

Keep track of things in RB8

If you've ever lost time searching for a transcript or an old delivery slip to prove to a client they owe you money, you could benefit from RB8's tracking module. Add this plug-in to your RB8 office management system to monitor jobs as they advance through your production workflow, then keep tabs on them in storage afterwards.

Do you need a system for tracking:

- Transcripts
- Exhibits
- Supporting documents, such as copy order forms and delivery slips
- Media, such as DVDs, video and audio tapes

If so, RB8's tracking module is for you. You define what types of items you want to track, such as transcripts and DVDs. But the module can also cover processes, such as document scanning and video editing, so you have ultimate flexibility in deciding what to track.

Track your company's unique workflow

You designate the production workflow for each type of tracking item — which steps your in-house team goes through preparing, delivering, billing and storing transcripts for instance — and the order in which they should complete those steps.

You can even set up the system to notify individual employees via RB8's Message Center when a step is completed, so people are alerted automatically when it's their turn to handle a job or if someone needs to monitor the process remotely. You tailor the tracking module to cover your firm's entire production process from when a job is turned in to when it's completed and stored.

Customizable tracking system keeps production organized

And if you've ever had a hard time assembling all the miscellaneous charges a job accrues during production onto the job's invoice, here's some peace of mind: With this module, you can enter billable services as you track a job. The charges will automatically appear on RB invoices as miscellaneous charges, so none of them gets overlooked.

Keep track of supporting files & media

As part of tracking, you can electronically archive any kind of file, such as ASCII files, e-transcripts, exhibits, notices and billing sheets, and keep a record of the file's location in the module. For media, such as VHS and audio tapes, DVDs and CDs, you can record their physical location in the module.

When you need to locate a tracked item, you can quickly search your tracking database by:

- witness,
- attorney,
- firm,
- who ordered the job,
- case number,
- caption,
- job date,
- job number,
- internal tracking number or
- storage location.

You can further focus your search by job priority, stage of completion, status (such as on-hold or cancelled) or for a single revenue center in your business.

Generate tracking reports

And if someone else needs to keep tabs on production, you can provide reports on tracked jobs from comprehensive overviews down to detailed logs for a single revenue center, specific date, tracking item or completion status.

Available for a low monthly fee

The tracking module requires the RB8 office management system to operate. You can subscribe to the tracking module for \$50 per month.

For more information about
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