

  The **Billing Form** setting determines whether the form type is used in Orders > Send Forms or Billing > Send Billing Forms. When the value changes, the available datasets below change. **The Billing Form choice selected here cannot be changed after saving this new form type.**

- **Send To**

  If **Billing Form** is set to No, you can select the category of entity the forms in the category are for:

  - **Locations** – Default. For custodians of records or people who are named in subpoenas.
  - **Scheduling Party** – For clients who order records or subpoena services.
  - **Selected Parties** – For attorneys of record.

- ***Dataset**

  Required. Works with **Billing Form** above.The group of data fields that will be included on packages of forms that include this form type.

- **Printing Option**

  If **Billing Form** is set to No, after selecting a dataset, choose an option. (Options vary depending on the dataset chosen.):

  - **all parts at once** – Consolidate all of the parts/locations to print as a list on one form.
  - **one part at a time** – Print each part on a separate form.

- **all parties at once** – Consolidate all of the parties to print as a list on one form.
- **one party at a time** – Print each party on a separate form.
- **one part & party at a time** – Print each part and party on a separate form.

3. Click **Save.**
4. In the popup that appears, confirm that you have made the choice in the **Billing Form** slider and click **Yes.**
5. The window changes to Edit Form Type and panes for **Form Groups** and **Forms** appear.
6. To add form groups (subcategories) to the form type, see Adding form groups.
7. To add forms to the form type and/or form groups, see Creating/updating forms & letters.
8. In the Edit Form Type window, click **Save.**

Reference

- Form Templates
- Send Forms
- Send Billing Forms
- Form Groups

Step-by-step instructions

- Organizing with form types & groups
- Adding form groups
- Creating/updating forms & letters

Adding form groups

If you have too many templates in a single form type to easily find form templates when working, add your Form Groups to the Form Type so you can break up the long list into easier chunks to work with.

Continued from Organizing with form types & groups, Editing form types, or Adding form types.

1. In an Edit Form Type window, any existing subcategories are listed in the **Form Groups** pane. To add subcategories to the Form Type, click in the **Form Groups** header.
2. In the **New Form Group** panel, enter a name for the subcategory in ***Form Group** *(required).*
3. Click **Save >**
   - **Save & New:** To add the form group to the **Form Groups** pane and continue adding subcategories to the main category.
   - **Save & Close:** When you are finished adding form groups.
4. To add forms to a Form Group, see Creating/updating forms & letters.

Reference

- Form Templates
- Form Groups

Step-by-step instructions

- Organizing with form types & groups
- Editing form types
- Adding form types
- Creating/updating forms & letters

Form Groups

MR9 includes a default set of categories that form templates are grouped under. You can further group form templates into subcategories, called **Form Groups,** to make managing and using templates easier.

Reference

- Form Templates

Step-by-step instructions

- Organizing with form types & groups

Modifying data list templates

When MR9 prints a list of parties or locations on documents, it uses preset data list templates to determine what data fields related to those parties/locations are included. You can edit these templates to better fit your company's needs.

1. **Setup > Form Data List Templates**
2. In the **Search By** pane, click to see all of the data list templates in MR9. Or click ALL in the **Form Type** dropdown and select a category, then click .
3. In the list of data list templates, to:
   - **View a template's details** – Click its **> View** in the Form Data List Templates results. Or click its hyperlinked **Data Name.**
   - **Edit a template** – Click its **> Edit** in the Form Data List Templates results. Or click **Edit** in its View Form Data List window.
4. In the Edit Form Data List window, you can edit the information in the ***List Template** field. To:
   - **Add data fields** – Click **> [category] > [data field].** The data fields available are contextual, meaning that only data fields relevant to template are listed.
   - **Add text** – Click in the field where you want the text, then enter the text.
   - **Delete data fields** – Highlight the field(s) you want to delete, then press **Delete** on your keyboard.
   - **Edit text** – Highlight the text, then delete it or type over it.
5. Select how entities (parties or locations) in the data list will line up on documents in the **Data Listing Method** dropdown:
   - **Next Line** – Default. Each entity starts on a new line.
   - **Delimiter ";"** – Entities are in one line separated by semicolons.
   - **Parallel Structure** – Entities are separated by a comma with an "and" before the last entry.
6. Click **Save.**

Reference

- Form Templates
- Results pane

Creating form packages

Packages are preset groups of forms that speed up the document printing process because you only have to choose the package to print, not all of the individual forms. MR9 comes with default packages you can edit or use as is. You can also create additional packages. Create as many packages as you need. Each package can include an unlimited number of forms selected from any category.

1. **Setup > Form Packages**
2. In the Form Packages window, to:
   - **Create a new form from scratch**
     See Creating form packages from scratch.
   - **Create a new package from an existing package**
     See Creating form packages from existing packages.

Reference

- Form Templates

Step-by-step instructions

- Creating form packages from scratch
- Creating form packages from existing packages
- Editing form packages

Creating form packages from scratch

If the default form packages in MR9 don't cover your needs, you can edit them or create new ones to match your business.

Continued from Creating form packages.

1. To create a new form from scratch click **New** in the Form Packages window's header.
2. In the New Form Package window, enter information and make selections:
   - ***Package Name**

     Required. Enter a descriptive name that will make it easy for staff to select the right form package later.
   - **Send To**

     The category of entity the forms in the package are for:
     - **Locations** – Default. For custodians of records or people who are named in subpoenas.
     - **Scheduling Party** – For clients who order records or subpoena services.
     - **Selected Parties** – For attorneys of record.
   - ***Package PDF File Name**

     Required. Copy the **Package Name** or enter a descriptive name for the compiled file of the forms in the package. This is the client-facing name of the package.
   - **Remarks**

     Additional information about the package for your staff, such as what the package is to be used for if the **Package Name** isn't descriptive enough.
3. Click **Save.** MR9 saves the package information and adds a **Forms** pane to the window.
4. To add forms to the package, see Adding forms to form packages.
5. In the Edit Form window, click **Save >**
   - **Save & Edit:** To save your work and continue modifying the package.
   - **Save & Close:** When you are finished modifying the package.

TIP: Add forms in any order, re-arrange them later

When you have added forms to the package, use and in the **Forms** pane to put the different form types in the order you want them to appear in in packages. If you want

to remove a form from the package, check its box in the **Forms** pane, then click .
To create a new package from an existing package, see Creating form packages from existing packages

Reference

- Form Templates

Step-by-step instructions

- Creating form packages
- Adding forms to form packages
- Creating form packages from existing packages
- Editing form packages

Creating form packages from existing packages

If you want to add your own form packages to MR9, you don't have to start from scratch. You can create new packages from existing packages, then change the copy to meet your needs.

Continued from Creating form packages.

1. In the Form Packages window, click the package's:
   - **> View** or hyperlinked **Package Name.** Then in the View Package window, click **Edit.**
   - **> Edit**
2. In the Edit Form Package window, click **Copy & New.**
3. MR9 opens a new Edit Form Package, copies the original package's information, and adds "Copy of" to the ***Package Name.**
4. In the Edit Form Package window, update information and make selections:
   - ***Package Name**

     Required. Internal name that should make it easy to select the right form package later.
   - **Send To**

     The category of entity the forms in the package are for:
     - **Locations** – Default. For custodians of records or people who are named in subpoenas.
     - **Scheduling Party** – For clients who order records or subpoena services.
     - **Selected Parties** – For attorneys of record.
   - ***Package PDF File Name**

     Required. Descriptive name for the compiled file of the forms in the package. This is the client-facing name of the package.
   - **Remarks**

     Additional information about the package for your staff, such as what the package is to be used for if the **Package Name** isn't descriptive enough.
5. To add forms to the package, see Adding forms to form packages.

6. To edit a form in the list, check the box in the **Forms** pane for the form then click . In the popuo that appears click **Yes.**
7. In the Edit Form window, click **Save >**
    - **Save & Edit:** To save your work and continue modifying the package.
    - **Save & Close:** When you are finished modifying the package.

TIP: Add forms in any order, re-arrange them later

When you have added forms to the package, use and in the **Forms** pane to put the different form types in the order you want them to appear in in packages. If you want to remove a form from the package, check its box in the **Forms** pane, then click .

Reference

- Form Templates

Step-by-step instructions

- Creating form packages
- Creating form packages from scratch
- Editing form packages
- Adding forms to form packages

Editing form packages

You can edit or delete any of the preset groups of forms in MR9.

1. **Setup > Form Packages**
2. In the **Search By** pane, click to see all of the form packages in MR9. Or:
   - **To search for a particular form,** enter all or part of a form package name in **Package Name**.
   - **To search for a form by category,** click ALL in the **Form Type** dropdown, then select a category.

   Before clicking .
3. In the resulting list of form packages, to:
   - **View a package's details** – Click its **> View** in the results. Or click its hyperlinked **Package Name.**
   - **Edit a package** – Click its **> Edit** in the results. Or click **Edit** in its View Form Package window.
   - **Delete a package** – Click its **> Delete** in the results. Or click **Delete** in its View Form Package/Edit Form Package window. Then click **Yes** in the popup that appears.
4. In the Edit Form Package window,
5.

Reference

- Form Templates

Step-by-step instructions

- Creating form packages

Adding forms to form packages

Add as many forms to your form packages as you need.

Continued from Creating form packages from scratch, Creating form packages from existing packages, or Editing form packages

1. In the Edit Form Package window, click in the **Forms** pane.
2. In the **New Form** panel, find a form you want to include in the package:
   - **Form Type**

     Select the category of the form you want to add in the dropdown.
   - **Form Group**

     Works with **Form Type.** If the forms in the category have been further organized into groups, select the form's group in the dropdown.
   - ***Form**

     Select the specific form you want in the dropdown.
3. Customize your selection:
   - ***Number of Copies**

     Default number is 1. If you want to include more copies of the form in the package, update the number in the field.
   - ***Bookmark Name**

     When the form package is compiled into a PDF, the text entered here will appear in the PDF's bookmark menu as the clickable link to the actual form.
4. In the **New Form** panel, click **Save >**
   - **Save & New:** To add the form to the **Forms** pane and continue adding forms to the package.
   - **Save & Close:** When you are finished adding forms.

Reference

- Form Templates

Step-by-step instructions

- Creating form packages from scratch
- Creating form packages from existing packages
- Editing form packages

Customizing communications

Depending on the function you are sending communications from, you can customize the templates for its emails, then select which template is the default.

1. Choose a function

1. **Setup > System Preferences** or **Connect > Connect Preferences**
2. In the preferences list, select the function you want to customize.
3. The preferences panel includes a list of email templates. You can click any hyperlinked **Template Name** in the function's preferences panel to view the template.
4. To add or update templates, click **Edit.**

2. Set email preferences

1. If the function has a **Form Sending Method** option, select how you want form information included in emails from the drop-down:
   - **Attach as PDF** – Form will be converted to a .pdf file and sent as an attachment.
   - **Embed as email body** – Form will be added to the email message with its formatting intact.
   - **Embed as email body and attach as PDF** – Form will be included both ways in emails.
2. In the **Email/Email Settings** pane, the default email template and any other templates you previously created are listed. To:
   - **Create a new template** – Click . In the **New Email Template** panel, all fields are required. Enter a name in ***Template Name.** To enter a subject line and email message including data fields and message formatting, see Customizing emails, messages, web pages & stamps.
   - **Update an existing template** – Click its hyperlinked **Template Name** in the function's preferences panel. In the **Edit Email Template** panel, change the ***Template Name** if desired. To edit the template's ***Email Subject** line or ***Email Message,** see Customizing emails, messages, & web pages.
   - **Delete a template** – Click its hyperlinked **Template Name.** In the **Edit Email Template** panel, click **Delete.** In the popup that appears, click **Yes.** You cannot

delete the default template. You must first select a different default, then the previous default can be deleted.

- **Select a different default** – Click the hyperlinked **Template Name** of the template you want to be the default. In the **Edit Email Template** panel, slide **Default** to Yes.

3. **Save preferences**

   Click **Save.**

NOTE: Customize attached/included forms also

Some MR9 emails include forms that contain related information. You can customize the content of these forms, even add new forms, in Form Templates.

Reference

- Worksheet preferences
- Invoice preferences
- Statement preferences
- Connect Invitation Letter preferences
- Repository preferences
- Form Templates

Step-by-step instructions

- Customizing emails, messages & web pages
- Creating/updating forms & letters

Customizing emails, messages & web pages

Customize the appearance of the body and signature of emails and MR Connect web pages with text formatting, images, hyperlinks, and tables.

You can also edit default text, add personalized text, and insert relevant MR9 data with contextual data fields in emails and MR Connect pages.

You can override these defaults in any emails sent from MR9.

Continued from Customizing communications, Email preferences, Setting personal preferences, Entering additional part information, Adding status notes to multiple parts simultaneously,Resolving support issues, Reporting issues, Following up on issues, Replying to support ticket reponses, Closing tickets, Re-opening tickets, Suggesting ideas, Commenting on and voting for ideas, or Sending messages.

- ## Customize subject lines

1. Click in an ***Email Subject** field to enter or edit text.
2. To insert data fields in templates, click your cursor in the field where you want to insert a data field, then click [▪] **> [category] > [data field].** The data fields available are contextual, meaning that only data fields relevant to the email's purpose are listed.

   Data fields are not available in Forgot Password Email subject lines.

- ## Customize text appearance

  In the***Email Message/*Message** pane, **Signature** pane, the **Login Page Description for Contact** pane of the Connect Preferences' **Branding – Connect** panel, the **Portal Page Description** pane of the Connect Preferences' **Branding – Portal** panel, or the Connect Preferences' **Contact–Announcements** panel, you can either:

  - Set these options then enter text.
  - Select text to be customized then select options.

- ### Text options

  - **B Bold**

    Toggle the selected text's weight between the default and bold.

  - ***I* Italic**

    Toggle the selected text's style between the default and italic/oblique.

  - **U Underline**

    Underline selected text, including word spaces, with a single line.

- **Align Text Left**

  Have selected text line up on left margin only.

- **Center Text**

  Have selected text align to a midpoint.

- **Align Text Right**

  Have selected text line up on right margin only.

- **Justify Text**

  Have selected text line up on both left and right margins.

- **Insert Unordered List**

  Mark each paragraph of selected text with a bullet.

- **Insert Ordered List**

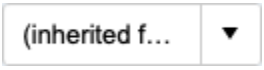
  Number each paragraph of selected text.

- **Indent**

  Move the selected text in from the margin in increments.

- **Outdent**

  Move the selected text out to the margin in increments. (Will not extend past the margin.)

- 

Select Font Family

  Scroll up or down the list of fonts and typefaces to select a different font for the selected text.

-

Select Font Size

  Scroll up or down the list of default font sizes to select a different size for the selected text.

-

Color

  Select a color in the default palette as the color for the selected text.

-
Background Color

  Select background color in the dropdown for the text area of selected text.

TIP: Insert cursor to change entire section

Instead of highlighting a word or paragraph, depending on what customization is selected, you can simply click to insert the cursor inside the word/paragraph, then apply the customization to the whole word/paragraph at once. For example click within a word, then click **B** and the entire word will be bolded. Click within a paragraph, then click and the entire paragraph will be indented.

- **Insert content**

  In ***Email Message** pane, the **Login Page Description for Contact** pane, or the **Signature** field, insert the cursor where you want to add content, then enter text or click:

  - **Insert Hyperlink**

    Not in Invoice Messages

    In the **Insert Hyperlink** popup that appears:

    1. **Web address** – *Required.* Enter the URL address you want to link.
    2. **Text** – The URL will appear in the email as a hyperlink unless you enter text you want to be the hyperlink instead.
    3. **ToolTip** – Enter text you want to appear as a hint when the cursor is over the hyperlink.
    4. **Open link in new window** – Check this box to have the URL appear in a new browser window when clicked.
    5. Click **Insert.**

    - **To edit the hyperlink,** insert the cursor, then click .
    - **To remove the hyperlink,** insert the cursor, then click . The text will remain but will no longer link to a URL.

  - **Create a Table**

    In the **Create a Table** popup, either:

    - Drag across and down through the boxes to select the number of rows and columns for your table. MR9 will create a 100%-width table with the selected parameters.
    - Click **Table Wizard** to enter table parameters in the **Table Wizard** popup.

  - **Insert Image**

    1. In the **Insert Image** popup, any previously uploaded images appear. Click:
       - An image to select it.
       - **Upload Image** to add an image file (.png, .jpg, or .jpeg) from your device. Then click the new image to select it.
    2. Click **Insert.**

  - **Insert Data Field >**

    Not in Email Signature, Notifications and Messages, Report Issues, or Suggest Ideas

[category] > [data field]. Select an MR9 data field to add to the email message where the cursor is. The data fields available are contextual, meaning that only data fields relevant to the email's purpose are listed.

- ## Code message in HTML

  Not in Notifications and Messages or Report Issues

  1. If you prefer to create or correct your messages in HTML, click </>.
  2. Input, style, and update message contents using HTML code in the **View HTML** popup. See Working with HTML.
  3. Click **Update** when finished.

TIP: Resize panes to see more/less

Any of these panes that allow you to style text can be stretched vertically while you are working in them so you can see more of your content at once instead of having to scroll to see parts that are hidden from view. You can also shrink them if desired to have more of the other panes in the same window visible or placed higher on your screen. Click and hold in the lower right corner of the pane you want to change, then drag up or down to change the size of the pane. MR9 does not save your adjustments after closing the window.

NOTE: Email formatting vs. template formatting

If an email includes an MR9 form, such as invoices and worksheets, that form can be customized too with formatting, logos, data fields, etc. Formatting forms is done in Form Templates. See Creating/updating forms & letters.

Reference

- MR Connect
- Forgot Password Email preferences
- Payment Receipts preferences
- Connect Forgot Password Email preferences
- Connect Branding preferences
- Account Activity preferences
- Support Tickets preferences
- Report Issues
- Suggest Ideas
- Notifications and Messages
- HTML
- Form Templates

Step-by-step instructions

- Setting up invoice messages
- Customizing communications
- Setting personal preferences
- Resolving support issues
- Reporting issues
- Following up on issues
- Replying to support ticket reponses
- Closing tickets
- Re-opening tickets
- Suggesting ideas
- Commenting on and voting for ideas
- Sending messages
- Customizing email preferences
- Working with HTML
- Creating/updating forms & letters
- Emailing from MR9

Testing email settings

Check that you have the correct settings for sending emails from within MR9.

Continued from Email preferences or Customizing email preferences.

1. Click **Test Email** in the **New Email/View Email/Edit Email** panel.
2. In the **Test Email** panel, set up a test email:
   - ***To**

     Required. Enter an email address that can receive the test email so you can check that it was sent.
   - ***Subject**

     Required. Enter a subject line that will be easy to spot so you can check that the email arrived successfully.
   - ***Message**

     Required. Enter some text for the body of the test email.
3. Click **Send.**
4. If MR9 sends the message, it will pop up a message that the message was sent successfully. Click **OK.** If you do not receive the email or get any error messages, check the email settings and try again.
5. Check your mailbox for the email, and view it to see if you want to make any changes to your signature.

NOTE: Verify your new Microsoft 365 email account first

If you select Microsoft Graph API - Microsoft 365 or the GoDaddy version, MR9 does not store your email's password in the database. Instead, you must verify your account before you can test or use it. After entering your account details in the New Email panel, click **Verify Account.** Another tab will open in your browser with your email address in it. (If required, enter your email password and click **Sign In.)** Click **Yes** to allow Oauth-MR9 access to your info. After verifying your account, the tab will close and **Verify Account** will be grayed out. You can now test and save your settings.

Reference

- User Preferences
- Email preferences

Step-by-step instructions

- Customizing global preferences
- Customizing communications
- Customizing email preferences

HTML

Hypertext Markup Language (HTML) is the predominant markup language for web pages. HTML is written in the form of tags, surrounded by angle brackets (<>). When a web browser "sees" a web page, it uses these tags to interpret how the document should look and what is to happen when certain things are clicked on.

Step-by-step instructions

- Working with HTML
- Customizing emails, messages & web pages

Working with HTML

A web page is simply a text document that contains instructions for web browsers. If you look at a typical web page in a regular text editor, you see a bunch of code in angle brackets and a bunch of text; it's not very exciting. However, when a web browser "sees" a web page, it uses these bits of code, called tags, to interpret how the document should look and what is to happen when certain things are clicked on.

It is beyond the scope of this guide to cover HTML in its entirety. Here are minimal basics if you want to format content in MR9 using HTML.

- **General Rule**
  HTML tags consist of a left angle bracket (<), followed by name of the tag and closed by a right angular bracket (>). Tags are usually paired. The ending tag looks just like the starting tag except a slash (/) precedes the text within the brackets.

- **Character Formatting**
  - <h1> **Headline style 1** </h1>
  - <h2> **Headline style 2** </h2>
  - <h3> **Headline style 3** </h3>
  - <h4> **Headline style 4** </h4>
  - Basic paragraph style
  - *Italic text*

- **Forced Line Breaks**
  The <br /> tag forces a line break with no extra space between lines. It is placed where you want the line break to occur and is unique in that it has no corresponding closing tag.

