RB9 User Guide

for court reporting & other legal support businesses

version 9.70

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RB9 User Guide

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Getting started

Before using RB9, orient yourself to the system so you can use RB9 efficiently.

- **For all users**

  See Program Basics.

- **For administrators**

  Also see Quick Setup and Complete RB9 setup workflow.

Calendar

Calendar contains all the functions related to your job calendar.

- Cases
- Jobs (List View)
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- Jobs (Weekly View) *(RB9 Standard only)*
- Send Job Confirmations/Cancellations
- Tasks (List View)
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- Job Printout
- Job Analysis
- Tasks in Progress
- Send Overdue Tasks Report
- Assignment Analysis *(RB9 Standard only)*

Reference

- Jobs
- Tasks
- Calendar preferences
- Daily Calendar workflows

Production

Production is where you turn in jobs and prepare them for billing. You generate PDF transcripts with word lists and attached exhibits. Plus ship out produced service items, and track electronic and physical files. You can also produce letters and labels here, and archive and manage files in the central repository.

- Turn In
- Tracking *(RB9 Standard only)*
- Production Sheets
- Envelopes and Labels *(RB9 Standard only)*
- Shipping *(RB9 Standard only)*
- Letters *(RB9 Standard only)*
- Send Originals Out *(RB9 Standard only)*
- Repository
- PDF Transcripts *(RB9 Standard only)*
- Create Master Word List *(RB9 Standard only)*
- Link Exhibits *(RB9 Standard only)*

Reference

- Production preferences
- Production lists
- Production daily procedure

Billing

After turning in jobs and creating invoices, use this module to manage invoices.

- Post Invoices
- COD Invoices
- Send Invoices
- Transfer Invoice
- Export Invoices *(RB9 Standard only)*

Reference

- Billing preferences

Inquiry

Locate information in RB9's database, such as the list of deponents from a case or how much you owe a resource. Plus analyze different aspects of your business, such as a client's invoice history.

- Invoice Inquiry
- Client Activity
- Client Analysis *(RB9 Standard only)*
- Resource Activity
- Resource Analysis *(RB9 Standard only)*
- Witness Inquiry
- Receivable Transaction Inquiry
- Override Resource Pay Inquiry
- Anniversary Inquiry *(RB9 Standard only)*
- Marketing Inquiry *(RB9 Standard only)*

Receivables

Credit and track accounts receivable in RB9; plus assess finance charges, print monthly reports and monitor collection efforts.

- Receive Payments
- Enter Other Transactions
- Send Payment Receipts
- Resource Billings Report *RB9 Standard only*
- Daily Register
- Daily Balance Log *RB9 Standard only*
- Finance Charges
- Monthly Journals
- Aged A/R
- Send Statements
- Client Account Activity *RB9 Standard only*
- Paid Invoices *RB9 Standard only*
- Voided Invoices *RB9 Standard only*
- Collection Letters *RB9 Standard only*
- Collection Follow-up *RB9 Standard only*
- Collection Forecast *RB9 Standard only*

Reference

- Accounts receivable
- Receivables preferences
- Monthly reports at a glance

Payables

Payables in RB9 are the amounts you owe your resources for goods and services they provide for your business. Use this function to handle payroll tasks.

- Override Resource Pay
- Pay Adjustments
- Pay Resources
- Send Resources Pay Statements
- Print Checks *(RB9 Standard only)*
- 1099 Pay Detail *(RB9 Standard only)*
- Print 1099 Forms *(RB9 Standard only)*
- Sales Commission Report *(RB9 Standard only)*
- Override Sales Commission *(RB9 Standard only)*
- Additional Resource Production Report *(RB9 Standard only)*
- Total Payable Report
- Sales Tax *(RB9 Standard only)*
- Liability Balance Log *(RB9 Standard only)*
- Reward Points Summary *(RB9 Standard only)*
- Reward Points History *(RB9 Standard only)*
- Reward Points Analysis *(RB9 Standard only)*

Reference

- Payables preferences

Reports

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

- Business Analysis *(RB9 Standard only)*
- Gross Profit *(RB9 Standard only)*
- Misc. Sales *(RB9 Standard only)*
- Client Rating Report *(RB9 Standard only)*
- Insurance Billing *(RB9 Standard only)*
- Resource Production *(RB9 Standard only)*
- Original Page Production *(RB9 Standard only)*
- Task Turnaround Analysis *(RB9 Standard only)*
- Daily Tracking Summary *(RB9 Standard only)*
- Tracking Productivity Analysis *(RB9 Standard only)*

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 *RB9 Standard only*
- Form Templates
- Label Templates *RB9 Standard only*
- Notes Templates *RB9 Standard only*
- Notes Finder *RB9 Standard only*
- Repository Download Log *RB9 Standard only*
- Download Backup File *RB9 Standard only*
- Email Log *RB9 Standard only*
- Merge History *RB9 Standard only*
- Query Maker *RB9 Standard only*
- QuickBooks Integrator *RB9 Standard only*
- Send Invitations for Signature Proxy *RB9 Standard only*
- Signature Proxy Usage *RB9 Standard only*
- RB Network

Reference

- Tools preferences

Entities

Entities in RB9 are individuals, businesses, places, or discrete parts of your company, such as revenue centers or branch offices.