- **Linking to Other Documents**
  The chief power of HTML comes from its ability to link regions of text (and also images) to another document. The browser highlights these regions (usually with color and/or underlines) to indicate that they are hypertext links (often shortened to hyperlinks or simply links). HTML's hypertext-related beginning tag is <a>, which stands for anchor. To include an anchor in your document:

  1. Start the anchor with <a.
  2. Specify the document that's being pointed to by entering the parameter href=" [filename]" followed by a closing right angle bracket >.

3. Enter the text that will serve as the hypertext link in the current document.
4. Enter the ending anchor tag: .

Reference

- HTML

Step-by-step instructions

- Customizing emails, messages & web pages

General preferences

System-wide basic preferences and defaults.

- **Email**

  Options and content for general emails to clients, locations, and other users.

- **Forgot Password Email**

  Options for emails sent to MR9 users when they request a new password.

- **License Info**

  Information about your version of MR9, invoices, and credit card, plus options for your system.

- **Login**

  Options for user log-ins to MR9 follow general security rules for business applications. (Login preferences are slightly different for MR Connect. See Connect Login preferences.)

- **Notifications and Messages**

  Preferences for your company's message center.

- **Session Timeout**

  Length of time of no activity before MR9 automatically logs off.

- **System Time**

  Defaults for your MR9 order clock.

Reference

- Log in
- Connect Login preferences
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences

Email preferences

Options and content for general emails to clients, locations and other users.

Continued from Customizing global preferences.

In the **General – Email** panel, any email addresses already entered are listed in the **Email** pane. To:

- **View the settings for a listed email**

  Click the email's **> View** or its hyperlinked **Sender's Email.**

- **Update the settings for a listed email**

  Click the email's **> Edit.** Or click **Edit** in the **View Email** panel. See Customizing email preferences.

- **Test the settings for a listed email**

  Click the email's **> View/Edit** or its hyperlinked **Sender's Email.** Then click **Test Email** in the **View Email/Edit Email** panel. See Testing email settings.

- **Delete a listed email**

  Click the email's **> Delete.** Or click **Delete** in the **View Email** panel. Click **Yes** in the popup window that appears.

- **Add an email address**

  Click **New.** See Customizing email preferences.

NOTE: Personal email settings can be different

If you require different settings for your email than what the rest of the office is using, you can customize your MR9 emails preferences in User Preferences.

Reference

- User Preferences

Step-by-step instructions

- Customizing global preferences
- Testing email settings
- Customizing email preferences

Forgot Password Email preferences

Email instructions sent to MR9 users for resetting their forgotten passwords.

Continued from Customizing global preferences.

To customize ***Email Subject** and ***Email Message** *(both required)* for emails sent to MR9 users when they request a new password, see Customizing emails, messages, & web pages.

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages, & web pages
- Setting your password at log-in
- Resetting passwords

License Info preferences

Find information about your version of MR9. Change the number of named user licenses in your MR9, request system upgrades/downgrades, view billing history, pay invoices, and update the credit card that makes your monthly payments for MR9.

- **Product Code**

  Your MR9 product code

- **Total Licenses**

  Your current number of Named User Licenses. To increase or decrease the number of user licenses, see Adding or subtracting user licenses.

- **Expiration Date**

  Date your MR9 licenses will expire if not renewed

- **Edition**

  Edition of MetaRecords 9 software you are using.

- **Licensed URL**

  Web address of your MR9

- **Licensed To**

  Entity your MR9 is licensed to

- **Repository Usage (GB)**

  Amount in gigabytes of storage you are currently using for your MR9 repository

- **Repository Files**

  Number of files in your MR9 repository

- **Plug Ins**

  Any plug-ins you currently subscribe to are checked in the **Active** column of this pane

- **Custom Functions**

  Any MR9 custom programming you have is listed in this pane

- **Billing**

  To view billing history, pay invoices, and manage the credit card used to pay for your MR9 subscription, see Paying for MR9.

Reference

- Named User Licenses

Step-by-step instructions

- Customizing global preferences
- Adding or subtracting user licenses
- Paying for MR9

Named User License

MR9 users sign in through their browser using their own user ID and password. Each user must have their own **Named User License** to have their own unique user ID and password.

Adding or subtracting user licenses

As your staff changes, add or subtract Named User Licenses to ensure everyone can access your MR9 securely.

Continued from License Info preferences.

1. In the **General – License Info** panel, click **Total Licenses > Change Licenses.**
2. In the **Change Licenses** panel, click the ▲▼ to increase/decrease the number of Named User Licenses.
3. Click **Next.**
   - **If you decreased the number of licenses:** MR9 will display a message stating the pro-rated amount calculated from the next day to the end of the month that will be automatically applied towards the next invoice. Click **Confirm.**
   - **If you increased the number of licenses:** MR9 will display a message in the **Pay Invoice** panel stating the pro-rated amount for the current month that will be charged to the credit card on file.

     The credit card that is currently used appears in the **Payment Method** pane. To use this card, click **Pay.**

     If you want to update the credit card or change it, click the hyperlinked **Card No.** See Updating credit cards.

Reference

- Named User Licenses
- License Info preferences

Step-by-step instructions

- Customizing global preferences
- Updating credit cards

Updating credit cards

If you want to change the credit card used for your MR9 account, your card has expired, or you want to update its billing information, update the card in System Preferences.

Continued from Paying for MR9 or Adding or subtracting user licenses.

1. In the **Payment Method** panel, your existing card information is listed. You can update any information here except the **Card Number** and **CVV.** If you want to change the credit card used, click **New Card** and fill in all fields.
2. In the **Credit Card Information** pane, enter:
   - ***Card Type**

     Select the credit card network that issued the card (AMEX/MC/VISA)
   - ***Card Number**

     New card only

     Enter the card's 15 or 16 digit number.
   - ***Expiration Date (MM/YY)**

     Enter the date printed on the card.
   - ***CVV**

     New card only

     Enter the 3 or 4 digit card security code.
3. In the **Billing Information** pane, enter:
   - ***First Name**

     Given name of the person the card is issued to.
   - ***Last Name**

     Family name of the person the card is issued to.
   - ***Address**

     Street address or post office box for the billing address.
   - ***City**

     Billing address city.
   - ***State**

     Billing address state.

***Zip Code**

Billing address postal code.

4. Click **Save.**

Step-by-step instructions

- Customizing global preferences
- Paying for MR9
- Adding or subtracting user licenses

Paying for MR9

View your billing history, pay invoices, and update or change the credit card that automatically pays your MR9 invoices.

Continued from License Info preferences.

1. In the **General – License Info** panel, click **Billing.**
2. In the **Billing** panel, to:
   - **View payment history:** Default is current year's invoices. To view invoices for a previous year, click **Year** ▾ and select the desired year in the dropdown. Invoices with outstanding amounts are displayed in red. Click a hyperlinked **Invoice No.** to see details.
   - **Make a payment:** Click the hyperlinked **Invoice No.** of the invoice you want to pay. See Paying invoices.
   - **Manage the credit card paying for your account:** Click **Payment Method.** The credit card currently used for your MR9 account appears in the **Payment Method** panel. To update the credit card's billing information or change to a different card, see Updating credit cards.
3. Click **Close.**

Reference

- License Info preferences

Step-by-step instructions

- Customizing global preferences
- Paying invoices
- Updating credit cards

Paying invoices

Pay your MR9 invoices within MR9.

Continued from Logging into MR9 or Paying for MR9.

1. In the **View Invoice** panel, the details of the invoice to be paid appear. If this is the correct invoice, click **Pay Invoice.**
2. In the **Pay Invoice** panel, your credit card that is on file to pay MR9 invoices appears in the **Payment Method** pane. If you want to update or change the credit card, see Updating credit cards.
3. Click **Pay.** MR9 will credit your account, record the date paid, and send you an email acknowledging the payment. You can view the invoice and payment details at any time in **System Preferences > General – License Info > Billing.** See Paying for MR9.

Step-by-step instructions

- Customizing global preferences
- Logging into MR9
- Paying for MR9
- Updating credit cards

Login preferences

Options for user log-ins to MR9 follow general security rules for business applications. (Login preferences are slightly different for MR Connect. See Connect Login preferences.)

Continued from Customizing global preferences.

- **Account will be locked out, after this number of tries**

  Protect user accounts from hacking attempts by selecting a number in the dropdown to allow a set amount of incorrect login attempts before MR9 locks out the user.

  You can unlock an account in the account's User window. See Unlocking user accounts.

  NOTE: Security requires lock-out

  MR9 system preferences offer a Never Locked Out option. Unless you are using MR9 as a single user, we do not recommend this option as it is against general security rules for business applications to allow unlimited log-in attempts.

- **Password must meet complexity requirements**

  Slide to Yes to require strong passwords.

- **Enforce reset password periodically**

  Slide to Yes, then select a number of days in the **Duration (days) for reset password** to require MR9 users to change their password when the set amount of days has passed.

- **Allow same password as current**

  If you require users to change their password periodically, slide to Yes to allow them to keep using the same password when they update their password.

- **Use Email as Login Name**

  Slide to Yes to have MR9 set users' login names to their email address. If it is set to No, users can change their login names.

  OMTI does not allow for duplicate login names. If you select No and MR9 pops up a warning that there are duplicate names, click **OK** and in the **Duplicate User** panel, click ⋮ **> Change Login.** Enter a new user name and save.

- **Allow Social Login**

  Works with **Use Email as Login Name** set to Yes. Click to select Yes to allow users to sign into MR9 using their *Facebook, Google+, LinkedIn,* or *Microsoft* account.

- **Use Two-Factor Authentication**

  Slide to Yes to require users to verify their identity upon MR9 sign-in with a second factor in addition to their user name and password. (You can also set up two-factor authentication (2FA) for MR Connect users. See Connect Login preferences.)

  In MR9 & MR Connect, a verification code will be sent via the user's preferred method of communication, which they must then enter into MR9/MR Connect before accessing the site. Authentication is per device, and users can decide to authenticate a device once or every time they sign in on that device. See Verifying your device.

Reference

- Connect Login preferences
- User Preferences
- System Preferences > Orders
- Strong password
- Two-factor authentication (2FA)

Step-by-step instructions

- Customizing global preferences
- Customizing communications
- Unlocking user accounts
- Resetting passwords
- Verifying your device

Notifications and Messages preferences

Set preferences for your company's message center.

Continued from Customizing global preferences.

Delete notifications and messages in Sent Message and Trash after this many days

Select a number in the dropdown for how long MR9 will keep this information in the system.

Reference

- Notifications and Messages

Step-by-step instructions

- Communicating within MR9
- Customizing global preferences

Session Timeout preferences

Session timeout occurs when a user does not perform any action in MR9 for the length of the set interval. You can set the interval at any 5-minute increment from 5 minutes to 60 minutes.

Continued from Customizing global preferences.

Session Timeout Interval (minutes)

Default is 20 minutes. Select a different interval in the dropdown and click **Save.** The next time you or someone else logs into the system, the new timeout interval will apply to them.

NOTE: Set an interval that balances security with your work processes

OWASP (Open Web Application Security Project) recommends 2-5 minutes for idle time outs and 15-30 minutes for low-risk applications. NIST (US National Institute of Standards and Technology) recommends reauthentication session termination after 30 minutes of inactivity.

Reference

- User Preferences

Step-by-step instructions

- Customizing global preferences

System Time preferences

Set defaults for your MR9 order clock.

Continued from Customizing global preferences.

- **Time Zone**

  Select your company's time zone in the dropdown. Users can select a different time zone for orders in User Preferences.

- **Automatically adjust for Daylight Savings Time**

  Slide to Yes if you want MR9's order clock to change with daylight savings time.

Reference

- User Preferences

Step-by-step instructions

- Customizing global preferences

Assemble Court preferences

Content and layout for documents for federal, state, and local cases. Include merge fields for changing information like district, state, division, and court name.

Continued from Customizing global preferences.

Assemble Court

Edit the default contents of any line in the **Federal Court, State Court,** or **Other** pane.

To include a merge field, enter the field name from the **Available Merge Fields** listed in the line where you want the merge data to appear.

Enclose the merge field with:

- **<< >>** – To have the merge data appear in all caps on documents.
- **{{ }}** – To have the merge data appear as entered on documents.

TIP: Use merge fields for court names

Use the COURT1 merge field for data you want to appear before the word "COURT" and the COURT2 merge field for data you want to appear after "COURT.". For example, if you have these merge fields and the court's name is "ABC COURT SE," COURT1 will contain "ABC" and COURT2 will contain "SE."

Reference

- Orders
- Lookup panel

Step-by-step instructions

- Customizing global preferences

Holidays preferences

Days excluded from the business days included in calculating due dates for orders.

Continued from Customizing global preferences.

Holiday

To exclude a holiday from the business days included in calculating due dates for orders, check the holiday's **Active** box. See Lookup panel.

Reference

- Orders
- Lookup panel

Step-by-step instructions

- Customizing global preferences

New Order preferences

Defaults for new order settings.

Continued from Customizing global preferences.

- **Next Order No.**

  Click ⋮ **> Reset Next Order No.** In the **Reset Next Order No.** panel, enter a new starting number for future orders in ***New Next Order No.** *(required).* Then click **Save.**

Reference

- Order
- Orders
- Lists > Orders

Step-by-step instructions

- Customizing global preferences
- Starting orders

Order Status Color preferences

Color coding for each order status. You can set different colors for how each order status appears in the default MR9 Interface or Dark Mode (reverse/light on dark color scheme). Order listings in Orders, Turn In, and Billing results grids appear in the color that corresponds to their order status.

Continued from Customizing global preferences.

Order Status

To change the default or dark mode color coding for different order statuses, see Picking colors in MR9.

Reference

- Order
- Orders
- Daily Orders Audit
- Orders in Progress
- Turn In
- Post Invoices

Step-by-step instructions

- Customizing global preferences
- Picking colors in MR9

Part Status Color preferences

Color coding for each part status. You can set different colors for how each part status appears in the default MR9 Interface or Dark Mode (reverse/light on dark color scheme). Part listings in Orders, Turn In, and Billing results grids appear in the color that corresponds to their order status.

Continued from Customizing global preferences.

Part Status

To change the default or dark mode color coding for different part statuses, see Picking colors in MR9.

Reference

- Orders
- Daily Orders Audit
- Orders in Progress
- Turn In
- Post Invoices

Step-by-step instructions

- Customizing global preferences
- Picking colors in MR9

Tracking Step Automation preferences

Tracking steps can update the related part's status automatically when a step is completed.

Continued from Customizing global preferences.

Tracking Item

Choose which category of items that you track, such as records or process serving, that you want to set preferences for in the dropdown. (Tracking Item categories are set in Lists > Tracking.)

Part Status to be

Works with **Tracking Item.** To set or change the part statuses that different events trigger, click the **Part Status to be** for a **Tracking Step** and select the status that a part will update to when the event occurs in the dropdown. (Part Statuses and default are set in Lists > Parts. Tracking Steps are set up in Tracking Steps. See Defining tracking steps.)

Reference

- Orders
- Tracking
- Lists > Tracking
- Lists > Parts
- Tracking Steps

Step-by-step instructions

- Customizing global preferences
- Defining tracking steps

Worksheet preferences

Options and content for emails that accompany worksheets sent to runners (field agents).

Continued from Customizing global preferences.

To customize worksheet email templates, and choose the default template for emails sent with worksheets, see Customizing communications.

Reference

- Orders
- Notify Runners

Step-by-step instructions

- Customizing global preferences
- Notifying runners
- Customizing communications

Envelopes preferences

Set defaults for printing envelopes from MR9's Envelopes and Labels function.

Continued from Customizing global preferences.

1. In the **Envelopes** panel, default settings for printing envelopes appear. To change the default envelope size, in the **Envelope Size** dropdown, either:
   - **Select a different standard envelope size** in the dropdown.
   - **Choose Custom** in the dropdown, then enter the envelope's dimensions in the **Width** and **Height** fields.
2. To customize where addresses print on envelopes, change the values, set in inches, in the **Top (inch)** and **Left (inch)** fields under **Printing Position.**
3. Choose a typeface and size for how addresses will appear visually in the **Font Name** and **Font Size** dropdowns.

Reference

- Production
- Envelopes and Labels

Step-by-step instructions

- Customizing global preferences

FedEx Account for Shipping Labels preferences

Enter FedEx account information into MR9 to print labels and track shipments. You can have multiple FedEx accounts, then select which one you want to use when printing labels.

TIP: FedEx accounts can also mean label templates

If you have multiple shipping label setups that you use regularly, instead of updating the default each time you ship something that needs a different label setup, create accounts/templates for each setup instead. Accounts can share the same credentials, so you can have multiple templates with the same credentials but different shipping label specifications saved as accounts.

Continued from Customizing global preferences.

1. In the **Production – FedEx Accounts for Shipping Labels** panel, any FedEx accounts already entered are listed in the **Account Name** pane. To:
   - **View the settings for a listed account:** Click the account's **> View** or its hyperlinked **Account Name.**
   - **Update the settings for a listed account:** Click the account's **> Edit.** Or click **Edit** in the **View FedEx Account** panel.
   - **Delete a listed account:** Click the account's **> Delete.** Or click **Delete** in the **View FedEx Account** panel. Click **Yes** in the popup window that appears.
   - **Add an account:** Click **New.**
2. In the Edit FedEx Account/New FedEx Account panel, edit or enter a name for the FedEx account in ***Account Name** *(required).*
3. To find the information to enter in the fields in **Edit FedEx Account/New FedEx Account** panel, read How to get FedEx Key information for printing FedEx shipping labels.
4. Follow the instructions to get your company approved to print shipping labels from MR9, then enter the required information here (if you are making a new label template for an existing FedEx account, copy this information from the existing account):
   - **Authentication Method**

     Default is OAuth2 *(uneditable*).
   - ***Account No.**

     Required. Your FedEx account number.

- ***API Key**

  Required. Provided by FedEx.

- ***Secret Key**

  Required. Provided by FedEx.

- **Default**

  Slide to Yes to make this account the primary FedEx account for labels sent from MR9. You can override which account you use when printing an individual label.

5. Continue to follow the instructions in the KB article to set up your label in MR9. (If you are making a new label template for an existing FedEx account, skip this step.)
6. To set default values for your label template in this account, see Setting shipping label specifications.

Reference

- Production
- Shipping

Step-by-step instructions

- Customizing global preferences
- Shipping via FedEx and UPS
- How to get FedEx Key information for printing FedEx shipping labels
- Setting shipping label specifications

Repository Logging preferences

Preferences for publishing new uploads and logging all file download activities as required by general security rules for business applications.

Continued from Customizing global preferences.

- ## General

  ### Set Publish checked as a default on New Upload screen

  Slide to Yes to have Publish be the default when uploading files instead of having to check the **Publish** box each time.

- ## Logging

  Slide to Yes to begin logging and tracking file download activities. (See Tracking inhouse and online repository access.):

  - ### Logging download activity for internal usage

    Files downloaded by in-house staff.

  - ### Logging download activity for contacts

    Files downloaded by clients and third parties through MR Connect.

    #### TIP: Help contacts track their own usage

    When you select Yes to track download activity for contacts, your contacts can also see their download activity in MR Connect's Repository. A Reviewed column will be included in the Repository results grid, and any file they download will record the date and time in that column, so your clients can see at a glance if they have downloaded a file or not.

Reference

- Production
- Repository
- MR Connect

Step-by-step instructions

- Customizing global preferences
- Tracking inhouse and online repository access

UPS Account for Shipping Labels preferences

Enter UPS account information into MR9 to print labels and track shipments. You can have multiple UPS accounts, then select which one you want to use when printing labels.

TIP: UPS accounts can also mean label templates

If you have multiple shipping label setups that you use regularly, instead of updating the default each time you ship something that needs a different label setup, create accounts/templates for each setup instead. Accounts can share the same credentials, so you can have multiple templates with the same credentials but different shipping label specifications saved as accounts.

Continued from Customizing global preferences.

1. In the **Production – UPS Accounts for Shipping Labels** panel, any UPS accounts already entered are listed in the **Account Name** pane. To:
   - **View the settings for a listed account:** Click the account's **> View** or its hyperlinked **Account Name.**
   - **Update the settings for a listed account:** Click the account's **> Edit.** Or click **Edit** in the **View UPS Account** panel.
   - **Delete a listed account:** Click the account's **> Delete.** Or click **Delete** in the **View UPS Account** panel. Click **Yes** in the popup window that appears.
   - **Add an account:** Click **New.**
2. Edit or enter a name for the UPS account in ***Account Name** *(required).* This is the name the account will be identified by in MR9.
3. To find the information to enter in the fields in **Edit UPS Account/New UPS Account** panel, read How to get UPS Access Key for printing UPS shipping labels.
4. Follow the instructions to get your company approved to print shipping labels from MR9, then enter the required information here (if you are making a new label template for an existing UPS account, copy this information from the existing account):
   - **Authentication Method**

     Default is OAuth2 *(uneditable*).
   - ***Account No.**

     Required. Assigned by UPS.
   - ***Client ID**

     Required. Provided by UPS.

- ***Client Secret**

  Required. Provided by UPS.

- **Default**

  Slide to Yes to make this account the primary UPS account for labels sent from MR9. You can override which account you use when printing an individual label.

5. Continue to follow the instructions in the KB article to set up your label in MR9. (If you are making a new label template for an existing UPS account, skip this step.)
6. To set default values for your label template in this account, see Setting shipping label specifications.

Reference

- Production
- Shipping

Step-by-step instructions

- Customizing global preferences
- Shipping via FedEx and UPS
- How to get UPS Access Key for printing UPS shipping labels
- Setting shipping label specifications

Invoice preferences

Options and content for emails that accompany invoices.

Continued from Customizing global preferences.

- ## New Invoice

  ### Next Invoice No.

  Click ⋮ **> Reset Next Invoice No.** In the **Reset Next Invoice No.** panel, enter a new starting number for future invoices in ***New Next Invoice No.** *(required).* Then click **Save.**

- ## Print Options

  - ### Invoice Format

    Select the template that matches your company's payment options in the dropdown:

    - **Classic:** Classic is a standard statement with a remittance section at the bottom of the statement.
    - **Classic-No Remittance:** No remittance is the same as the Classic without a Remit To section at the bottom.
    - **Classic – Credit Card (AMEX/MC/VISA):** Adds a credit card payment section to the bottom right of the remittance section with options for American Express, MasterCard, and Visa.
    - **Classic – Credit Card (MC/VISA):**Adds a credit card payment section to the bottom right of the remittance section with options for MasterCard and Visa.

  - ### Stamp "PAST DUE" when balance is still due

    Slide to Yes to have this alert appear on unpaid invoices that are older than your payment terms. (Term options are set in Lists > Accounting and applied to firms.) See Entering additional firm information.

  - ### Print Bill To's phone number & fax number

    Slide to Yes to print the firm's main phone number and fax number (if they have one) below the address in the Invoice header section.

  - ### If Split used, show it in Service Name

    Slide to Yes to include "Split" in service item names on invoices for parties who opted to share the cost of a service item. See Selecting preferred or requested services and Adding & updating individual service items.

- **Email Settings**

  To customize email templates, and choose the default template for emails sent with invoices, see Customizing communications.

  TIP: Make paying invoices convenient

  When customizing emails to be sent with invoices, include the PayInvoiceLink data field in the Email Message pane (see Customizing emails, messages & web pages). Then if you have MR Connect, when your clients click the hyperlink MR9 generated in the email, it will take them to the invoice in MR Connect so they can easily view and pay the invoice online.

Reference

- Billing
- Lists > Accounting
- Send Invoices
- MR Connect

Step-by-step instructions

- Customizing global preferences
- Batch-posting invoices
- Entering additional firm information
- Selecting preferred or requested services
- Adding & updating individual service items
- Customizing communications
- Customizing emails, messages & web pages

LEDES 1998B preferences

Options for e-billing .

Continued from Customizing global preferences.

- ***Default file extension**

  Required. Default is TXT. Leave default unless your clients require a different file type.

- **Do not export zero amount Service Items**

  Slide to Yes to have electronic bills only include services that had billable charges.

Reference

- Electronic Billing
- Service Items
- Export Invoices

Step-by-step instructions

- Customizing global preferences

Reward Points preferences

Options for awarding points to contacts who order orders from your company.

Continued from Customizing global preferences.

- **Use Reward Points System**

  Default is No. Slide to Yes if you want to award points to contacts for placing orders.

- **Calculate points for original invoices only**

  Default is Yes. Slide to No if you want to award points for all orders.

- **Generate 1 point for every $ (whole dollars only)**

  Enter the default dollar amount billed on invoices that earns a point, e.g., every $100 billed earns 1 point.

- **Rounding Method**

  Choose how invoiced amounts will be generalized for determining reward points from the dropdown:

  - **Common**
    Amounts ending in units 1–4 are rounded down, amounts ending in units 5–9 are rounded up.
  - **Round Up**
    Amounts ending in units 1–9 are rounded up.
  - **Round Down**
    Amounts ending in units 1–9 are rounded down.

- **When redeemed, 1 point equals $**

  Enter the multiplier MR9 will use to convert points to dollars. Does not have to be whole dollar amounts and can be less than one dollar. Use decimals, up to 2 placements (hundredths), if needed.

NOTE: Indicate which clients earn points

Contacts don't earn points until you set up points in their MR9 listing. You designate who receives points for a contact's bookings with your company. See Managing contacts' award points.

Reference

- Billing
- Award Points

Step-by-step instructions

- Customizing global preferences
- Managing contacts’ award points
- Analyzing point activity
- Managing points
- Viewing point history

Payment Receipts preferences

Set default subject line for MR9 payment receipts.

Continued from Customizing global preferences.

To customize the subject line of payment receipt emails, see Customizing emails, messages & web pages.

Reference

- Receivables
- Send Payment Receipts

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages & web pages

Statement preferences

Set preferences and defaults for MR9 statements.

Continued from Customizing global preferences.

- ## Print Options

  - ### Statement Format
    Select the template that matches your company's payment options in the dropdown:
    - **Classic:** Classic is a standard statement with a remittance section at the bottom of the statement.
    - **Classic-No Remittance:** No remittance is the same as the Classic without a Remit To section at the bottom.
    - **Classic – Credit Card (AMEX/MC/VISA):** Adds a credit card payment section to the bottom right of the remittance section with options for American Express, MasterCard, and Visa.
    - **Classic – Credit Card (MC/VISA):**Adds a credit card payment section to the bottom right of the remittance section with options for MasterCard and Visa.
  - ### Print Bill To's phone number & fax number
    Slide to Yes to print the firm's main phone number and fax number (if they have one) below the address in the Statement header section.
  - ### Colors of Age
    Customize which colors are used to color code open-invoice listings on statements by invoice age. See Picking colors in MR9.

- ## Email Settings

  To customize statement email templates, and choose the default template for emails sent with statements, see Customizing communications.

Reference

- Receivables
- Send Statements

Step-by-step instructions

- Customizing global preferences
- Picking colors in MR9
- Customizing communications

Check preferences

Options to make MR9 information print properly on your preprinted checks.

Continued from Customizing global preferences.

- **Voucher Checks**

  Slide to Yes if you print 2-part checks, which include a voucher your client keeps after cashing the check as a record of the payment.

- **Additional Top Margin (inch)**

  Enter amount using inches to move information down on checks. Enter negative amounts to move information up on checks. Can be decimals, up to 2 placements (hundredths).

- **Additional Left Margin (inch)**

  Enter amounts to using inchesmove information right on checks. Enter negative amounts to move information left on checks. Can be decimals, up to 2 placements (hundredths).

Reference

- Payables
- Print Checks

Step-by-step instructions

- Customizing global preferences
- Printing custodian fee checks

Check Reconcilliation Data preferences

Set up MR9 to properly import bank statement data files, update your MR9 records, and produce reports.

Continued from Customizing global preferences.

- **Data Layout**

  MR9 can import data files formatted as plain fixed length ASCII.

  Update the defaults for where the different types of data appear in each row of the bank statement ASCII file. The preferences also specify 2 decimal places for check amounts as the default. All fields require a number.

  Changes will take effect the next time you or someone else logs into MR9.

Reference

- Payables
- Import Check Reconciliation Data

Step-by-step instructions

- Customizing global preferences
- Clearing payments automatically

Contacts preferences

Set up MR9 to automatically populate the Full Name field in Contact listings.

Continued from Customizing global preferences.

Autofill

- **Full Name**

1. Click and select the name data field (first name, middle name, last name, or salutation) you want to automatically appear in the first position in contacts' Full Name fields.
2. Repeat step 1 to add other name data fields in the order you want them to appear in contacts' Full Name fields. MR9 automatically adds a space between the name data fields.
3. You can also click your cursor in the text field between name data fields where you want to insert another name data field, then click and select the data field.

Reference

- Contacts

Step-by-step instructions

- Customizing global preferences
- Adding contacts to MR9

Firms preferences

Set system-wide defaults for Firms.

Continued from Customizing global preferences.

Default settings for new Firm

- **Late Charge Rate**

  Enter the amount as a percentage (e.g., "2.000") you charge as a one-time account service fee on past-due invoices.

- **Finance Charge Rate**

  Enter the amount as a percentage (e.g., "1.200") you charge monthly on past-due invoices. The finance charge is calculated once a month for all open invoices.

- **Sales Tax Rate**

  Enter the sales tax rate as a percentage (e.g., "7.000") for your state.

- **Invoice past due in days**

  Enter the number of business days past the payment terms of invoices for clients to render payment before MR9 notifies you to start collection efforts.

- **Always print details on invoices**

  Slide to Yes to have services listed on the firm's invoices as the default for new firm entries. You can turn it off on individual firms in the **Additional** pane of the firm's listing. See Entering additional firm information.

Reference

- Firms

Step-by-step instructions

- Customizing global preferences
- Entering additional firm information

Email Log preferences

Designate which types of MR9 emails you want to keep track of and how long you want to store them.

IMPORTANT: Attachments are saved along with emails

When MR9 saves emails in the Email Log, all attachment files are stored as well and add to your repository size. This could result in additional repository storage charges, so only store the email types you consider necessary to maintain a record of.

Continued from Customizing global preferences.

- ## General

  ### Purge email log after x days

  Select a number in the dropdown for how many days MR9 should keep an email in the log.

- ## Logging

  All email types are set to be logged into the Email Log as the default. Click the slider to No for any email type you do not need to save.

Reference

- Email Log

Step-by-step instructions

- Customizing global preferences

QuickBooks preferences

Set system-wide defaults for QuickBooks Integrator.

Continued from Customizing global preferences.

QuickBooks Edition

Select your version of *QuickBooks* in the dropdown:

- **QuickBooks Desktop**

  If you have *QuickBooks* installed locally on a server or other inhouse computer, enter the following information:

  - ***User** – *Required.* Enter your *QuickBooks* user ID.
  - ***Password** – *Required.* Enter your *QuickBooks* user password.
  - ***IP or URL** – *Required.* Enter the public IP address or URL of workstation/server where your *QuickBooks* application is installed.
  - ***Port** – *Required.* Port is a communication channel between MR9 Server and *QuickBooks.* We recommend using port 8166. This port must be opened from your router/firewall. To check that it is open, click **Check port is open.**

    IMPORTANT: Set up *QuickBooks Desktop* to work with MR9

    Before you can import MR9 data into *QuickBooks Desktop,* you must download a free remote connector application from *QuickBooks* and set it up to enable secure remote access to your *QuickBooks.* See Preparing to use *QuickBooks Desktop* with MR9.

- **QuickBooks Online**

  If you subscribe to the cloud-based version of *QuickBooks:*

  1. Set up an Intuit developer account. See Generating QuickBooks online credentials.
  2. Enter the following information:
     - ***Client ID** – *Required.* Enter your *QuickBooks* client ID.
     - ***Client Secret** – *Required.* Enter your *QuickBooks* client secret code.
  3. Click **Test connection to QuickBooks Online**, then sign into your Intuit account.
  4. If everything has been set up correctly, you will be automatically directed back to MR9. Click **OK** to close the popup.

Reference

- QuickBooks Integrator

Step-by-step instructions

- Customizing global preferences
- Generating QuickBooks online credentials
- Preparing to use *QuickBooks Desktop* with MR9

Generating QuickBooks online credentials

If you subscribe to *QuickBooks,* you must set up a developer account with Intuit, then add the credentials to your MR9 before you can use your version of *QuickBooks* with QuickBooks Integrator.

Continued from QuickBook preferences.

1. Connect to the Intuit Developer website (https://developer.intuit.com).
2. Click **Sign Up** in the top right corner of the screen.
3. Enter your email address, first & last name, phone number, and a password, then click **Create Account.**
4. Intuit will send a confirmation email to the address you entered. Click **Verify my email** in the email from Intuit.
5. When the email verification is complete, click **Continue.**
6. On the Intuit Developer **Welcome** screen, you can optionally answer the questions (and click **Done),** or refresh the screen to skip the questions.
7. Click **> Account Profile.**
8. Fill in all of the required fields in the **About You** screen. The **Company Name** field defaults to the **First Name** and **Last Name** entered when you set up the account. Enter your company name or group name to identify the user's group. When you change the information, the profile's title will change to reflect this.
9. Click **Save.**
10. Click **Apps** in the **My Apps Dashboard** screen, then click **+ Create an app.**
11. In the **Create app** screen, click **QuickBooks Online and Payments.**
12. In the **QuickBooks Online and Payments** screen:
    - Under **Give your app a name,** enter MR9 in the **What's your app name?** field.
    - Under **Select a scope,** check the **com.intuit.quickbooks.accounting** box.
13. Click **Create app.**
14. When the **Develop your app** screen appears, click **Production Settings** in the left side menu.
15. In the **Production** screen, your **App name** (MR9) and **App ID** appear under **App info.** (You do not need to upload an app logo.) Also:

1. Under **Terms of Service Links,** enter:
    - https://www.metarecords.com/terms.aspx in the **End User License Agreement Url** field.
    - https://www.metarecords.com/privacy.aspx in the **Privacy Policy Url** field.
2. Under **App URLs,** enter:
    - metarecords.com in the **Host Domain*** field.
    - https://*your_host_name*.metarecords.com in the **Launch URL*** field.
    - https://*your_host_name*.metarecords.com in the **Disconnect URL*** field.
3. Under **Categorize your app,** check the **Billing, Invoicing,** and **Payment** boxes.
4. Under **Where is your app hosted?,** click **Add country,** then:
    - select United States of America in the **Country*** dropdown.
    - enter 13.88.20.159 under **IP address*.**
    - check the **Single IP address** box.
5. Under **Target industries for this app,** check the **None of the above** box.
6. Under **Countries you accept connections from,** select all of the countries where you will use MR9 with QuickBooks Online from the dropdown.
7. Confirm that Accounting is selected under **Scope for the API,** then click **Save.**

16. In the main screen, click **Production Settings > Keys & credentials** in the left side menu.
17. If the **Add details about your app** screen appears, then you still have some production setup to finish. All completed items are marked ✓; incomplete items are marked •. Click any incomplete items to access the corresponding screen and update information to complete the item. When all items on the **Add details about your app** screen are marked ✓, continue to the next step.
18. Under **Complete the app assessment questionnaire,** click **Go to the app assessment questionnaire.**
19. On the **App assessment questionnaire** screen, click **Start questionnaire.**
20. MR9 should appear in the first field by default. If it does not, select MR9 in the dropdown.
21. in the **General Questions** dropdowns/lists, select the following answers:

1. **Has your company ever received any complaints, lawsuits, or investigative requests from regulatory authorities or government agencies?** No.
2. **Have you worked with legal counsel to understand any regulatory requirements or other considerations related to your business activities and use of user data?** Yes
3. **Have you reviewed and confirmed that you will comply with the security policies found here?** Yes, I confirm that my app will comply with the security policies found above.
4. **Have you reviewed and confirmed that you will comply with the Supplier Code of Conduct found here?** Yes, I confirm that my app will comply with the Supplier Code of Conduct found above.
5. **Apps that use Intuit APIs (whether public or private) need to be relevant and clearly related to QuickBooks, accounting, payments, workflows, finance, and other acceptable uses.**

   Is your app designed for either of the following:

   - **To enhance, streamline, or improve yours or others' QuickBooks experience**
   - **To facilitate a business process (e.g. syncing QBO data to another service)**

   Yes
6. **Are you or any of your representatives (including owners, affiliated parties, associated parties or any beneficiaries):**

   (i) on any sanctions lists in the countries available in the app store or

   (ii) doing business in any of the US embargoed countries (which includes the Crimea region of Ukraine, Donetsk People's Republic (DNR), Luhansk People's Republic (LNR) of Ukraine, North Korea, Iran, Cuba, and the Syrian Arab Republic)?

   No
7. **Does your application involve any generative AI functionality, including but not limited to ChatGPT, GPT-3 or 4, Google's BARD, conversational chatbots, etc.?** No

22. Click **Next Tab.**
23. Under **App Information,** select/enter the following answers:

    1. **Which of the following is true about your app (at least one option must be checked):** You used another platform or tool to build and code your app.

- **What's the name of the platform or tool?** CData
- **Provide a link to the platform or tool's website:** https://www.cdata.com/
- **Describe how your app interacts with the platform:** Our application uses ADO.NET Provider for QuickBooks of CData and manage QuickBooks Online.

2. **What platform(s) does your app utilize and make API calls from? (Select all that apply)** Web/Browser
3. **How does your app interact with Intuit product data? (Select all that apply)**
   - It reads data from Intuit product(s)
   - It writes data to Intuit product(s) (including Charge/ECheck transactions for payment processing)
4. **Are you building a private app for your team or business? Or, do you plan to make it publicly available?** We're building a private app
5. **Which types of QuickBooks Online users can use your app?** Any user of the QuickBooks Online company
6. **Does your app integrate with platforms other than Intuit?** No

24. Click **Next Tab.**
25. Under **Authorization and Authentication,** select the following answers:
    1. **Have you tested connecting, disconnecting, and reconnecting your app with a sandbox or non-production company?** Yes
    2. **How often does your app refresh access tokens?** Every time it makes an API call
    3. **Does your app retry authorization and authentication requests that have failed?** No
    4. **If your app encounters an authorization and authentication error, do you ask customers to reconnect to your app?** No
    5. **Did you use the Intuit discovery document to get the latest endpoints required in the OAuth2.0 flow?** Yes
    6. **Can your app handle the following scenarios (yes/no):**
       a. **Errors due to expired access tokens** Yes
       b. **Errors due to expired refresh tokens** Yes
       c. **Invalid grant errors** Yes

d. **CSRF errors** Yes

7. **Does your app rely on the OAuth playground or other offline tools to get access or refresh tokens?** No

26. Click **Next Tab.**

27. Under **API Usage,** select the following answers:

    1. **Which of the broad API categories does your app use? (multiple choice)** Accounting API

    2. **How often does your app call our APIs for each customer? (multiple choice)** Daily

28. Click **Next Tab.**

29. Under **Accounting API,** select the following answers:

    1. **Which customer-facing version of QuickBooks Online is your app designed for? (Select all that apply)** Simple Start, Essentials, Plus, and Advanced

    2. **Users often change versions of QuickBooks Online. This means they may get access to new features, or lose certain features, at any time. Can your app handle situations where users gain or lose access to version-specific features?** No

    3. **Does your app utilize any of the following features ? (Select all that you've verified and thoroughly tested)** Sales tax - For QuickBooks companies in the United States

    4. **Do you use webhooks for your app?** No

    5. **Do you use the CDC operation for your app?** No

30. Click **Next Tab.**

31. Under **Error Handling,** select the following answers:

    1. **Have you tested if your app can handle API errors, including syntax and validation errors?** Yes

    2. **Does your app capture the value of the intuit_tid field from response headers?** No

    3. **Does your app have a mechanism for storing all error information in logs that can be shared for troubleshooting purposes, if required?** No

    4. **Do you provide a way for customers to contact you for support from within your app?** Yes

- **How?** Online Chat solution is embedded.

32. Click **Next Tab.**
33. Under **Security,** select the following answers:
    1. **Has your company ever had a security breach that required notification to customers or government agencies/authorities?** No
    2. **Do you have a security team that regularly assesses vulnerabilities and risks for your app?** Yes
    3. **Are the client ID and client secret for your app stored securely (i.e. not hardcoded within your app or displayed in browser console logs)?** Yes
    4. **Does your app use multi-factor authentication?** Yes
    5. **Does your app use Captcha for authentication?** No
    6. **Does your app use WebSocket?** No
    7. **Once a customer's Intuit data is in your system, do you allow it to be used by or shown to anyone other than that customer?** No, all Intuit customer data processed by our app is only used for the benefit of the original customer.
34. Click **Submit.** If the **Confirmation** popup appears, click **Yes.**
35. If a **Thank You** popup appears, click **OK.**
36. Close the App assessment questionnaire browser tab, then select the Intuit Developer website browser tab.
37. In the main screen, click **Production Settings > App assessment questionnaire** in the left side menu.
38. Under **Submission status,** you can view the status of your submission. When completed, **Submission status** will appear as Completed.
39. In the main screen, click **Production Settings > Keys & credentials** in the left side menu.
40. In the **Keys & credentials** screen, copy and separately store the information in the **Client ID** and **Client Secret** fields under **Keys.** You will need this information to use QuickBooks Online from MR9. See QuickBooks preferences.

NOTE: You can update your Client Secret info

If you want to update your Client Secret code, click **Rotate Secret.** Your Client Secret code will change. Be sure to copy the new Client Secret code to update the information in MR9 as well so your QuickBooks Integrator will still work.

41. Under **Redirect URIs,** click **Add URI.**
42. Enter https://oauth.metarecords.com/requestquickbooksonlineauthorizationcode in the new input field.
43. Click **Save.**

Reference

- QuickBooks Integrator
- QuickBooks preferences

Step-by-step instructions

- Customizing global preferences
- Customizing communications
- Customizing email preferences

Following up on issues

After reporting an issue using a support ticket, track its resolution and continue the discussion with us online. When the issue has been resolved, close the ticket. Re-open closed tickets to resume the conversation.