- Firms
- Contacts
- Resources
- Locations
- Business Units

Reference

- Firms lists
- Contacts lists
- Resources lists
- Locations lists
- Entities preferences

Step-by-step instructions

- Adding firms to RB9
- Updating firms
- Adding contacts to RB9
- Updating contacts
- Adding resources to RB9
- Updating resources
- Adding locations to RB9
- Updating locations
- Setting up business units
- Updating business units
- Removing entities

Setup

Setup contains functions for customizing RB9 to your business. You can run your business using the setup defaults that RB9 includes. Or edit them, delete any you don't need, and add your own options to tailor RB9 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
- Rush Type Master
- Billing Rates
- Pay Rates
- Billing Sets
- Pay Dates
- Invoice Headers
- Invoice Messages
- States
- Tracking Steps *(RB9 Standard only)*
- PDF Transcript Preferences *(RB9 Standard only)*
- PDF Transcript Stamps *(RB9 Standard only)*
- Link Exhibits Patterns *(RB9 Standard only)*
- Exhibit Stamps *(RB9 Standard only)*
- System Preferences

NOTE: Set up BUs first
Before you can use RB9, you must have at least one business unit (BU) set up for processing receivables. See Business Units.

Reference

- Business Units
- Complete RB9 setup workflow
- Accounts receivable

Connect

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

- Send Invitations *(RB9 Standard only)*
- Transcript Ordered *(RB9 Standard only)*
- Publish COD Invoices *(RB9 Standard only)*
- Fulfill Points Redemption Orders *(RB9 Standard only)*
- Transcript Packages *(RB9 Standard only)*
- Create Full-Text Search *(RB9 Standard only)*
- Approve Time-Off *(RB9 Standard only)*
- Billing Sheets *(RB9 Standard only)*
- Activity Log *(RB9 Standard only)*
- Support Tickets *(RB9 Standard only)*
- Connect Preferences *(RB9 Standard only)*

RB9 personal options

Click your name at the top-right of the screen to access RB9'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

Appendices

This information includes a basic orientation to accounting principles and descriptions of what each RB9 report covers.

- Accounting basics
- Monthly reports at a glance

Program Basics

RB9 is an application that works within a browser on your desktop, laptop, or tablet. Information you store and access through RB9 resides on RB9 servers in the cloud. There is nothing to install on your own hardware.

RB9 comes in 2 editions: The Standard edition is the full RB9 system. RB9 Lite is an abbreviated version that concentrates on basic scheduling and business functions.

Familiarize yourself with these RB9 basics first:

- Log in
- RB9 Interface
- Help
- RB9 personal options
- Quick Setup
- Complete Setup

NOTE: Automatic time-out
RB9 automatically times out after a preset amount of time. Online timeouts are required for security reasons. RB9 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.**

Quick Setup

RB9 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 just want to get started quickly, you only need to set up one thing first: Your company's Business Units (BU).

IMPORTANT: One required set-up item
Before using RB9, you must set up at least one BU.

Reference

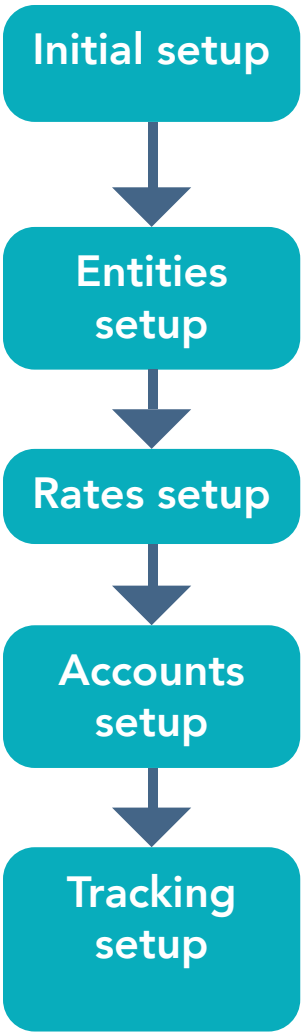
- Business Units
- Complete RB9 Setup workflow
- Modules & functions
- Program Basics

Step-by-step instructions

- Setting up business units

Complete RB9 setup workflow

When you want to set up your RB9 system, follow these workflows to make sure nothing is overlooked. Or set up individual aspects of your RB9 system as needed.



While you can start using RB9 after designating a single business unit and using the pre-set defaults, you can also start customizing RB9 to your company by following this workflow.

After setting up basics, or at any time, set up entities: your client firms, contacts at these firms, resources, and locations by following this workflow.

After setting up basics and entities, set up billing and pay rates, and related information by following this workflow.