1. **Help > Report Issues**
2. In the **Search By** pane, **Ticket Status** defaults to In Progress with any currently unresolved tickets listed. To search for other tickets, change the search criteria:
   - **Ticket Status**
     - **In Progress** – Default. Support issues that have not been resolved yet.
     - **Resolved** – Tickets you have determined are resolved and rated the performance, or that were otherwise closed.
   - **Problem/Issue**

     To find an issue by its topic, enter all or part of its header.
   - **Issued Date From/Issued Date To**

     Resolved Status only

     Default is from 3 months prior to today. Enter a date or date range to see tickets initiated within those dates. See Date Navigator.
3. Click . All of the support tickets that meet the specified search condition(s) appear.
4. To:
   - **View comments & reply to a ticket,** see Replying to support ticket responses.
   - **Close a ticket and rate our response,** see Closing tickets.
   - **Re-open a closed ticket to continue the discussion,** see Re-opening tickets.

Reference

- Date Navigator

Step-by-step instructions

- Reporting issues
- Replying to support ticket responses
- Closing tickets
- Re-opening tickets

Replying to support ticket responses

View and reply to OMTI's responses on submitted issues.

1. **Help > Report Issues**
2. To find a ticket, see Following up on issues.
3. Click the hyperlinked **Ticket No.** of a ticket you want to reply to.
4. In the View Ticket window, any responses to the **Problem/Issue** are listed in the **Threads** pane in chronological order.
5. To continue the conversation, click **Edit.** Then click **Add Comment.**
6. In the **Add Comment** panel, enter your reply in ***Comment** *(required)*. If you want to format your message, or add hyperlinks and images, see Customizing emails, messages & web pages.
7. Click **Save.** Your comment appears at the end of the **Threads** pane.
8. If you want to close the ticket, see Closing tickets.

Step-by-step instructions

- Following up on issues
- Customizing emails, messages & web pages
- Closing tickets

Closing tickets

When an issue has been resolved or you no longer need it to be an active inquiry, close its ticket. You can always re-open the ticket at a later date if you want to continue the conversation.

1. **Help > Report Issues**
2. In the **Search By** pane, **Ticket Status** defaults to In Progress with any currently unresolved tickets listed. If you need to restrict results, see Following up on issues.
3. Click the hyperlinked **Ticket No.** of a ticket you want to close.
4. In the View Issue window, click **Edit,** then click **Close Issue.**
5. In the **Close Issue** panel, click ***Ticket Status**
   - **Cancelled:** You no longer want to pursue this issue.
   - **Solved:** You have received the solution you needed.
6. In ***Reason** *(required),* enter your comments about why the issue is resolved. If you want to format your message, or add hyperlinks and images, see Customizing emails, messages & web pages.
7. Click **Save.**
8. The ticket's status changes and your comments are added to the ticket's **Threads** pane. To re-open the ticket, see Re-opening tickets.

Step-by-step instructions

- Re-opening tickets
- Following up on issues
- Customizing emails, messages & web pages

Re-opening tickets

You can re-open a closed ticket at any time if you want to restart the conversation.

1. **Help > Report Issues**
2. If you should want to re-open a ticket and continue the conversation thread, find the ticket in your Resolved issues (see Following up on issues) and click its hyperlinked **Ticket No.**
3. In the View Issue window, click **Reinstate.**
4. In the **Reinstate** panel, enter your comment/question in ***Comment** *(required).* If you want to format your message, or add hyperlinks and images, see Customizing emails, messages & web pages.
5. Click **Save.** The ticket is reinstated as an In Progress issue and your comment is added to its **Threads** pane.

Step-by-step instructions

- Closing tickets
- Following up on issues
- Customizing emails, messages & web pages

Suggesting ideas

When you have an idea for improving MR9, you can submit it directly to OMTI's development team from within MR9. This way you have a record of your suggestion and its development status — plus other MR9 users can comment and vote on your suggestion, increasing its chances of being implemented.

Before submitting a new idea, browse the existing ideas for the same function to see if someone else has already proposed the same idea. It's better to vote an existing idea up than propose it again because ideas with higher scores are more likely to be implemented.

1. **Help > Suggest Ideas**
2. In the Suggest Ideas window, click **New.**
3. In the New Idea window, all fields are required but to avoid duplicate suggestions, follow this order:
4. Click ***Module** ▾ to select the area of MR Connect or MR9 that your idea applies to.
5. After selecting the module, click ***Function** ▾ to select the specific MR9 function that your idea applies to. If you want to suggest adding a function instead of improving an existing function, select (New Function) in the dropdown.
6. Ideas that have been submitted previously for the same function are listed in the **Ideas in the same function** pane. Check your idea against this list to prevent duplicating an existing suggestion. If there is a similar idea, instead of adding a new suggestion, click its hyperlinked title to add your comments and vote. See Commenting on and voting for ideas.
7. If you do not find a similar idea to piggyback on, enter your new idea:
   - ***Title**

     Enter a descriptive title (128-character limit).
   - ***Detail**

     Enter a detailed description of your idea. Include what issue(s) your idea addresses and why you want it implemented. Format the text as needed to make your idea clear and include screenshots, other images, and URLs that support your proposal. See Customizing messages &web pages.

     TIP: Increase your chances of success

     If this is your first suggestion, familiarize yourself with the submission guidelines to increase the likelihood of your idea's success. See Suggestion Guidelines.
8. Click **Save.** Your idea will be saved with a **Status** of New.

Reference

- Suggestion Guidelines

Step-by-step instructions

- Searching ideas
- Commenting on and voting for ideas
- Customizing emails, messages & web pages

Suggestion Guidelines

To increase the possibility that your requests are popular with other users, use the following guidelines when writing your requests:

- **Include only one idea per request**

  If you have multiple suggestions, make separate requests for each. This will make it easier for other users to vote for ideas they want to see too.

- **Make the Title descriptive of your idea**

  Requests will be listed by their titles, so a descriptive title makes your idea easier to find when someone scrolls through the list. For example instead of titling an idea "MR9 Billing," which is too generic, write "MR9 payments by mobile app" to title a request to add a mobile app payment option in MR9 Billing.

- **Use the dropdowns to specify which product, module, and function the idea relates to**

  When you select the module and function, ideas for the same function appear in the **Ideas in the same function** pane. This way you can check that you are not posting a duplicate suggestion.

- **Explain the idea in depth in the Detail field**

  The more detailed your feature description, the better. Also include some background on the issue(s) the feature would address, and why you want/need it.

Step-by-step instructions

- Suggesting ideas

Commenting on and voting for ideas

Add your input on ideas other MR9 users have submitted and vote for ideas you would like to see implemented. Ideas with higher scores are more likely to be implemented.

1. **Help > Suggest Ideas**
2. In the Suggest Ideas window, search for ideas to comment/vote on. See Searching ideas.
3. Ideas listed in search results include their **Title** and **Detail** (description). To view, comment on, and vote for an idea, click its hyperlinked **Idea No.**
4. In the View Idea window, you can:
   - View more details.
   - See threads of other users' comments.
   - Enter your own comments.
   - Vote for the idea.

   To add your comments/vote, click **Add Thread.**
5. In the **New Thread** panel, enter your contribution to the discussion in ***Comment** *(required).* Format the text as desired. You can also include screenshots, other images, and URLs. See Customizing emails, messages & web pages.
6. To vote for the idea, slide **I like this idea** to Yes before submitting your comment to the thread.
7. Click **Save.** Your comment is saved and appears in the **Threads** pane under the suggestion. MR9 sends you an email acknowledging your comment. If you voted, your vote is added to the **Votes/Score** counts above the suggestion.

NOTE: Votes vs. Score

There are 2 categories that your vote affects:

- **Votes** are the total of all users who selected Yes for **I like this idea.**
- **Score** is limited to 1 per agency.

The 1st person from an agency to respond to an idea and choose Yes will give the idea 1 **Vote** point and 1 **Score** point. If another user from the same agency responds to that same idea and selects Yes, that will give the idea another vote but not increase the score.

Votes help OMTI keep tabs on how many people overall view, respond, and like ideas. **Score** tells OMTI how many agencies like an idea, which is one of the metrics we use in considering which ideas to research and develop.

Step-by-step instructions

- Searching ideas
- Suggesting ideas
- Customizing emails, messages & web pages

Sending messages

You can send messages to other users in your MR9 system, either individually or to an entire Message Group at once.

1. **[Your name on the screen] > Notifications and Messages**
2. There are 3 ways to send messages:
   - **Initiate a new message chain**
     In the Notifications and Messages window, click **New.**
   - **Reply to a message**
     In the Notifications and Messages window, click the hyperlinked **Subject** of the message you want to reply to. In the View Message window, click **More > Reply.**
   - **Forward a message to other MR9 users**
     In the Notifications and Messages window, click the hyperlinked **Subject** of the message you want to reply to. In the View Message window, click **More > Forward.**
3. In the **New Message** window/panel, enter or update information:
   - ***To**
     (In replies, defaults to sender of the original message.) Click in the field and select a recipient in the dropdown. Or start typing a name in the field to narrow the recipients listed.
     If you want to send the message to more than one recipient, repeat this step for each recipient. Or if you want to send the message to all of the members of a Message Group, enter the group name.
   - **Cc**
     Click the hyperlink to add carbon-copy recipients (visible copy recipients). Then click in the field and select a recipient in the dropdown or start typing to narrow the list.
   - **Bcc**
     Click the hyperlink to add blind carbon-copy recipients (hidden copy recipients). Then click in the field and select a recipient in the dropdown or start typing to narrow the list.
   - ***Subject**
     (In replies, defaults to Re: [subject] of the original message. In forwarded messages, defaults to Fw: [subject] of the original message.) Enter a subject line for the email that appears as the hyperlinked Subject in the recipient's Inbox.

- **Deliver On**
  If you want to compose an email now but send at a later time, select a delivery date and time (both required) using the Date Navigator and time field.

- **High Importance**
  Click to flag this message as important.

- **Request Receipt**
  Click to have the recipient automatically acknowledge receiving your message.

- ***Message**

  (In replies and forwarded messages, defaults to include the original message.) Enter and format information as you would an email. See Customizing emails, messages & web pages.

4. Click **Send.** MR9 sends the message and saves the message to the **Sent Message** folder. Sent messages are automatically deleted from the system in the number of days set in System Preferences > General > Notifications and Messages.

NOTE: Other sources of internal messages
You can also send messages from other MR9 functions such as Collections Follow-up reminders to others or yourself (see Following up on collection promises) — and receive automatic messages from other functions, such as alerts about contacts' birthdays, reminders from Notes Logs, Tracking alerts, and notices about new order requests or support ticket submissions sent by clients through MR Connect (see Remembering important client dates, Making entries in notes logs, Moving work to the next step, Importing orders from online requests, and Contact – Support Tickets preferences.

Reference

- Message Group
- Date Navigator
- Notifications and Messages preferences
- MR Connect
- Support Tickets preferences

Step-by-step instructions

- Customizing emails, messages & web pages
- Following up on collection promises
- Remembering important client dates
- Making entries in notes logs
- Moving work to the next step
- Importing orders from online requests

Customizing email preferences

Set up your company's email preferences, and set your own if you require different settings for your email than what the rest of the office is using.

Continued from Email preferences or Setting personal preferences.

1. In the **New Email/Edit Email** panel, enter preferences:

   - **Protocol**

     In New Email only

     In the dropdown, select:

     - **SMTP with ID and password** – Default email protocol.
     - **Microsoft Graph API - Microsoft 365** – If using Microsoft 365 Office.
     - **Microsoft Graph API - Microsoft 365 with GoDaddy** – If using Microsoft 365 Office through GoDaddy.

   - ***SMTP Server**

     SMTP with ID and password only
     Required. Enter your company's email server address/the server address associated with the email address. If Microsoft Graph API - Microsoft 365 or the GoDaddy version was selected, this field is set by default and uneditable.

   - ***SMTP Port**

     SMTP with ID and password only
     Required. Enter the server's port number.

   - **Require Secure Connection**

     SMTP with ID and password only
     Slide to Yes for SSL encryption of your email.

   - **Require Authentication**

     SMTP with ID and password only
     Slide to Yes for the added security of SMTP authentication.

   - **Account Name**

     SMTP with ID and password only
     *Required if **Require Authentication** selection is Yes.* Enter the email address or user name for the email address.

- **Password**
  SMTP with ID and password only
  *Required if **Require Authentication** selection is Yes.* Enter the password associated with the email address.

- ***Sender's Email**
  Required. Enter the email address.

- ***Sender's Name**
  Required. Enter the user name for the email address.

- **Bcc Emails**
  Add default blind carbon-copy recipients (hidden copy recipients) to your emails by entering their email addresses here. For example if you like to keep copies your sent emails, enter your email address here.

- **Signature**
  Add text, images, hyperlinks, and tables to the end of your emails. See Customizing emails, messages & web pages.

- **Default**
  Slide to Yes to make this email address your primary email address for messages sent in MR9. Depending on the function, you may have the option to override which email address you use when sending an individual email.

2. To test the settings for a listed email, see Testing email settings.

   NOTE: Verify your new Microsoft 365 email account first
   Microsoft Graph API authentication is more secure than plain SMTP, and if you select Microsoft Graph API - Microsoft 365 or the GoDaddy version MR9 does not store your email's password in the database. Instead, you must verify your account before you can test or use it. After entering your account details in the New Email panel, click **Verify Account.** Another browser tab will open in your browser with your email address in it. (If required, enter your email password and click **Sign In.)** Click **Yes** to allow Microsoft Graph-MR9 access to your info. After verifying your account, the tab will close and **Verify Account** will be grayed out. You can now test and save your settings.

3. Click **Save.**

Reference

- System Preferences > General
- Users and Groups > Users
- Change Password

Step-by-step instructions

- Setting personal preferences
- Customizing emails, messages & web pages
- Testing email settings

MR Connect

MR Connect gives your clients and third parties access to your office through the internet and on mobile devices. It is an optional plug-in to MR9.

General Connect preferences

System-wide defaults for MR Connect.

Continued from Customizing global preferences.

- ## License Info
  - ***Site Name**

    The name of the site as you want it to appear in **Connect Site** dropdowns in MR9.
  - **Contact URL**

    The web address of your MR Connect *(uneditable).*

- ## Email
  - **Sender's Email**

    The reply email address for your MR Connect comes from the default designated in **System Preferences > General > Email.** To select a different address for automatic response emails from MR Connect, click ▾ and select one from the dropdown. See Email preferences.

- ## Business Units for Contact
  - **To link MR Connect to business unit(s):**

    Click in the **Business Units for Contact** pane. In the **Add Business Units** panel, check the box(es) of BU(s) your MR Connect should be associated with. See Lookup panel. Click **Save.**

    Normally, you select all of your business units, unless you purchased additional MR Connect licenses connected to the same MR9 database.
  - **To change the default business unit:**

    Click

    . In the **Set Default Business** panel, click the hyperlinked **BU ID** of the business unit you want to make the default.
  - **To remove a business unit from the list:**

    Check the BU's box, then click . Click **Yes** in the popup.

- ## Plug Ins

  List of all MR Connect plug-ins you have *(uneditable)*.

BEST PRACTICES: Create a Connect BU for contacts

If you have multiple business units (branch offices), it will be difficult for clients to choose the right business unit when they are entering order requests. For that reason, it is recommended that you create a dummy business unit called Web Order or something similar and make it the default business unit. Then your staff will make the determination as to which business unit should handle a request after it is received.

Reference

- MR Connect
- Email preferences
- Lookup panel
- Business Units

Step-by-step instructions

- Customizing global preferences
- Entering additional contact information
- Customizing communications

Connect Login preferences

Sign-in preferences for your MR Connect site.

Continued from Customizing global preferences.

- **Account will be locked out, after this number of tries**

  Protect accounts from hacking attempts by selecting a number in the dropdown to allow that number of successive incorrect login attempts before MR Connect locks out the user.

  You can unlock an account in the contact's Entity window's Additional pane. See Entering additional contact information.

  NOTE: Security requires lock-out

  MR Connect preferences offer a Never Locked Out option but we do not recommend this option as it is against general security rules for business applications to allow unlimited log-in attempts.

- **Password must meet complexity requirements**

  Slide to Yes to require strong passwords.

- **Enforce reset password periodically**

  Slide to Yes to require regular password resets, then make selections in the related options below.

- **Duration (days) for reset password**

  Works with **Enforce reset password periodically** set to Yes. Select a time limit in the dropdown to require MR Connect users to update their password when the set amount of days has passed.

- **Allow same password as current**

  Works with **Enforce reset password periodically** set to Yes, which allows MR Connect users to keep using the same password when they update their password. Set to No if you want users to enter a new password each time.

- **Use Email as Login Name**

  Slide to Yes to have MR9 set users' login names to their email address. If No is selected, users can change their login names.

- **Allow Social Login for Contact**

  Works with **Use Email as Login Name** set to Yes. Slide to Yes to allow contacts to sign into MR Connect using their *Facebook, Google+,* or *LinkedIn* account.

- **Use Two-Factor Authentication**

  Slide to Yes to require users to verify their identity upon MR Connect sign-in with a second factor in addition to their user name and password. (You can also set up two-factor authentication (2FA) for MR9 users. See Login preferences (MR9).)

  In MR9 & MR Connect, a verification code will be sent to the user's preferred method of communication, which they must then enter into MR9/MR Connect before accessing the site. Authentication is per device, and users can decide to authenticate a device once or every time they sign in on that device. See Verifying your device.

Reference

- MR Connect
- Lookup panel
- Two-factor authentication (2FA)
- Login preferences (MR9)

Step-by-step instructions

- Customizing global preferences
- Entering additional contact information
- Customizing communications
- Verifying your device

Invitation Letter preferences

Email invitations to contacts to use MR Connect and include their login credentials.

Continued from Customizing global preferences.

To add or edit invitation letter templates, and choose the default email template for invitation letters to contacts, see Customizing communications.

NOTE: Add your company info to invitations

Be sure to add your company contact information to the invitation templates before sending them. Include your company logo and other branding too. You might also want to change the Subject lines to include your company name and/or the name of your MR Connect if you call it something else.

Reference

- MR Connect

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Connect Forgot Password Email preferences

Email instructions sent to contacts for resetting their forgotten MR Connect passwords.

Continued from Customizing global preferences.

To customize the default ***Email Subject** and ***Email Message** *(both required)* for emails sent to contacts when they request a new password, see Customizing emails, messages, & web pages.

Reference

- MR Connect

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages, & web pages

Branding – Connect preferences

Customize the look and feel of your MR Connect site.

Continued from Customizing global preferences.

1. Customize contents

- **General**

  *App Title in Web Browser

  Required. Enter text that will appear as the browser header for your MR Connect.

- **Login Page**

  - ***Login Page Image**

    Required. Image that appears on your MR Connect login/welcome page.

    1. Before uploading, check that your logo image file conforms to these guidelines:
       - **Logo image format:** PNG
       - **Logo image file size:** File size has a direct impact on loading time of login page. Smaller file size is strongly recommended.
       - **Logo image ratio:** 600 x 480 px (width-to-height)
       - **Logo image transparency:** Transparent image is recommended.
    2. To add your company logo, see Uploading logos for insertion.

  - **Login Page Description for Contact**

    Enter text that will appear on your contact MR Connect login/welcome page. To format the text, see Customizing emails, messages & web pages.

  - ***Login Page Title for Contact**

    Required. Enter text for your contact MR Connect login/welcome page header.

  - **Login Page Background Color**

  - To change the color of your MR Connect login/welcome pages, see Picking colors in MR9.

- **Function Pages**
  - ***Top Logo Image**

    Required. Image that appears at the top of all of your MR Connect pages (except the login/welcome page).

    1. Before uploading, check that your logo image file conforms to these guidelines:
       - **Logo image format:** PNG
       - **Logo image file size:** File size has a direct impact on loading time of entire application. Smaller file size is strongly recommended.
       - **Logo image ratio:** 80 x 50 px (width-to-height)
       - **Logo image transparency:** Transparent image is recommended.
    2. To add your company logo, see Uploading logos for insertion.

  - **Menu Background Color**

    To change the background color of the top bar of your MR Connect internal pages, see Picking colors in MR9.

  - **Menu Font Color**

    To change the color of text in the top bar of your MR Connect internal pages, see Picking colors in MR9.

  - **Function Background Color**

    To change the background color of your MR Connect function page headers, see Picking colors in MR9.

  - **Function Font Color**

    To change the color of text in your MR Connect function page headers, see Picking colors in MR9.

  - **Grid Header/Footer Color**

    To change the background color of results grid headers and footers in your MR Connect function pages, see Picking colors in MR9.

  - **Section Background Color**

    To change the background color of section headers in your MR Connect function pages, see Picking colors in MR9.

2. ## Preview

   MR9 gives you the option to preview your MR Connect pages before your contacts see them.

   - In the **Login Page** pane, click **> Preview Contact Login Page** to preview contact login/welcome page customizations.
   - In the **Function Pages** pane, click **> Preview Function Page** to preview function page customizations.

3. ## Go live

   When you are finished customizing and previewing pages, click **Save.**

Reference

- MR Connect

Step-by-step instructions

- Customizing global preferences
- Uploading logos for insertion
- Customizing email messages & web pages
- Picking colors in MR9

Contact – Announcement preferences

Give contacts something informative to read after they sign into your MR Connect site. Use this feature to tell clients news about your company, how to use the site, and basic contact information. Update information as often as you like.

Continued from Customizing global preferences.

1. Enter text that will appear on the main MR Connect page after contacts sign in. To format the text, see Customizing emails, messages & web pages.
2. When you are finished, click **Save.**

Reference

- MR Connect

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages & web pages

Contact – Accessibility preferences

Designate which areas of MR Connect contacts can access.

Continued from Customizing global preferences.

Default is to let contacts access all areas of MR Connect. To choose which MR Connect clients can use online, check **Access** of functions they can use and uncheck functions you want to hide from contacts.

If the function is checked, contacts can:

- **Attention**

  View tracking information about their orders.

- **Orders**

  Download and review records they ordered. View the status of their orders and related parts.

- **Account Activity**

  View their invoices and pay history, plus pay invoices online.

- **Repository**

  Download files.

- **Online Orders**

  Order records, update orders, and upload files.

- **Support Tickets**

  Ask questions and get answers from your staff with a paper trail.

Reference

- MR Connect
- Attention preferences
- Orders preferences
- Account Activity preferences
- Repository preferences
- Online Orders preferences
- Support Tickets preferences

Step-by-step instructions

- Customizing global preferences
- Managing users to notify

Contact – Attention preferences

Designate what kinds of tracking information contacts can view in the Attention window in MR Connect.

Continued from Customizing global preferences.

- ### Tracking Steps to show

  All tracking steps that have been selected to appear in MR Connect are listed by their **Tracking Item** and **Step Name.**

  - **To display tracking steps on MR Connect:**

    In the **Tracking Steps to show** pane, click . In the **Add Steps** panel, select an option in the **Tracking Item** dropdown. (Tracking Items are set in Lists > Tracking > Item.)Then check the box(es) of step(s) related to the Tracking Item selected that you want to appear in the Attention grid in MR Connect. See Lookup panel. Click **Save.**

  - **To remove tracking steps from the list:**
    In the **Tracking Steps to show** pane, check the box(es) of step(s) you want to remove, then click . Click **Yes** in the popup.

- ### Options

  - **Contact To** – In MR Connect, open orders that require the client's attention have an MR user name listed. The client can click next to the user name to send a quick message instructing them how to proceed with the order. In the dropdown, select what category of user will appear as contacts:
    - **Assign To** – Messages will go to the person assigned to track the record.
    - **Client Rep** – Messages will go to the person assigned to oversee orders for the contact.
    - **Processor** – Messages will go to the case coordinator for the order.
  - **Show Tracking Steps Remarks** – Default is Yes. Set to No if you do not want to publish to MR Connect any special notes that your staff made in tracking steps in MR9.

Reference

- MR Connect
- Lists > Tracking

Step-by-step instructions

- Customizing global preferences

Contact – Orders preferences

Preferences for viewing orders in MR Connect.

Continued from Customizing global preferences.

- ## Options

  - ### Show Tracking

    Default is Yes. Slide to No if you do not want clients to see the current tracking status of individual parts.

  - ### Show Tracking Step Remarks

    Default is Yes. Slide to No if you do not want clients to see notes your staff made about current tracking steps.

  - ### Allow Order Parties to access Orders function

    Default is No. Slide to Yes if you want to allow all ordering parties, not only the original party, to be able to view orders and download files.

Reference

- MR Connect
- Tracking

Step-by-step instructions

- Customizing global preferences

Contact – Account Activity preferences

Preferences for online invoice access and payment.

Continued from Customizing global preferences.

- ## Options

  - ### Allow invoice access to Sold To party

    For orders that have different Bill To and Sold To parties, default is only Bill To party can access the invoice. Slide to Yes to allow both parties access to the invoice.

  - ### Allow invoice payment to Sold To party

    For orders that have different Bill To and Sold To parties, default is only Bill To party can pay the invoice. Slide to Yes to allow both parties to pay for the invoice.

- ## Online Payment

  For e-commerce, MR Connect integrates with several online payment processing services. If you want to offer online payment of invoices, including COD invoices, through MR Connect, you must set up an account with one of these services and enter your credentials here.

  Select a service in the **Online Payment Method** dropdown:

  - **Do not use** – Default.
  - **Authorize.net** – Visa's payment gateway that accepts Visa, MasterCard, American Express, Discover, JCB, and Diners Club. To set up your Authorize.net business account, see Setting up an Authorize.net business account.
  - **First Data (Clover)** – Payment gateway that accepts VISA, Mastercard, American Express, Discover, JCB, Diners Club, Paypal, e-Check, and gift cards. To set up your Clover business account, see Setting up a Clover business account.
  - **First Data (Payeezy)** – *Not recommended.* Payment gateway that is being replaced by Clover and will soon be discontinued.
  - **PayPal** – Easy to set up and integrate with MR9. Good choice if your clients have their own PayPal accounts. Accepts credit card payments, debit card payments, direct payments from bank accounts, and PayPal account payments. To set up your PayPal business account, see Setting up a PayPal business account.
  - **Square** – Payment gateway that accepts Visa, MasterCard, American Express, Discover, JCB, and UnionPay. To set up your Square business account, see Setting up a Square business account.
  - **Stripe** – Payment gateway that accepts Visa, MasterCard, Maestro, American

Express, Discover, Diners Club, JCB, Union Pay, Google Pay, and Apple Pay. To set up your Stripe business account, see Setting up a Stripe business account.

- **Users to notify for Online Payment**

  To choose which MR9 users are alerted via Notifications and Messages when a contact makes a payment online, see Managing users to notify.

- **Payment Receipt Email**
  - To customize ***Email Subject** and ***Email Message** *(both required)* for payment receipt notices, see Customizing emails, messages, & web pages.

Reference

- Sold To vs. Bill To
- COD invoices
- MR Connect
- PayPal
- Payment gateway
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Publishing COD invoices
- Setting up a PayPal business account
- Setting up an Authorize.net business account
- Setting up a Clover business account
- Setting up a Square business account
- Setting up a Stripe business account
- Managing users to notify
- Customizing emails, messages, & web pages

Setting up a PayPal business account

Before your clients can pay invoices online in MR9, you must set up a business account with one of the accepted online payment processing services and enter your credentials in MR9. Follow these instructions to set up a PayPal business account and enter your credentials in MR9.

Continued from Contact – Account Activity preferences.

NOTE: PayPal site instructions & wording might be different

These instructions might be slightly different from the actual PayPal site, however, the concept is the same. You must set up a business account on PayPal and get API credentials which you then enter in MR9 before you can accept payments online.

1. Sign up for a **PayPal Payment Pro** business account on PayPal.com.
2. Log in after you sign up.
3. Click **> Account Settings.**
4. Under Account Settings, click **Account access,** then click **Update** in **API access** section.
5. On the API Access page in the **NVP/SOAP API Integration (Classic)** section, click **Manage API Credentials.**
6. On the **Request API Credentials – PayPal** page, click the **Request an API signature** button, then click **Agree and Submit** to generate the API signature.
7. On the View or Remove API signature page, click each **Show** hyperlink to reveal each value that you will then copy and paste into your Account Activity Connect Preferences.
8. In MR9 go to Connect Preferences > Contact – Account Activity and click **Edit.**
9. Add your API credentials to the **Online Payment** pane:

   - **Online Payment Method**
     Select PayPal in the dropdown.
   - ***User Name**
     Required. Copy and paste your company's **API username** from your PayPal account.
   - ***Password**
     Required. Copy and paste the **API password** from your PayPal account.
   - ***Signature**
     Required. Copy and paste the digital ID **Signature** from your PayPal account.

10. Click **Save.**

TIP: Use a different service if your clients do not have PayPal accounts

If your clients resist using your online payment option because they do not have/do not want a PayPal account, you can use one of the MR9 accepted payment gateways instead:

- **Authorize.net** – Visa's payment gateway accepts Visa, MasterCard, American Express, Discover, JCB, and Diners Club.
- **First Data (Payeezy)** – Payment gateway accepts VISA, Mastercard, American Express, Discover, JCB, Diners Club, Paypal, e-Check, and gift cards.
- **Square** – Payment gateway that accepts Visa, MasterCard, American Express, Discover, JCB, and UnionPay.
- **Stripe** – Payment gateway that accepts Visa, MasterCard, Maestro, American Express, Discover, Diners Club, JCB, Union Pay, Google Pay, and Apple Pay.

Reference

- MR Connect
- PayPal
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- Setting up an Authorize.net business account
- Setting up a Payeezy business account
- Setting up a Square business account
- Setting up a Stripe business account

Setting up an Authorize.net business account

Before your clients can pay invoices online through MR Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in MR9. Follow these instructions to set up an Authorize.net business account and enter your credentials in MR9.

Continued from Contact – Account Activity preferences.

NOTE: Authorize.net site instructions & wording might be different

These instructions might be slightly different from the actual site, however, the concept is the same. You must set up a business account on Authorize.net and get API credentials which you then enter in MR9 before you can accept payments online.

1. Sign up for an account on Authorize.net.
2. Use the activation link in your Authorize.net welcome email to activate your account and sign in.
3. At first, your account will be in test mode for you to submit test transactions to validate your payment solution can connect to your account. Work with your payment solution developer to test your connection to Authorize.net. After your connection is validated, disable Test Mode by clicking the orange banner at the top of the Authorize.net Merchant Interface.
4. After you have validated your connection and are ready to accept payments, click **Account** in the Merchant Interface, then click **Settings.**
5. Under **General Security Settings**, click **API Credentials & Keys.**
6. Under **Create New Key(s)**, click **New Transaction Key**.
7. Click **Submit**.
8. When prompted, request and enter a validation PIN. Your API Login ID and Transaction Key appear.
9. In MR9 go to Connect Preferences > Contact – Account Activity and click **Edit.**
10. Add your API credentials to the **Online Payment** pane:

    - **Online Payment Method**
      Select Authorize.net in the dropdown.
    - ***API Login ID**
      Required. Copy and paste your company's **API Login ID** from your Authorize.net account.

- ***Transaction Key**
  Required. Copy and paste the **Transaction Key** from your Authorize.net account.

11. Click **Save.**

Reference

- MR Connect
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- Setting up a PayPal business account
- Setting up a Payeezy business account
- Setting up a Square business account
- Setting up a Stripe business account

Setting up a Payeezy business account

Before your clients can pay invoices online through MR Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in MR9. Follow these instructions to set up a Payeezy business account and enter your credentials in MR9.

Continued from Contact – Account Activity preferences.

NOTE: Payeezy site instructions & wording might be different

These instructions might be slightly different from the actual site, however, the concept is the same. You must set up a business account on Payeezy and get API credentials which you then enter in MR9 before you can accept payments online.

1. Set up free developer account

1. Go to Payeezy's developer portal.
2. Click **Create Account.**
3. Enter your first name, last name, and email address.
4. Select "Developer - As A Merchant" in the dropdown.
5. Check the reCaptcha box.
6. Click **Create Your Account.**

2. Create your API

1. Login to your Payeezy developer account and navigate to the "APIs" page.
2. Click **+ ADD A NEW API.**
3. Name your application.
4. Click on the API you just created to see your API Key and API Secret.

3. Test & get certified

1. In the Sandbox region of the developer site, test your API using the provided demo gateway account and your API Key and API Secret, the provided demo Merchant Token and JS Security Key, and "NOIW" as the TA Token.
2. Select Direct API as the integration method.
3. Complete the Payeezy Certified Developer registration and submit a sample transaction from the Sandbox.

4. Click **Certify** and submit the certification form.

4. Add your merchant account

1. After completing certification, you will be automatically directed to the Add Merchant page. Click **Live,** then click **Add a merchant.**
2. Select **Sign up for a merchant account** and follow the instructions.

5. Take your account live

1. Replace Sandbox URL with live environment URL.
2. Replace Sandbox merchant token with live merchant token.
3. Replace Sandbox JS_Security_key with live JS_Security_key.
4. Ensure that API key and API secret are enabled for live processing.
5. Replace TA_TOKEN (if used) with the live TA_TOKEN.

6. Enter your credentials in MR9

1. In MR9 go to Connect Preferences > Contact – Account Activity and click **Edit.**
2. Add your API credentials to the **Online Payment** pane:
   - **Online Payment Method**
     Select First Data (Payeezy) in the dropdown.
   - ***API Key**
     Required. Copy and paste your company's **API Key** from your Payeezy account.
   - ***API Secret**
     Required. Copy and paste the **API Secret** from your Payeezy account.
   - ***Merchant Token**
     Required. Copy and paste the **Merchant Token** from your Payeezy account.
3. Click **Save.**

Reference

- MR Connect
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- Setting up a PayPal business account
- Setting up an Authorize.net business account
- Setting up a Square business account
- Setting up a Stripe business account

Setting up a Stripe business account

Before your clients can pay invoices online through MR Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in MR9. Follow these instructions to set up a Stripe business account and enter your credentials in MR9.

Continued from Contact – Account Activity preferences.

NOTE: Stripe site instructions & wording might be different

These instructions might be slightly different from the actual site, however, the concept is the same. You must set up a business account on Stripe and get API credentials which you then enter in MR9 before you can accept payments online.

1. Set up Stripe account

1. Sign up for an account on Stripe.
2. Click the verification link in the "Verify your email to start using Stripe" email. It will automatically take you to the Stripe site. Log in to your account.
3. In the Stripe dashboard, click **Activate your account.**
4. Complete all the fields on the page. Set **Your website** to your MR9 URL.
5. Click **Activate account.** Stripe reviews and automatically activates accounts. If there is any problem in the review, you will be notified. If so, click **Review** and follow the instructions.

2. Enable Stripe Connect

1. In the Stripe dashboard, click **Settings.**
2. Click **Get Started** in the Connect section.
3. Click **Get Started** on the Connect page.
4. Click **Build a platform or marketplace** on the popup.
5. In the Stripe dashboard, click **Settings.** Then click **Settings** in the Connect section.
6. On the Connect Settings page, check that **Custom** is enabled in the **Account types** section.
7. Click **Developers > API Keys.**
8. Make sure that you are not using test data. If this is the case, switch the **View test**

data toggle off. Test API keys will **not** work in MR9. Keep your Stripe dashboard open.

3. ## Enter your credentials in MR9

    1. In MR9 go to Connect Preferences > Contact – Account Activity and click **Edit.**
    2. Add your API credentials to the **Online Payment** pane:

        - **Online Payment Method**
          Select Stripe in the dropdown.
        - ***Publishable Key**
          Required. Copy the value from **Token** column in the **Publishable key** row in your Stripe dashboard and paste here.
        - ***Secret Key**
          Required.

            1. In your Stripe dashboard > **Developers > API Keys,** click **Reveal live key token.**
            2. Copy and paste the value of the **Secret key** from the popup into MR9.

            IMPORTANT: Copy & save! You cannot look up the secret key in Stripe

            Once you click **Reveal live key token,** you won't be able to see the key again in Stripe after closing this window. Make sure you copy it and save it somewhere safe and private.

    3. Click **Save.**

Reference

- MR Connect
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- Setting up a PayPal business account
- Setting up an Authorize.net business account
- Setting up a Payeezy business account
- Setting up a Square business account

Payment gateway

A **payment gateway** is an online system for processing credit card payments and other forms of electronic payment for online vendors. Unlike PayPal, they generally do not require the end users (your clients) to have an account with them to pay invoices online.

Payment gateways that work with MR Connect are:

- **Authorize.net** – Visa's payment gateway accepts Visa, MasterCard, American Express, Discover, JCB, and Diners Club.
- **First Data/Payeezy** – Payment gateway accepts VISA, Mastercard, American Express, Discover, JCB, Diners Club, Paypal, e-Check, and gift cards.
- **Square** – Payment gateway that accepts Visa, MasterCard, American Express, Discover, JCB, and UnionPay.
- **Stripe** – Payment gateway that accepts Visa, MasterCard, Maestro, American Express, Discover, Diners Club, JCB, Union Pay, Google Pay, and Apple Pay.

Reference

- MR Connect
- Account Activity preferences
- PayPal

Step-by-step instructions

- Setting up a PayPal business account

PayPal

PayPal is an online system for money transfers that eliminates the need for mailing paper invoices and checks. It handles credit card payments and other forms of electronic payment, including debit card payments, direct payments from bank accounts, and PayPal account payments.

NOTE: PayPal is easy to set up & use if your clients have PayPal accounts

PayPal is easy to set up and integrate with MR9. And it's easy for your clients if they have their own PayPal accounts. Otherwise, it can cost them more in additional fees and is more of a hassle than using a payment gateway (such as Square or Stripe) if they do not have a PayPal account.

Reference

- MR Connect
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- Setting up a PayPal business account

Contact – Repository preferences

Set preferences for repository access and notifications.

Continued from Customizing global preferences.

- **Order-level Notification**

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about file uploads to order repositories, see Customizing emails, messages, & web pages.

- **Part-level Notification**

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about file uploads to part repositories, see Customizing emails, messages, & web pages.

- **Record-level Notification**

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about file uploads to record repositories, see Customizing emails, messages, & web pages.

- **Invoice-level Notification**

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about file uploads to invoice repositories, see Customizing emails, messages, & web pages.

- **Users to notify**

  To choose which MR9 users are alerted via Notifications and Messages when you send repository notifications to clients, see Managing users to notify.

- **Others**

  - **Allow download of paid records only**

    Slide to Yes to prevent contacts from accessing records before you receive payment in full for original invoices. This can help to improve your collections, because attending attorneys will have to pay first before getting a transcript.

  - **Always allow download for scheduling client**

    Slide to Yes to if the invoices for clients initiating jobs do not have to be fully paid

before transcripts can be downloaded. Since scheduling clients are normally your good clients, you might want to set to Yes so as not to irritate your client base.

- **Enable option to set 'Mark as Reviewed' flag at the time of downloading files**

  Slide to Yes to give clients downloading files via MR Connect the option to have MR Connect automatically stamp the date and time a file was downloaded in the **Reviewed** column of their MR Connect repository. If set to Yes, a popup will appear whenever a contact clicks **Download** in their online repository asking if they want the reviewed date and time set for the downloaded files.

Reference

- MR Connect
- Repository
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages, & web pages

Contact – Online Orders preferences

Preferences for handling online order requests.

Continued from Customizing global preferences.

- ## General
  - ### *Business Unit

    Select the default business unit that requests made by clients through MR Connect will be associated with.
  - ### Allow Lookup Location

    Slide to Yes to allow clients to select locations in your MR9 Location database where they want records from, subpoenas served, etc.

- ## Users to notify

  To choose which MR9 users are alerted via Notifications and Messages when new order requests are received, see Managing users to notify.

- ## New Order Notification
  - ### Send Notification for New Order

    Slide to Yes if you want MR9 to automatically email an acknowledgement of a new order request. ***Email Subject** and ***Email Message** fields appear.
  - To customize ***Email Subject** and ***Email Message** *(both required)* for new order notifications, see Customizing emails, messages, & web pages.

Reference

- MR Connect
- Locations
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages, & web pages

Contact – Reward Points preferences

Designate who is notified when contacts request point redemptions.

Continued from Customizing global preferences.

To choose which MR9 users are alerted via Notifications and Messages when a contact wants to redeem reward points, see Managing users to notify.

Reference

- MR Connect
- Notifications and Messages
- Fulfill Points Redemption Orders

Step-by-step instructions

- Customizing global preferences
- Managing users to notify

Contact – Support Tickets preferences

Preferences for support ticket notifications.

Continued from Customizing global preferences.

- ## Ticket Notification

  Enter text and MR9 data fields to alert contacts via email that there is a response to their support ticket and/or include response information in email. For example you will probably want to include the text of the latest reply (LastReplyMessage datafield) so the contact does not have to go to MR Connect to see your reply. To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about support tickets, see Customizing emails, messages, & web pages.

- ## Users to notify

  To choose which MR9 users are alerted via Notifications and Messages when a contact submits a support ticket, see Managing users to notify.

Reference

- MR Connect
- Notifications and Messages
- Support tickets

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages, & web pages
- Managing users to notify

Managing users to notify

Select which MR9 users get automatic notices via Notifications and Messages when a request is made through MR Connect.

Continued from Defining tracking steps, Contact – Account Activity preferences, Contact – Online Orders preferences, Contact – Reward Points preferences, or Contact – Support Tickets preferences.

- **To automatically alert users to a request**

  1. Click in the **Users to notify** pane.
  2. In the **Add Users** panel, check the box(es) of MR9 user(s) to be notified. See Lookup panel.
  3. Click **Save.**

- **To remove users from the list**

  Check their box(es) in the **Users to notify** pane, then click . Click **Yes** in the popup.

Reference

- Notifications and Messages
- MR Connect
- Lookup panel

Step-by-step instructions

- Customizing global preferences
- Defining tracking steps
- Account Activity preferences
- Online Orders preferences
- Reward Points preferences
- Support Tickets preferences
- Communicating within MR9

Five basic accounts

Basic accounting rules group all financial transactions into five fundamental types of "accounts." That is, everything that accounting deals with can be placed into one of these five accounts:

- **Assets** – things you own (such as accounts receivable or cash)
- **Liabilities** – things you owe (such as accounts payable or refund)
- **Equity** – overall net worth (assets minus liabilities)
- **Income** – increases net worth
- **Expenses** – decrease net worth

NEXT: The balance between assets, liabilities and equity

The accounting equation is the basis of double-entry accounting.

Reference

- The accounting equation
- Debits and credits
- Double-entry examples

The accounting equation

Anything of value controlled by a business is referred to as its assets. This could be cash or anything that could be converted to cash. For a new business, assets originate from two possible sources:

- **Investors** who buy ownership in the business
- **Creditors** who extend loans to the business

Those who contribute assets to a business have legal claims on those assets. Since the total assets of the business are equal to the sum of the assets contributed by investors and the assets contributed by creditors, the following relationship holds and is referred to as the accounting equation:

Assets = Liabilities + Owners' Equity
Valuables = Claims on the Valuables

The accounting equation holds at all times over the life of the business. When a transaction occurs, the total assets of the business may change but the equation will remain in balance. The accounting equation serves as the basis for the balance sheet.

NEXT: Double-entry bookkeeping

Instead of trying to keep track of assets and liabilities as plus or minus values in a single column, double-entry bookkeeping, such as the MR9 system, uses Debit and Credit columns. In double-entry accounting, the total amount of each transaction is entered twice: once in the Debit column and once in the Credit column, with each entry assigned to a different account in the chart of accounts.

Reference

- Five basic accounts
- Debits and credits
- Double-entry examples

Debits and credits

In double-entry accounting, rather than using a single column for each account and entering some numbers as positive and others as negative, we use two columns for each account and enter only positive numbers. Entries in the left column are referred as debits, and entries in the right column are referred to as credits.

Two accounts always are affected by each transaction, and one of those entries must be a debit and the other must be a credit of equal amount. Actually, more than two accounts can be used if the transaction is spread among them, just as long as the sum of debits for the transaction equals the sum of credits for it.

Whether a debit or a credit increases or decreases an account balance depends on the type of account. Asset and expense accounts are increased on the debit side, and liability, equity, and revenue accounts are increased on the credit side.

NEXT: How common financial transactions are recorded in double-entry bookkeeping

Review some examples of how income, obligations, and payments are handled in double-entry accounting.

Reference

- Five basic accounts
- The accounting equation
- Double-entry examples

Double-entry examples

In the following examples, we used $500.00 as the transaction amount.

Invoice (sale)

When an invoice is generated, Accounts Receivable and Revenue increase.

A/R	
500.00 (increase)	

Revenue	
	500.00 (increase)

Payment (cash receipt)

When a payment is received, Cash (asset) increases and Accounts Receivable (asset) decreases.

Cash	
500.00 (increase)	

A/R	
	500.00 (decrease)

Credit Memo (discount)

When a credit memo is issued as a discount, Accounts Receivable (asset) decreases, and Discount (expense) increases.

A/R	
	500.00 (decrease)

Discount	
500.00 (increase)	

Debit Memo (returned check)

If a debit memo is issued for a returned check, Cash (asset) decreases and Accounts Receivable (asset) increases, in a reversal of the original transaction (example #2).

Cash	
	500.00 (decrease)

A/R	
500.00 (increase)	

Void

If an invoice is voided, Accounts Receivable (asset) and Revenue (income) decrease, as a reversal of the original sale (example #1).

A/R	
	500.00 (decrease)

Revenue	
500.00 (decrease)	

Write-off

If an invoice is written off, Accounts Receivable (asset) decreases and Bad Debt (expense) increases.

A/R	
	500.00 (decrease)

Bad Debt	
500.00 (increase)	

Duplicate Payment

When a duplicate payment is received, Cash (asset) and Refund (liability) increase.

Cash	
500.00 (increase)	

Refund	
	500.00 (increase)

Refund

When a refund check is issued, Cash (asset) and Refund (liability) decrease.

Cash	
	500.00 (decrease)

Refund	
500.00 (decrease)	

Reference

- Five basic accounts
- The accounting equation
- Debits and credits

Modules & functions

All MR9 functions are organized into menus at the top of the MR9 web page, grouped by module. Functions are accessible by clicking next to module names.

- **Orders**

  Manage and track orders.

- **Production**

  Turn in orders. Generate production sheets. Print envelopes and labels. Ship orders.= Store files.

- **Billing**

  Invoice orders and perform other billing tasks, such as exporting invoices for e-billing= and transferring invoices.

- **Inquiry**

  Find information in your MR9 database using preset searches.

- **Receivables**

  Credit and track receivables in MR; plus assess finance charges, print monthly reports,= and monitor collection efforts.

- **Payables**

  Generate forms and reports, such as sales commission reports. Cut checks.

- **Reports**

  Generate reports to analyze your business's productivity, profitability and other=relevant data.

- **Tools**

  Import your address book; bulk update database entries; use tags; create and= customize templates; find notes; monitor file downloads; backup database; use custom= database queries; and integrate financials with *QuickBooks.*

- **Entities**

  Manage clients, locations, and your business's profit centers.

- **Setup**

  Customize MR9 to fit your business.

- **Connect**

  Manage your MR Connect plug-in that gives clients and third parties access to your= office through the internet and on mobile devices.

- **Help**

  Access contextual help on every screen.

- **Personal**

  Customize MR9 for your personal work environment, handle messages, access locked= data, update your password, and log out.

Reference

- Function layout
- Accounts receivable

Function layout

Functions are laid out in windows, which are divided into panes, with supplemental options in fly-out panels.

- ## Windows

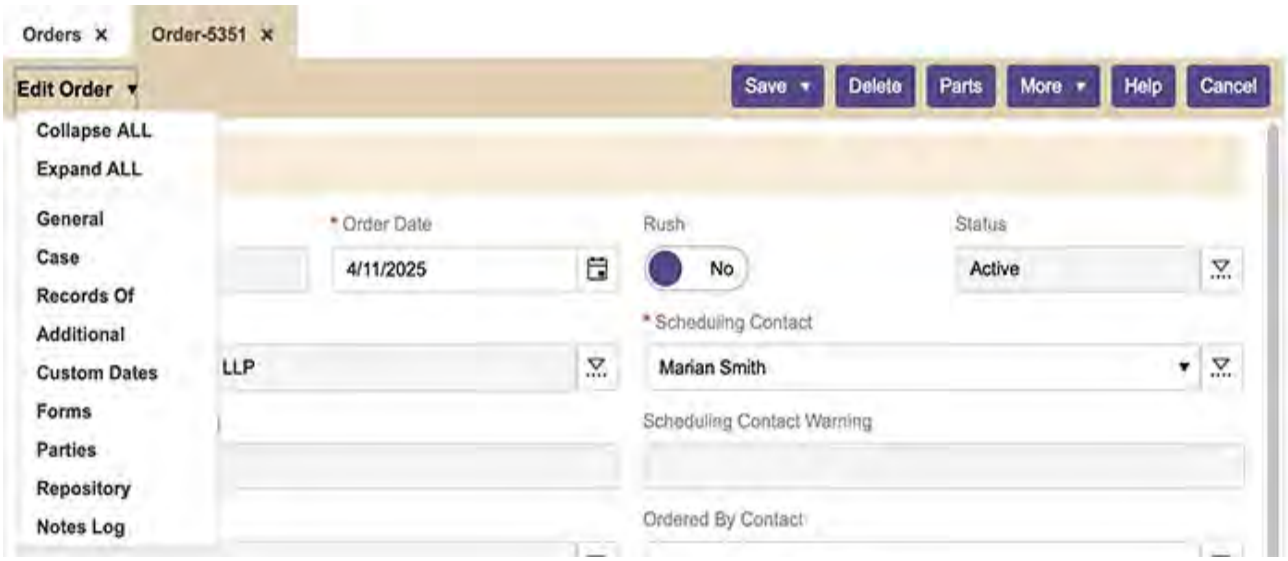
  When you select a function, it opens in the main browser window with a labeled tab at the top. If you open additional functions in this window, they will overlay the existing functions and their labeled tabs will appear at the top of the window.

  - Switch to any open function by clicking its tab.
  - Close a function window by clicking its tab label's X or clicking **Close.**

- ## Panes

  Different aspects of each function appear in their own panes in the function's main browser window. The default view of any function displays all of its related panes.

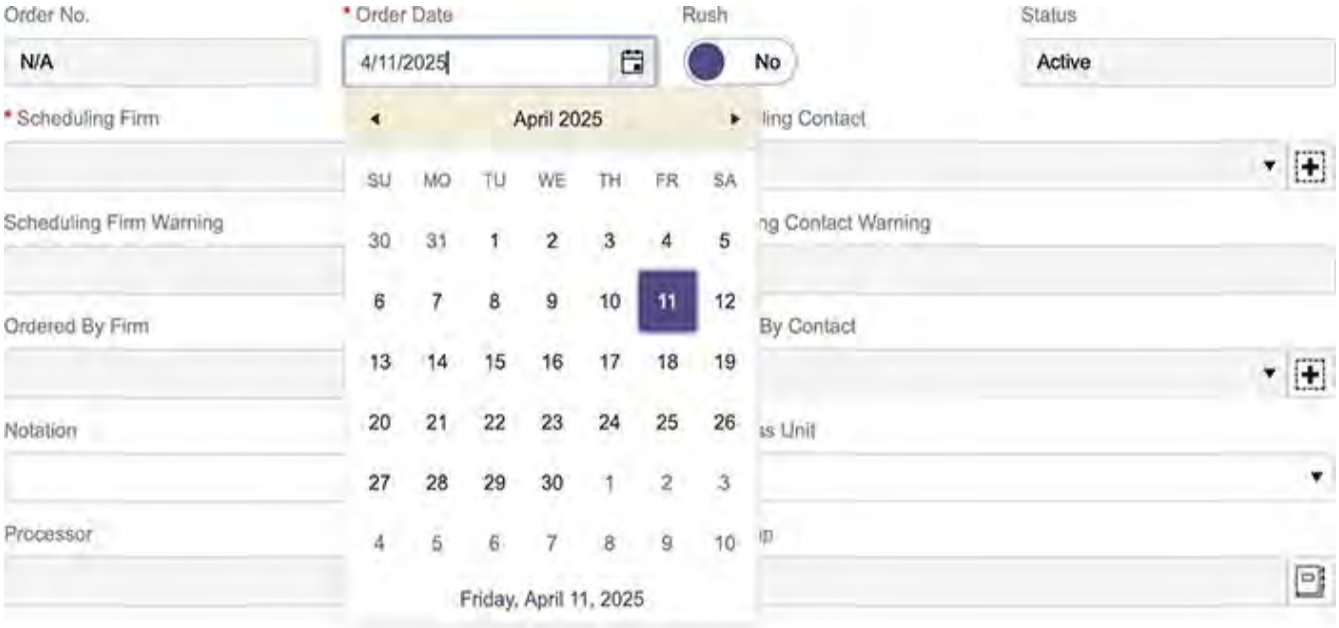
  - To hide a pane, click ⊖ next to the pane's label.
  - To view a hidden pane, click ⊞ next to the pane's label.
  - Click ▼ next to the window's label and select:
    - Collapse ALL to hide all panes.
    - Expand ALL to view all panes.
    - An individual pane's name to jump to that pane.



- When in View mode, clicking **Edit** will switch you to Edit mode in the same pane you are currently viewing so you don't lose your place if you want to update information.
- In Edit mode, you can use the Tab key to move forwards from field to field, and Shift+Tab to move backwards from field to field.

- ## Panels

Function options that are accessed by buttons to the right of a field or pane label have their own panels that drop down, pop up or fly out to the right.



NOTE: Required fields

Fields and options that include * in their labels require an entry/selection before you can save your work.

NOTE: All database entries include 2 uneditable fields

All entries you make in MR9 — whether it's an order, part, invoice, or entity, include a **Created** field (which displays when the entry was made and by who) and a **Last Modified** field (which displays when the entry was last updated and by who). Both of these fields are populated automatically by MR9 and are uneditable.

TIP: Tab between fields & other shortcuts

Fields in panes and panels are designed so that you can move between them and make some selections without a mouse:

- Use the **Tab** key to move forward from field to field. (Lookup fields are skipped when tabbing.
- To move backward, use **Shift + Tab.**
- To make a selection in a dropdown, enter the first letter of the selection. If more than one selection begins with the first letter (for example, states that begin with C, pressing the letter key again will advance through the choices that begin with the same letter.

TIP: Resize multi-line input boxes to see entire entry

Drag the bottom-right handle of a multi-line box in an Edit window to view the contents without scrolling. (Not available in Internet Explorer or Edge browsers.)

Reference

- Modules & functions
- Lookup panel

Step-by-step instructions

- Searching in MR9
- Sorting rows
- Customizing grids
- Entering dates & times
- Accessing results
- Exporting & printing MR9 results

Mail Composer

MR9's email app for sending MR9 information electronically, plus files and your own messages.

Step-by-step instructions

- Emailing from MR9

Notes Logs

In any View or Edit window, notes entered either by a user or automatically by MR9 appear in a chronological log.

NOTE: Log entries are your internal paper trail

You can trust these notes log because every entry is stored and listed separately, and entries cannot be edited nor deleted. Notes can only be canceled — but they remain in the log with Canceled information. (See Canceling notes.)

Notes entered in any Notes Log are for internal use only and are not published on MR Connect or in any correspondence with clients or locations.

Reference

- MR Connect

Step-by-step instructions

- Making entries in notes logs
- Managing notes logs
- Canceling notes

Searching in MR9

You search MR9's database through the **Search By** pane in general function windows or a **Search By** field in a Lookup panel.

Both work similarly:

1. Set search parameters

Use the filters or checklist to enter your search parameters.

- **Search By panes** have multiple filters to narrow a search.
- **Lookup panels** have only the **Search By** field (and sometimes a few other filters), or they have a checklist of options.

NOTE: Text search results include similar entries

MR9 uses similarity search logic for text entered in search filters so it returns results that include all possible entries that include your search terms, not only entries that are an exact match. For example, if you searched for "angela smith" results such as "Angela J. Smith" and "Angela Wurtsmith" would also be listed in the results.

2. Get results

Click . MR9 displays any information in its database that meets your search criteria in a **Results pane**. Or if using a Lookup panel for a single search field, as many of the options as can fit display in the field.

Click the hyperlinked text of your desired result in the Results pane to select it or click and select one of the shortcuts. See Accessing results.

TIP: Clear all search filters at once

If you want to make a different search in the same function, click ▾ next to **Search By** in the Search By pane and select **Clear All.** All the search fields will clear or revert to the default.

Reference

- Search By pane
- Lookup panel
- Results pane

Step-by-step instructions

- Accessing results
- Searching orders
- Searching firms
- Looking up firms
- Searching contacts
- Looking up contacts
- Searching locations
- Looking up locations

Entering dates & times

Instead of typing in dates, use the Date Navigator attached to every date field to view and select dates. Some date fields have related time fields that must also be filled.

- **Dates**

  Click . Then in the popup calendar, to:

  - **Select another date**

    Click the date you want.

  - **Move to the previous month**

    Click ◂.

  - **Move to the next month**

    Click ▸.

  - **Choose a different month**

    Click the month name, then select from the twelve months that appear.

  - **Choose another year**

    Click the month name. Then click ◂ or ▸ next to the year.

- **Times**

  Click , then select a time in the dropdown. If the time you want is not listed, select the closest time, then edit your selection in the time field.

TIP: Change dates & times using your keyboard

You can also change dates and types by typing the information in the fields instead of using the dropdowns. Use MM/DD/YYYY format for dates and ##:## AM/PM for times.

Entering additional part information

Enter details about the subpoena including a history of actions taken to serve the subpoena and next steps to be taken if further action is required.

Continued from Adding parts to orders or Updating parts.

In the New Part/Edit Part window, enter text or make selections in the **Additional Info** pane:

- **Subpoena For**

  Select what is being requested in the dropdown. (Subpoena For types and default are set in Lists > Parts.)

- **Serve By**

  Select how the legal papers will be served on this location in the dropdown. The default comes from the setting in the location's profile. (Serve By types and default are set in Lists > Locations.)

  NOTE: You must designate the firm for Third Party option

  If you select Third Party as the **Serve By** method, the **Lookup Firm** panel will open automatically and you must select the firm that will serve the location with the subpoena or other legal papers. See Looking up firms.

- ***Serve By Firm**

  Only appears if Third Party is selected in Serve By.

  Click **>**

  - **Lookup Firm** – To change the firm. See Looking up firms.
  - **View Firm** – To view/update the firm. See Updating firms.

- **Serve By Firm Warning**

  Only appears if Third Party is selected in Serve By.

  If there is a warning in the Serve By Firm's listing, it appears here *(uneditable*).

- **Instructions**

  Select a special instruction concerning evidence (e.g., admissible) in the dropdown. (Instructions types and default are set in Lists > Parts.)

- **Depo Date**

  Enter or select date and time of the deposition, either oral or written, in the Date Navigator. See Entering dates & times.

- **Action Type, Date, & Detail**

  If further action is required — such as following up with the custodian about a pickup,

click **Action Date** ▽ **> New Action.** In the **New Action** panel, enter or make selections, then click **Save:**

- ***Action Type** *(required)*– Select the next action for this retrieval effort in the dropdown. (Action Types and default are set in Lists > Parts.)
- ***Action Date** *(required)* – Enter or select the next action date in the Date Navigator.
- **Detail** – Enter information about the follow-up action to be taken.

- **Ordered As**
  If the actual name of the location turns out to be different from what the client ordered, enter the *original* location name the client gave you here.

- **Status Notes**
  Enter a description concerning the current status of this part. Format it, if desired. See Customizing emails, messages & web pages. This text will appear in MR Connect.

  To copy what you entered here to other parts of the same order, see Adding status notes to multiple parts simultaneously.

  TIP: Proofread your status notes
  Because anything written in **Status Notes** can be read by your clients, make a habit of reviewing what you've written here before saving the entry.

- **Remarks**
  Enter comments, details, or other information about the subpoena for internal use only.

Reference

- Order
- Date Navigator
- Lists > Parts
- Lists > Locations
- MR Connect

Step-by-step instructions

- Adding parts to orders
- Updating parts
- Looking up firms
- Entering dates & times
- Customizing emails, messages & web pages
- Adding status notes to multiple parts simultaneously
- Entering general part information
- Scheduling pickups
- Setting up part forms
- Moving work to the next step
- Entering services to be billed
- Entering & updating check request details
- Uploading files to a repository
- Making entries in notes logs

Entering & updating check request details

Enter or update fee check details while you are scheduling a pickup or mailing. Or do them in batches later. You can designate payment by either check or credit card.

Continued from Entering & updating fee check requests in parts, Generating a task list, Entering check requests in batches, Managing check requests, Printing custodian fee checks, or Managing fee checks.

1. In the New Check/Edit Check panel/window's **Order Info** pane, information about the part that payment is requested for is not directly editable. Some information can be updated by clicking next to a field and clicking **Edit** in the resulting View window.

2. In the **Check Info** pane, depending on the function some fields will be hidden or grayed out and uneditable. Enter/select options:

   - **Payment Type**

     - **Check** – Default. For paying the fee with a printed check.
     - **Credit Card** – For paying the fee by credit card.

   - **Credit Card No.**

     Credit Card Payment Type only

     Enter the card number or select one from the dropdown.

   - ***Check Date/*Pay Date**

     Required. Default is today/date part was entered into MR9. To change it, use the= Date Navigator.

   - ***Amount**

     Required. Enter the amount of the custodian fee.

   - **Account No.**

     Account that the amount will be credited to. Default is the Custodian Expenses= account number specified in the business unit assigned to the part's order. (See= Selecting BU financial accounts and Entering general order information.)

   - **Custodian Fee Name**

     Select the type of fee paid for records in the dropdown. (Custodian Fee Names and= their default are set in Lists > Accounting and will appear on invoices with details= on.)

- **Payee Type**

  Firm – For paying a vendor.

  - **Other Location** – If you are paying another location (e.g., ROI handled by).
  - **Same as Part Location** – Default. The custodian.

- ***Payee**

  Required. Works with **Payee Type.** If you selected:

  - **Firm** – Click to find the vendor. See Looking up firms.
  - **Other Location** – Click to find the location. See Looking up locations.

- **Memo**

  Enter text to appear on the check.

- **Void Date**

  In View Check/Edit Check windows only

  If voiding an incorrect check/credit card payment, enter the date the check was voided and enter information about the void in **Remarks.** See Date Navigator.

- **Cleared Date**

  In View Check/Edit Check windows only

  Enter the date of the payment on your bank/credit card statement. See Date Navigator.

- **Invoice No.**

  In View Check/Edit Check windows only

  If the part has been billed, the invoice number appears here. Click to view/update the invoice. See Viewing & sending single invoices.

- **Remarks**

  Information about the check for in-house reference.

3. Click **Save** (in Edit Check) or **Save >**

   - **Save & New:** To enter the check request and continue adding requests.
   - **Save & Close:** When you are finished adding requests.

NOTE: MR9 records which staff entered check requests

When you save a check request, the date and time are recorded and your name is= recorded as the issuer. This information appears in the **Created** field in the check= request's detail window, and appears in the **Issued By** and **Issued** columns in the= Request Checks' and Fee Checks' main grids.

Reference

- Date Navigator
- Lists > Accounting

Step-by-step instructions

- Entering & updating fee check requests in parts
- Generating a task list
- Entering check requests in batches
- Managing check requests
- Printing custodian fee checks
- Selecting BU financial accounts
- Entering general order information
- Looking up firms
- Looking up locations
- Viewing & sending single invoices

Printing envelopes

Print addresses from your MR9 database on a variety of envelope sizes using the universal PDF file format.

Continued from Printing envelopes and labels.

1. In the Envelopes and Labels window, select Envelope in the **Print To** dropdown.
2. In the **Size** dropdown, either:
   - **Leave at the system default.**
   - **Select a different standard envelope size** in the dropdown.
   - **Choose Custom** in the dropdown, then enter the envelope's dimensions in the **Width** and **Height** fields.
3. You can customize where the address prints on the envelope by changing the values in the **Top (inch)** and **Left (inch)** fields under **Printing Position.**
4. Choose a typeface and size for how the address will appear visually in the **Font Name** and **Font Size** dropdowns.
5. Click **Print.** MR9 will generate a PDF file of the envelope(s) and download it to your device.

TIP: Use the Feed Direction guide for printing

The **Feed Direction** graphic shows you the direction to set up your envelopes in your printer for proper printing.

TIP: Customize system-wide envelope defaults

If the default envelope specs are not your most common settings, change any of the defaults in System Preferences > Production > Envelopes to minimize the time spent each time you print out envelopes.

Reference

- PDF
- Adobe Acrobat
- Envelopes preferences

Step-by-step instructions

- Printing envelopes and labels
- Printing PDFs from MR9

Adding general billing information to invoices

After adding services to invoices, populate them with billing information. If using the Bulk Turn In feature, you can add billing information and services in the same window. Then choose invoice messages, upload repository files, and enter notes.

Continued from Adding billing information to invoices or Creating invoices for multiple parts at once.

In the Edit Invoice **General** pane/Bulk Turn In **Invoice** pane, not all fields are editable. Fields you can edit in unposted invoices:

- **Invoice Date**

  MR9 will automatically enter the date when you calculate the invoice (see Getting invoices ready to print). You can change that date, for example to backdate the invoice. See Date Navigator.

- **Original**

  Slide to Yes if this is your O&1 client.

- **COD**

  Defaults to the firm's C.O.D. setting (see Entering additional firm information). Use the slider to override the setting for this order only.

- **Print details on invoice**

  Defaults to the firm's setting (see Entering additional firm information). Use the slider to override the setting for this order only.

- ***Sold To Firm**

  Required. Client ordering services. Click ... **>**

  - **View Firm:** To view/edit firm details. See Updating firms.
  - **Lookup Firm:** To change firms. See Looking up firms.

- ***Sold To Contact**

  Required. Individual at the firm who ordered the services. You can select a different contact at the firm by clicking ▾, then selecting the contact in the dropdown. Or click ... **>**

  - **View Contact:** To view/edit contact details. See Updating contacts.
  - **New Contact:** To add a contact to the firm and select them. See Adding contacts to MR9.

- **Bill To same as Sold To**

  - **If invoices are to be sent to this firm:** Slide to Yes. **Bill To Firm** and **Bill To**

Contact default to the **Sold To Firm** and **Sold To Contact.**

If a different contact at the firm should receive invoices and statements, slide to No and select a different contact from the **Bill To Contact** dropdown. Or click ⋮ **> New Contact** to add a contact to the firm and select them. See Adding contacts to MR9.

- **If invoices are to be sent to a third party:** Leave set to No, and select a different firm and contact in the **Bill To Firm** and **Bill To Contact** fields *(both are required).* See Looking up firms.

- **Bill To Firm**

  Works with **Bill To same as Sold To** set to No. If a third party is paying for this invoice, click or ⋮ **> Lookup Firm** to select the firm. See Looking up firms.

- **Bill To Contact**

  Click ▾ to select the contact at the Bill To Firm who is responsible for paying the invoice. If contact isn't listed, click ⊞ or ⋮ **> New Contact** to create a new contact at the firm (see Adding contacts to MR9).

  IMPORTANT: Invoices require Bill To client

  Whether the Bill To client is the same as the Sold To client or is a third party, the **Bill To Firm** and **Bill To Contact** fields must have entities selected in them before you can calculate invoices.

- ***Billing Rate**

  Bulk Turn In only

  Required. If you want to change the rate table shown, click ⋮ **> Lookup Billing Rate.** If this field is blank, click to select the applicable billing rate table. See Looking up billing rate tables.

  If you want to review the selected billing rate table, click ⋮ **> View Billing Rate.** In the **View Billing Rate** panel, general information about the rate table and all service items in the table appear. If you want to edit the table, see Creating & updating billing rate tables.

- **Invoice Header**

  Bulk Turn In only

  If blank, MR9 generates a default header for the invoices. Select a custom header in the dropdown. Invoice headers are created and saved in **Setup > Invoice Headers.** See Setting up invoice headers.

- **Invoice Message**

  Unlimited character count. Your default invoice message appears. Override for this invoice only by updating/entering the text you want or click to select a different invoice message in the **Lookup Invoice Message** panel. You can also delete the

default if you do not want a message to appear on this invoice. To customize the appearance of the message, see Customizing notes & messages.

Messages and the default are managed in **Setup > Invoice Messages.** See Setting up invoice messages.

TIP: Update multiple invoice messages at once

Instead of updating each invoice's message one at time in the Edit Turn In – [#] window, use **> Set Invoice Messages** to update some or all of the related invoices' messages in a batch. See Selecting invoice messages.

Reference

- Date Navigator
- Sold To vs. Bill To
- COD Invoices
- Lists > Invoice
- Electronic billing
- Notes Logs

Step-by-step instructions

- Generating invoices
- Adding & updating services
- Adding billing information to invoices
- Creating invoices for multiple parts at once
- Getting invoices ready to print
- Entering additional firm information
- Updating firms
- Looking up firms
- Updating contacts
- Adding contacts to MR9
- Calculating & posting invoices
- Looking up billing rate tables
- Creating & updating billing rate tables
- Setting up invoice headers
- Customizing notes & messages
- Setting up invoice messages
- Selecting invoice messages
- Finalizing invoices

Credit Memo

A **credit memo** reduces the balance of an invoice.

Step-by-step instructions

- Issuing credit memos

Selecting BU financial accounts

Designate which accounts MR9 should use for different types of financial transactions involving the business unit. Before designating financial accounts for business units, set up your company's financial accounts in Chart of Accounts.

Continued from Setting up business units or Updating business units.

1. Scroll or jump to the **Accounts** pane of the New BU/Edit BU window.
2. Select the appropriate account number in each account's dropdown to match your general ledger or accounting software. (MR9 comes with a set of default accounts, which you can customize. If you need to edit or set up an account, see Customizing accounts.)

TIP: Set up BUs to match your *QuickBooks*

If you use *QuickBooks* for accounting, you can import your MR9 data directly into your *QuickBooks* using QuickBooks Integrator, eliminating the need to re-key financial data. Before importing MR9 invoices and payments into *QuickBooks,* set up your MR9 business units' accounts to match your *QuickBooks* setup.

IMPORTANT: Set up accounts required for processing credit card fees in MR9

Before you can separate out credit card processing fees in MR9, you must set up 2 accounts in Chart of Accounts:

- Expense-type accounts for **Payment Processing Expenses** and **Surcharge Income.** Suggested account names: Payment Processing Fees and Surcharge Income.
- Other Current Assets-type account for **Undeposited Funds (for Processing Fee).** Because *QuickBooks* already has an Undeposited Funds account, you should name the account that is for processing fees' undeposited funds something different. Suggested account name: Undeposited Processing Fee Funds.

Account Types (Income, Expense, Accounts Receivable, Other Assets, etc.) are set in Lists > Accounting > Account Type.

Reference

- Chart of Accounts
- QuickBooks Integrator
- Processing Fee
- Surcharge
- Lists > Accounting

Step-by-step instructions

- Setting up business units
- Updating business units
- Customizing accounts

Printing letters

When email isn't appropriate for correspondence, you can still have MR9 compose letters automatically with relevant MR9 information — but in an editable, print-friendly format.

Continued from Sending collection letters.

1. In the **Print Letter** panel, your letter appears formatted according to its template and with its MR9 information inserted in a *Word*-like application. Review and edit the letter, if needed. See Creating/updating forms & letters.

   ### NOTE: Customize form letters

   Any edits you make here affect this letter only. To update the letter template or create new ones, see Creating/updating forms & letters.

2. Click **File >**

   - **Print**
     To print the letter using your own printing application and printer.
   - **Export**
     To export the letter. Select an export file type in the **Select Format** popup, then click **Save.**

3. Click **Close.**

Reference

- Form Templates

Step-by-step instructions

- Sending collection letters
- Creating/updating forms & letters

Searching fee checks

Search for issued checks and credit card payments.

1. **Payables > Fee Checks**
2. In the **Search By** pane, no particular search filter is required but you must use at least one of the following filters:

   - **Order No.**

     Enter the entire order number.

   - **Part No.**

     Works with **Order No.** Enter the part number (no need to include leading zeroes) to search for a single part of the order.

   - **Date Type**

     - **Check/Pay Date** – Default. Date check or credit card payment was issued. Use to find all payments issued in the date range entered below.
     - **Clear Date** – Date payment was cleared, i.e., paid by the bank to the payee. Use to find only cleared payments.
     - **Void Date** – Date payment was voided. Use to find only voided checks.

   - **Date From/Date To**

     To choose a date range, see Date Navigator.

   - **Check No./Credit Card No.**

     Enter the complete check or credit card number.

   - **Invoice No.**

     Enter the complete invoice number.

   - **Payee Location**

     The custodian or another location (e.g., ROI handled by). Click . See Looking up locations.

   - **Payee Firm**

     Vendor/firm managing records for a location. Click . See Looking up firms.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click

to restrict search to invoices tied to specific BUs. See Lookup panel.

3. Click . MR9 displays all the payments that meet your search criteria. To:

   - **Reprint checks** – See Reprinting fee checks.
   - **Export/print check register** – Sort the results by the **Check No./Credit Card No.** column to create a check register listing the payments in ascending numerical order. To export and save the results, click and select an export file type. See Exporting & printing results.
   - **View a payment's details** – Most of the issued payment details are listed in the results displayed, but you can click a payment's **Check No./Credit Card No.** hyperlink to see additional details.
   - **Edit a payment's details** – To perform additional functions including correcting the fee application, voiding the payment, and clearing the payment, see Managing fee checks.

Reference

- Fee Check
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up locations
- Looking up firms
- Reprinting fee checks
- Managing fee checks

Reprinting fee checks

Sometimes things go awry when you're printing checks. For example, the paper jams, you run out of toner, or checks were in the tray upside down.

Continued from Searching fee checks.

1. To reprint a check, check its box in the Fee Checks result grid.
2. Click **Clear Check No.**
3. MR9 deletes the check number and removes the check from the results pane so you can reprint the check in Print Checks. See Printing custodian fee checks.

Reference

- Fee Check
- Print Checks

Step-by-step instructions

- Searching fee checks
- Printing custodian fee checks

Importing credits & journal entries into *QuickBooks*

In addition to payments, you can import other types of transactions, such as credits, duplicate payments, refunds, voids, and write-offs (but not debit memos or miscellaneous payments), directly from MR9. However, you must import invoices before you can import these types of transactions since they are applied to invoices in *QuickBooks.* (See Importing invoices into *QuickBooks*.)

1. Launch your *QuickBooks* and have the right company file open.
2. **Tools > QuickBooks Integrator**
3. In the **Search By** pane, specify the following filters:
   - **QuickBooks Data**
     Select Credits/Journal Entries in the dropdown.
   - ***Post Date From/*Post Date To**
     Required. Default is today. Enter the date or date range (up to 7 days) transactions were posted.
4. Click . MR9 lists all of the transactions other than payments that posted in the specified period along with information about their related invoice and client.
5. Check the boxes to select transactions.
6. Choose **Import to QuickBooks.**

IMPORTANT: Always open QuickBooks & company file before importing

Having *QuickBooks* and/or the company file closed when you attempt to connect will drastically increase the amount of time taken when importing data to *QuickBooks*(over 300%). It can also cause errors.

It is possible to connect with these closed, however all requests to the company file must first go through *QuickBooks,* which means *QuickBooks* must be launched in the background for each query. It will always be fastest to connect with *QuickBooks* already running.

Reference

- Results pane

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with MR9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing checks into *QuickBooks*

Editing form Data Fields options

Form Templates' Data Fields options let you insert MR9 data and date fields into your forms. The data fields available to use in a form are contextual — the Form Type and Form Group the form is assigned to determine which data fields you can include in the form. You can also delete fields from forms.

Continued from Creating/updating forms & letters.

Add fields

1. In the New Form/Edit Form window, click **Data Fields.**
2. Click in the form where you want to insert a data field, then select the field from one of the contextualized dropdowns:

   - ### Insert Data Field

     Select an MR9 data field to add to the form where the cursor is.

   - ### Insert Data Table

     In Collection Letters–Invoice List

     1. Select **Selected Invoices,** then in the **Insert Data Table** popup's **Select Data Field** options, check box(es) of entry content to include. You can also:

        - **Customize the field order** by using the up and down arrows to rearrange the order of included fields in the list.
        - **Choose how to display the list of invoices** — either as paragraphs or rows in a table — by clicking the associated radio button. If you choose to display the list as a table, you can also choose to include a table header of the field names by checking the box.

     2. Click **OK** to save your choices, close the popup, and add the invoice list to the form where the cursor is.

   - ### Insert Special Field

     1. Select **Date** to add a date field to the form where the cursor is.
     2. In the **Date Field Options** popup select one of the date/time display options.
     3. Optionally, check the **Preserve formatting during updates** box if you want to keep your modifications through future MR9 updates.
     4. Click **OK** to save your choices, close the popup, and add the date/time field to the form where the cursor is.

- ## Format fields

  To change a field's formatting see Editing form Home options.

  To format an invoice list table, see Editing form Table Tools options.

- ## Delete fields

  Data fields cannot be deleted with the **Delete** or **Backspace** key. To delete a data field:

  - Right-click the data field and select the **Delete Field** option in the popup menu.
  - Select the data field and use the menu bar's **Data Fields > Delete Field** option.

  You can only delete one data field at a time.

NOTE: Form Templates' contextualized dropdowns

Instead of listing every available MR9 data field for you to scroll through, MR9 only displays fields related to the category of form you are updating, logically grouped into sets, so you can quickly find a specific merge field. Which fields are available in a form template depends on which form type the form template is assigned to. See Organizing with form types & groups.

Reference

- Form Types and Groups

Step-by-step instructions

- Creating/updating forms & letters
- Editing form File options
- Editing form Home options
- Editing form Insert options
- Editing form Page Layout options
- Editing form View options
- Editing form Table Tools options
- Editing form Frame Formatting options
- Organizing with form types & groups

BEST PRACTICES: Business Unit ID

Business Unit IDs are limited to a maximum of 10 characters. If you have multiple office locations and each location has multiple business units, you might want to create business unit IDs in a way similar to the following example to keep the IDs brief, yet meaningful:

- **LA-DEP**
  Los Angeles – Deposition
- **LA-VID**
  Los Angeles – Video
- **LA-VC**
  Los Angeles – Videoconferencing
- **OC-IMG**
  Orange County – Scanning and Imaging
- **OC-REF**
  Orange County – Referral Work
- **SD-DEP**
  San Diego – Deposition
- **SF-DEP**
  San Francisco – Deposition
- **SF-VID**
  San Francisco – Video
- **SF-TP**
  San Francisco – Trial Presentation

Setting up repository descriptions

Enter descriptions for the file types you typically upload to MR9 repositories. Then when uploading files to repositories you can save time by selecting the appropriate description from your list instead of entering it from scratch. You can alter the selected text in the Description field, if needed, of an individual file, or revise any canned file description for future use.

1. View existing repository descriptions

1. **Setup > Repository Descriptions**
2. **File Type** defaults to ALL. Click to see all the repository descriptions already entered into MR9. You can restrict the results by clicking and selecting group(s) to search. See Lookup Panel.
3. MR9 displays the results. To:
   - **View a repository description** – Click its **> View** or hyperlinked text.
   - **Edit a repository description** – Click its **> Edit.** Or click **Edit** in its View Repository Description window.
   - **Create a new repository description** – Click **New.**

2. Create/update repository description

1. In the Edit Repository Description/New Repository Description window:
   - **File Type**
     Defaults to the system default or choice previously selected. (System default is selected in Lists > Repository > File Type.) Choose a different group in the dropdown if desired.
   - ***Repository Description**
     Required. Edit or enter the text exactly as you want it to appear in repository description lists.

3. Save repository description

- In Edit Repository Description window, click **Save** to update the description.
- In New Repository Description window, click **Save >**
  - **Save & New:** To save the description and add more.

- **Save & Close:** When you have no more repository descriptions to add.

NOTE: Create repository descriptions on the fly

You can create repository descriptions when uploading files. MR9 will not save those repository descriptions so this is a good option if you only need a repository description one time. See Uploading files to a repository.

TIP: Delete unneeded repository descriptions

When you no longer need one of your custom repository descriptions, delete it to keep your list of repository descriptions managable.

1. To delete a repository description:

   - **From the Repository Descriptions main screen,** find the repository description you want to delete and click its **> Delete.**
   - **In a View Repository Description/Edit Repository Description window**, click **Delete.**

2. Click **Yes** in the popup.

Reference

- Lists > Repository

Step-by-step instructions

- Uploading files to a repository

Branding – Portal preferences

Customize the look and feel of your MR9 login/welcome page.

Continued from Customizing global preferences.

1. Customize contents

- ### General

  ***App Title in Web Browser**

  Required. Enter text that will appear as the browser header for your MR9 Portal page.

- ### Portal Page

  - ***Portal Page Image**

    Required. Image that appears on your login/welcome page.

    1. Before uploading, check that your logo image file conforms to these guidelines:
       - **Logo image format:** PNG
       - **Logo image file size:** File size has a direct impact on loading time of login page. Smaller file size is strongly recommended.
       - **Logo image ratio:** 600 x 480 px (width-to-height)
       - **Logo image transparency:** Transparent image is recommended.
    2. To add your company logo, see Uploading logos for insertion.

  - **Portal Page Description**

    Enter text that will appear on your login/welcome page. To format the text, see Customizing emails, messages, web pages & stamps.

  - ***Contact Button Text**

    Required. Enter label text for a button your clients click on your Portal page to access MR Connect.

  - **Background Color**

    To change the color of your Portal page, see Picking colors in MR9.

2. ## Preview

   MR9 gives you the option to preview your Portal page before people see them.

   - In the **Portal Page** pane, click **> Preview Portal Page** to preview function page customizations.

3. ## Go live

   When you are finished customizing and previewing, click **Save.**

Reference

- MR Connect

Step-by-step instructions

- Customizing global preferences
- Uploading logos for insertion
- Customizing email messages & web pages
- Picking colors in MR9

Contact – My Profile preferences

Designate who is notified when a contact changes information in their profile in MR Connect.

Continued from Customizing global preferences.

To choose which MR9 users are alerted via Notifications and Messages when a contact changes their information in their profile, see Managing users to notify.

Reference

- MR Connect
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Managing users to notify

Lookup panel

Some sub-functions or panes within windows have their own search capability called Lookup. When you click next to a field in MR9, a Lookup panel appears. Depending on the field, the Lookup panel's search function is:

- ## Lookup list

  List of options related to the field. Default is usually ALL. You can select single or multiple items:

  - **Click the Lookup panel's title box** to select all items/clear all checkmarks at once.
  - **Click individual list items' boxes** to select/clear them.

- ## Lookup search filter

  Two-step search function:

  1. ### Search By

     Select a search option in the dropdown.

  2. ### Search Criteria

     Depending on the function, you either:

     - **Enter text in the field** to search for in the database. You must enter at least 3 consecutive characters in a search field. To find all listings, type %%%.
     - **Click in the field,** then select from the dropdown list. Repeat to select more than one filter to search with. Click **X** to delete a filter.

     #### TIP: More search filter info

     For instructions for specific Lookup search filters, see Looking up contacts, Looking up firms, and Looking up locations.

  3. ### Show Active Only

     If this option appears, leave as default Yes to restrict results to active entries only. Or slide to No to show all results that match your search critera.

- ## View results

  1. Click:

     - **OK** in lists.
     - in search filters to see entries that match your search criteria. Then click the hyperlinked choice in the results grid to select it.

2. Back in the **Search By** pane, click to use the search criteria selected in the Lookup panel.

Reference

- Search By pane
- Results pane

Step-by-step instructions

- Searching in MR9
- Looking up contacts
- Looking up firms
- Looking up locations

Sorting rows

The results returned in results pane grids are listed in alphabetical or numeric ascending order of the hyperlinked information in each result. You can sort the information in the data grid by any column or set of columns in either ascending or descending order.

- ### Ascending/descending sort order

  The default sorting column is indicated by ↑ in the header. Click the column header to switch to descending sort order. Indicator changes to ↓ and rows re-sort.

- ### Sort by a different column

  To change which column results are sorted by, click the heading of the column you want to sort the rows by. Click the column header again to toggle the sort order between ascending and descending.

- ### Sort by multiple columns

  To sort rows by multiple columns, click the column you want as the first sort variable, then Ctrl-click (Windows OS) or command-click (Mac OS) to select the second sort variable. MR9 numbers the sort indicators for your reference, for example:

. Repeat to select as many columns to sort by as you wish. To toggle the sorting order of a column within the selected set, click the column header while holding down the Ctrl/command key. To disable multiple column sorting, click any column header.

- ### Save sorting layout

  In most data grids, row sorting will revert to the default settings each time you re-open the function. If a results grid has a button in the bottom right corner, you can save your row sorting preference by clicking **> Save Grid Layout.** See Customizing grids.

Reference

- Results pane

Step-by-step instructions

- Customizing grids

Accessing results

To access an individual result in a results pane, click one of the following in its results row:

- **Hyperlinked text**

  Click the highlighted hyperlinked text in its results row.

- **Shortcuts**

  Use shortcuts to view, edit, delete, or perform other operations:

  Click then select one of the options in the dropdown:

  - **View** – Gives the same result as clicking the hyperlinked text in the row.
  - **Edit** – To open the result directly in its Edit window.
  - **Delete** – To delete the result. In the popup that appears, click **Yes.**

  Other options appear in dropdowns that relate to the specific function being searched. For example in Orders, options for copying orders with or without parts are available as shortcuts.

Reference

- Results pane
- Orders

Search By pane

Most main functions in MR9 include a Search By pane that contains multiple filters to restrict a search.

In most cases, you must set at least one filter in a Search By pane before clicking . Any filters marked with a red asterisk (*) must have an entry.

Search filters:

- **Text-entry fields**

  Blank fields with white backgrounds are data-entry fields that you can enter text into directly to search. You can enter full or partial words to search (minimum of 3 characters).

  NOTE: MR9 finds exact and similar possible text matches

  MR9 uses similarity search logic so search results include entries that are not exact matches of the searched term in addition to any exact matches. For example, if you searched for "Angela Smith" MR9 would include entries such as "Angela J. Smith" and "Angela Wurtsmith" because MR9 compares your search terms to possible words made up of the entered characters and numbers.

  TIP: View all entries in a table

  To view all entries in an MR9 table, enter 3 percentage signs (%%%) in a text field filter for that table.

- **Dropdown lists**

  MR9 displays a default option. Click the field's ▾ to select a different option in the dropdown.

- **Date Navigator**

  Click a date field's to set a date using MR9's perpetual calendar. See Entering dates.

- **Grayed-out fields**

  You cannot type any text in these fields. Instead, click its icon (or) to change the information displayed or to delete it. See **Dropdown lists** above or Lookup panels.

- **Multiple search criteria**

  You can apply search filters either one at a time or in combination with each other.

- **Clear search criteria**

  To clear all search criteria at once, close the function window, then re-open it.

Reference

- Date Navigator
- Lookup panel
- Results pane

Step-by-step instructions

- Searching in MR9
- Entering dates & times

Results pane

When you search for information in MR9, it usually presents the information in the results pane as a grid, divided into horizontal rows and vertical columns.

The first row (bold text on color background) is always the heading row. It contains labels that explain the contents of the columns. If the results include a grand totals line at the bottom of the pane, it also displays with bold text on a color background.

The rest of the results display in rows of alternating background colors (white and gray) for better viewing of separate line data.

A directional arrow appears next to the column header for the variable that the results are being sorted by. The default up arrow indicates the results are listed oldest to newest/smallest to largest.

- **Locked columns**

  In some results panes, the leftmost columns up to the one that contains hyperlinked entries remain visible when scrolling to the right in the results grid. Locked columns are designated by a doubly thick right border.

- **Custom grid layout**

  In some results panes, designated by a button in the bottom right corner, you can:

  - Hide or show any column.
  - Rearrange the column order.
  - Stretch or shrink column widths.
  - Designate which column to sort results by in ascending or descending order.
  - Choose which columns are locked (i.e., you want to always be visible when scrolling through the results).
  - Save your custom grid layout or return to the default layout.

  See Customizing grids.

- **Interactive reports**

  Unlike most results grids in MR9, interactive reports do not look like other grids and are manipulated differently. Interactive reports have initial overviews which you can then drill down into for more details by clicking column and row headers. See Using interactive reports.

- **Record Navigator**

  When the results of a search are too numerous to fit in one page, use the Records

Navigator at the lower left of the results page to locate the record you want.

- **Arrow keys**

  Use ◀ and ▶ to page back and forth through the results.

- **Skip arrow keys**

  Use |◀ and ▶| to go to the first or last page.

- **Items per page**

  Select a number in the dropdown to limit the number of entries displayed per page.

  The lower right side of the pane lists the number of entries in the returned results.

- **Static reports**

  Some information in MR9 is better in a format that is print friendly first, generally information that you are distributing to third parties, such as clients and your accountant. This information is formatted in MR9 as static reports that you can easily distribute either as a printed handout or an emailed PDF. These reports are uneditable and non-adjustable but can be exported in a variety of formats and printed directly from within MR9. See Printing invoices, statements, & reports.

- **Adjust grid**

  In all results panes except interactive reports and static reports, you can sort the grid rows in ascending or desending order and resize column widths to view results better. Adjustments are temporary unless you are adjusting a customizable grid and save the results. See Sorting rows, Resizing columns and Customizing grids.

- **Select results**

  In any results pane with a checkbox column for selecting listings, you can:

  - Check one or more boxes to select them.
  - Check the first box in a series then Shift + Click the last box in the series to select a range of boxes at once.
  - Check the box in the header to select all.
  - Click any checked box to de-select it.

- **Export/print results**

  Any results pane with a or button in the bottom right corner can be exported to save, use in other applications, or print. See Exporting & printing results.

Reference

- Search By pane
- Lookup panel

Step-by-step instructions

- Customizing grids
- Using interactive reports
- Printing invoices, statements, & reports
- Sorting rows
- Resizing columns
- Accessing results
- Exporting & printing results
- Searching in MR9

Resizing columns

You can adjust the width of any column in a data grid. To change a column's width, move the cursor to the divider at the right edge of the column header. The cursor changes to a horizontal double arrow, which you can drag (in either direction) to resize the column.

In most data grids, your column adjustments will revert to their default settings each time you re-open the function. If a results grid has a button in the bottom right corner, you can save your column width adjustments by clicking **> Save Grid Layout.** See Customizing grids.

Reference

- Results pane

Step-by-step instructions

- Customizing grids

Historical data saved in a merge

Not all data is saved when 2 entries are merged. Information that is retained from the merging entry in the remaining entry depends on what data type you are merging. Check this list to see which information is saved when merging business units, service items, list options, firms, contacts, or locations.

- **Business Units**

  Orders associated with the merged BU are moved to the Merge To BU and a note is added in the Merge TO BU's **Remarks** which BU was merged by whom and when. No other information from the merged BU's listing is saved. See Entering additional BU information.

- **Service Items**

  Currently no information from the merging service item is saved.

- **List options**

  If a list option has a Merge To button, the option's historical data is moved to the Merge To option.

- **Firms**

  The merging firm cannot have any email addresses or preferred services. Firm info that will be saved from merged (and deleted) firm:

  - **Orders**
  - **Contacts**
  - **Tags**
  - **Collection Notes**
  - **Repository files**
  - **Notes Log entries**

- **Contacts**

  The merging contact cannot have any email addresses. Contact info that will be saved from merged (and deleted) contact:

  - **Tags**

- **Preferred Services**
- **Anniversaries**
- **Repository files**
- **Notes Log entries**

- **Locations**

  Location info will be saved from merged (and deleted) location:

  - **Tags**
  - **Repository files**
  - **Notes Log entries**

Step-by-step instructions

- Merging data
- Entering additional BU information

FedEx Account for Shipping Labels preferences

Enter FedEx account information into MR9 to print labels and track shipments. You can have multiple FedEx accounts, then select which one you want to use when printing labels.

TIP: FedEx accounts can also mean label templates

If you have multiple shipping label setups that you use regularly, instead of updating the default each time you ship something that needs a different label setup, create accounts/templates for each setup instead. Accounts can share the same credentials, so you can have multiple templates with the same credentials but different shipping label specifications saved as accounts.

Continued from Customizing global preferences.

1. In the **Production – FedEx Accounts for Shipping Labels** panel, any FedEx accounts already entered are listed in the **Account Name** pane. To:
   - **View the settings for a listed account:** Click the account's **> View** or its hyperlinked **Account Name.**
   - **Update the settings for a listed account:** Click the account's **> Edit.** Or click **Edit** in the **View FedEx Account** panel.
   - **Delete a listed account:** Click the account's **> Delete.** Or click **Delete** in the **View FedEx Account** panel. Click **Yes** in the popup window that appears.
   - **Add an account:** Click **New.**
2. In the Edit FedEx Account/New FedEx Account panel, edit or enter a name for the FedEx account in ***Account Name** *(required).*
3. To find the information to enter in the fields in **Edit FedEx Account/New FedEx Account** panel, read How to get FedEx Key information for printing FedEx shipping labels.
4. Follow the instructions to get your company approved to print shipping labels from MR9, then enter the required information here (if you are making a new label template for an existing FedEx account, copy this information from the existing account):
   - **Authentication Method**

     Default is OAuth2 *(uneditable*).
   - ***Account No.**

     Required. Your FedEx account number.

- ***API Key**

  Required. Provided by FedEx.

- ***Secret Key**

  Required. Provided by FedEx.

- **Default**

  Slide to Yes to make this account the primary FedEx account for labels sent from MR9. You can override which account you use when printing an individual label.

5. Continue to follow the instructions in the KB article to set up your label in MR9. (If you are making a new label template for an existing FedEx account, skip this step.)
6. To set default values for your label template in this account, see Setting shipping label specifications.

Reference

- Production
- Shipping

Step-by-step instructions

- Customizing global preferences
- Shipping via FedEx and UPS
- How to get FedEx Key information for printing FedEx shipping labels
- Setting shipping label specifications

UPS Account for Shipping Labels preferences

Enter UPS account information into MR9 to print labels and track shipments. You can have multiple UPS accounts, then select which one you want to use when printing labels.

TIP: UPS accounts can also mean label templates

If you have multiple shipping label setups that you use regularly, instead of updating the default each time you ship something that needs a different label setup, create accounts/templates for each setup instead. Accounts can share the same credentials, so you can have multiple templates with the same credentials but different shipping label specifications saved as accounts.

Continued from Customizing global preferences.

1. In the **Production – UPS Accounts for Shipping Labels** panel, any UPS accounts already entered are listed in the **Account Name** pane. To:
   - **View the settings for a listed account:** Click the account's **> View** or its hyperlinked **Account Name.**
   - **Update the settings for a listed account:** Click the account's **> Edit.** Or click **Edit** in the **View UPS Account** panel.
   - **Delete a listed account:** Click the account's **> Delete.** Or click **Delete** in the **View UPS Account** panel. Click **Yes** in the popup window that appears.
   - **Add an account:** Click **New.**
2. Edit or enter a name for the UPS account in ***Account Name** *(required).* This is the name the account will be identified by in MR9.
3. To find the information to enter in the fields in **Edit UPS Account/New UPS Account** panel, read How to get UPS Access Key for printing UPS shipping labels.
4. Follow the instructions to get your company approved to print shipping labels from MR9, then enter the required information here (if you are making a new label template for an existing UPS account, copy this information from the existing account):
   - **Authentication Method**

     Default is OAuth2 *(uneditable*).
   - ***Account No.**

     Required. Assigned by UPS.
   - ***Client ID**

     Required. Provided by UPS.

- ***Client Secret**

  Required. Provided by UPS.

- **Default**

  Slide to Yes to make this account the primary UPS account for labels sent from MR9. You can override which account you use when printing an individual label.

5. Continue to follow the instructions in the KB article to set up your label in MR9. (If you are making a new label template for an existing UPS account, skip this step.)
6. To set default values for your label template in this account, see Setting shipping label specifications.

Reference

- Production
- Shipping

Step-by-step instructions

- Customizing global preferences
- Shipping via FedEx and UPS
- How to get UPS Access Key for printing UPS shipping labels
- Setting shipping label specifications

Turn In

Turn In is a 2-part process. First, your production staff compiles invoices for all parties ordering services on a part of an order. Then, your billing staff fills in the financials and finalizes the invoices.

Reference

- Parties
- Service items
- Order
- Part

Step-by-step instructions

- Generating invoices
- Searching Turn In
- Creating invoices for multiple parts at once
- Finalizing invoices

Firms

Firms are companies you do business with, such as law firms, or they are a third party that pays you, e.g., an insurance company.

For how to set up lists, see Customizing lists.

- **Account Status**

  Designation specifying the state of accounting affairs or credit standing, e.g., In Collection or COD (Cash on Delivery). Used in collections.

- **Class**

  Designation specifying the quality or ranking of a law firm. Used in marketing.

- **Collection Action Type**

  Designation specifying what action has been taken or should be taken to collect overdue funds from client firms, such as COD Letter Sent or Send Demand Letter.

- **Firm Type**

  Designation specifying industry, e.g., Law Firm or Insurance Company.

- **Notes Type**

  Categories of notes, e.g., Collection or Marketing, for classifying what a firm note documents. Use as a filter when searching Firm Notes Logs.

- **Rating**

  Designation specifying your credit rating of a firm, e.g., No Deposit Required or Bad Debt.

- **Source**

  Designation specifying how the client heard of your company, e.g., promotion or web. Used in marketing.

- **Tag**

  Categories to organize firms. You can use any words or phrases as a tag, e.g., Top 10.

Reference

- Firms

- Notes Log
- Tags

Step-by-step instructions

- Customizing lists
- Adding firms to MR9
- Recording collections efforts
- Entering firm marketing information
- Organizing with tags

Sending text messages from MR9

Send text messages to contact's mobile phones directly from MR9.

1. In the View Contact/Edit Contact window of the contact you want to send a text message to, click next to **Mobile Phone** in the **General** pane. (To find the contact, see Searching contacts.)
2. In the **Send SMS** panel, ***From** *(required)* displays your default email address. See Setting personal preferences.

IMPORTANT: Keep your text messages brief & to the point

When crafting SMS messages in MR9, keep in mind that different carriers have different character limits for text messages (some as short as 67 characters). If your message is too long, it will be truncated and missing important information.

Keep messages as short as possible to ensure that the recipient receives the full text.

Additional points to keep in mind:

- Think of SMS as simply an instant notice and follow up with additional information in an email, which would be more detailed.
- If including a URL that is long, consider using one of the URL shortener services, such as TinyURL, to minimize the characters in a URL link.

Reference

- Contacts

Step-by-step instructions

- Searching contacts
- Setting personal preferences

Managing user's BUs

Enter/update a user's associated business units.

Continued from Creating user accounts or Managing users.

1. In the Edit User window, scroll or jump to the **Business Units** pane.

   - **To add the user to a BU:**

     1. Click .
     2. In the **Add Business Units** panel, all of your MR9 BUs that were not listed in the **Business Units** pane appear. Check the box(es) of BU(s) the user should be associated with.

   - **To delete the user from a BU:**

     1. Check box(es) of the BU(s) you want to remove the user from.
     2. Click .
     3. Click **Yes** in the popup.

2. In the Edit User window, click **Save.**

Reference

- Business units

Step-by-step instructions

- Creating user accounts
- Managing users

Setting up a Clover business account

Before your clients can pay invoices online through MR Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in MR9. Follow these instructions to set up a Clover business account and enter your credentials in MR9.

Continued from Contact – Account Activity preferences.

NOTE: Clover site instructions & wording might be different

These instructions might be slightly different from the actual site, however, the concept is the same. You must set up a business account on Clover and get credentials which you then enter in MR9 before you can accept payments online. For more detailed instructions, see https://docs.clover.com/dev/docs/gdp-create-global-developer-account.

1. SSet up free developer account

1. Go to: https://www.clover.com/global-developer-home/public/create-account
2. Enter the relevant information, then click **Create Account.** A confirmation email will be sent.
3. Click **Confirm your email address** in the confirmation email.
4. On the **Let's finish setting up your account** screen, enter the following additional information:

Field	Value
Developer Account Name	[Your Company Name]
Choose where your integrations will be available	North America

5. Click **Get Started.**
6. In the **Developer Account Created** popup click **Log In,** then enter your email address and password and click **Log In.**
7. In the Setup MFA screen, click **Setup.**
8. In the Select Method screen, click **Authenticator App.** Then follow the instructions for your authenticator app.
9. Click the **Sandbox** switch at the top right of the screen to change to Production mode.

10. Click **Get Approved** and refer to https://docs.clover.com/dev/docs/developer-account-approval to proceed with developer account approval.
11. In the Developer Settings screen, click next to **Account Details.**
12. In the **Edit Account Details** popup, select Business in the **I'm doing business as an** dropdown. Enter the required information, then click **Save.**
13. In the Developer Settings screen, click next to **Identity Verification.**
14. In the **Edit Identity Verification** popup, fill in all fields, then click **Save.**
15. In the Developer Settings screen, click next to **Contact Info.**
16. In the **Edit Contact Info** popup, enter the required information, then click **Save.**
17. Request account approval by clicking **Verify Your Account** at the bottom right of the Developer Settings screen.
18. Refer to https://docs.clover.com/dev/docs/gdp-create-new-app and perform the following tasks to create an app.
19. Click **Create new app** at the top right of the Dashboard home.
20. On the Name your app and pick a country screen, select the app name and the countries your app will be available in, then click **Next.**
21. On the What type of app do you want to create? screen, select **Payment app** and click the **Next.**
22. On the Select a platform screen, check **Web Clients > Web** at the bottom, then click **Create app.**
23. After the app is created, click next to **Requested Permission**s on the App Settings screen.
24. On the **Edit Requested Permissions** popup, check **Payments > Read** and **Ecommerce > Enable online payments,** then click **Save.**
25. On the App Settings screen, click next to **Ecommerce Settings.**

26. On the **Edit Ecommerce settings** popup, select the options as shown below, then click **Save** to complete the app settings.

Field	Value
Integration Type	Hosted iFrame
Use reCAPTCHA for all transactions made through iFrame embedded page.	Uncheck

2. Add a test merchant

1. Refer to https://docs.clover.com/dev/docs/gdp-manage-test-merchants-accounts and do the following to add a test merchant.
2. Click **Test Merchants** on the left side of the Dashboard. A test merchant is created by default, but you'll need to configure options to suit your environment. Click **Add Test Merchant** to create an additional merchant.
3. After entering the merchant information, click the **Create Account.**
4. You can check the merchant you created in the Merchant list.

3. Generate API tokens

1. Refer to https://docs.clover.com/dev/docs/gdp-create-merchant-specific-api-token#view-and-create-a-merchant-specific-api-token to generate API tokens in production mode.
2. In the Test Merchants screen, launch the dashboard by clicking next to the merchant you created.
3. Click at the top right of the Merchant dashboard.
4. In the Settings menu, click **View all settings.**
5. On the View all settings screen, click **Ecommerce > Ecommerce API tokens** at the bottom right.
6. When the **Two Factor Authentication Required** popup appears, click **Enable Two Factor.**
7. On the Ecommerce API Tokens screen, click **Create new token.**

8. In the Create new token pop-up screen, set **Integration type** to Hosted iFrame + API/SDK, then click **Create Token.**
9. Your public and private tokens are generated and displayed on the Ecommerce API Tokens screen along with a **Recaptcha Settings** section. Uncheck **Use reCAPTCHA for all transactions made through iFrame embedded page.**
10. Copy and save both tokens to enter in MR9 Connect Preferences.

4. Enter your credentials in MR9

1. In MR9 go to Connect Preferences > Contact – Account Activity and click **Edit.**
2. Add your credentials to the **Online Payment** pane:
   - **Online Payment Method**
     Select First Data (Clover) in the dropdown.
   - ***Public Token**
     Required. Copy and paste your company's **Public Token** from your Clover account.
   - ***Private Token**
     Required. Copy and paste the **Private Token** from your Clover account.
3. Click **Save.**

Reference

- MR Connect
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- Setting up a PayPal business account
- Setting up an Authorize.net business account
- Setting up a Square business account
- Setting up a Stripe business account

Setting up a Square business account

Before your clients can pay invoices online through MR Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in MR9. Follow these instructions to set up a Square business account and enter your credentials in MR9.

Continued from Contact – Account Activity preferences.

NOTE: Square site instructions & wording might be different

These instructions might be slightly different from the actual site, however, the concept is the same. You must set up a business account on Square and get API credentials which you then enter in MR9 before you can accept payments online.

1. Sign up for a developer account on Square.
2. Go to the Developer Dashboard.
3. Click **Create Your First Application.**
4. Enter a name for your application.
5. Agree to the Square Developer Terms of Service.
6. Click **Create Application**.
7. Click your application to open the application settings pages.
8. Switch the Dashboard from Sandbox to Production.
9. On the Credentials page find your production credentials.
10. In MR9 go to Connect Preferences > Contact – Account Activity and click **Edit.**
11. Add your API credentials to the **Online Payment** pane:
    - **Online Payment Method**
      Select Square in the dropdown.
    - ***Application ID**
      Required. Copy and paste your company's **Application ID** from your Square account.
    - ***Access Token**
      Required. Copy and paste the **OAuth access token** from your Square account.
12. Click **Save.**

Reference

- MR Connect
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- Account Activity preferences
- Setting up a PayPal business account
- Setting up an Authorize.net business account
- Setting up a Payeezy business account
- Setting up a Stripe business account