RB9 has a default set of accounts, called Chart of Accounts, for tracking financial transactions. You can use the set as is, or customize to match your business and for using with *QuickBooks*.

If you want to use the Tracking module to monitor the status of ordered service items as they move through your production workflow, customize the module to fit into your production process.

Reference

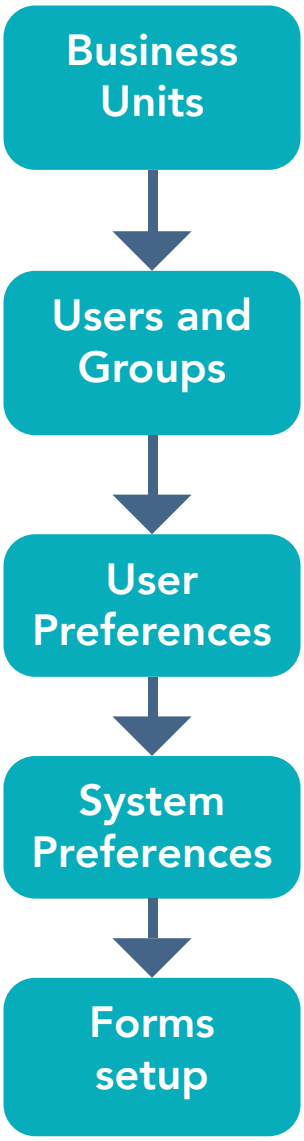
- Initial setup workflow
- Entities
- Entities setup workflow
- Rates setup workflow
- Chart of Accounts
- Tracking setup workflow

Step-by-step instructions

- Customizing accounts

Initial setup workflow

While you can start using RB9 after designating a single business unit and using the pre-set defaults, you can also start customizing RB9 to your company by following this workflow:



Business Units 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. *(in Entities menu)*

To access RB9, you need a **User Account**. In addition to program access, your user account authorizes what actions you can perform in RB9. The permissions for these actions come from which Security Group(s) you belong to. *(in Setup menu)*

User Preferences is where you set the options for your RB9 system. It contains all of the preference settings that affect all users. *(in Personal menu)*

System Preferences is where you set the options for your RB9 system. It contains all of the preference settings that affect all users. *(in Setup menu)*

RB9 comes with a complete set of forms and letters you can use as is. Or use the **Form Templates** function to customize or add to the default set so you can document and communicate through RB9. *(in Tools menu)*

NEXT: Set up entities

After setting up these basics, or at any time, set up entities: your client firms, contacts at these firms, resources, and locations.

Reference

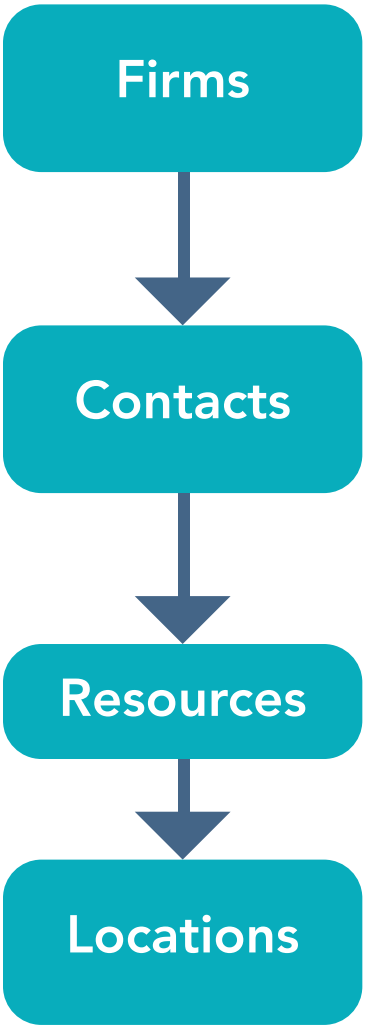
- Business Units
- Entities
- Users and Groups
- Users
- Groups
- Setup
- System Preferences
- User Preferences
- Personal
- Form Templates
- Entities setup workflow

Step-by-step instructions

- Setting up business units
- Creating user accounts
- Managing groups
- Customizing global preferences
- Setting personal preferences

Entities setup workflow

After setting up basics, set up entities: your client firms, contacts at these firms, your company's resources, and locations where jobs occur. You can set these up at any time and in any order, however, every contact must be associated with a firm.



Firms are entities with whom you do business. The Firms table is your address book and information file on all of these entities. *(in Entities menu)*

Contacts are individuals who work for firms you do business with. The Contacts table is where data on all of these individuals is stored. *(in Entities menu)*

Resources provide your business with a service or support. *(in Entities menu)*

Locations are places where jobs take place, such as court rooms or law offices. *(in Entities menu)*

NEXT: Set up rates

After setting up basics and entities, set up billing and pay rates, and related information.

Reference

- Entities
- Firms
- Contacts
- Resources
- Locations
- Rates setup workflow

Step-by-step instructions

- Adding firms to RB9
- Adding contacts to RB9
- Adding resources to RB9
- Adding locations to RB9

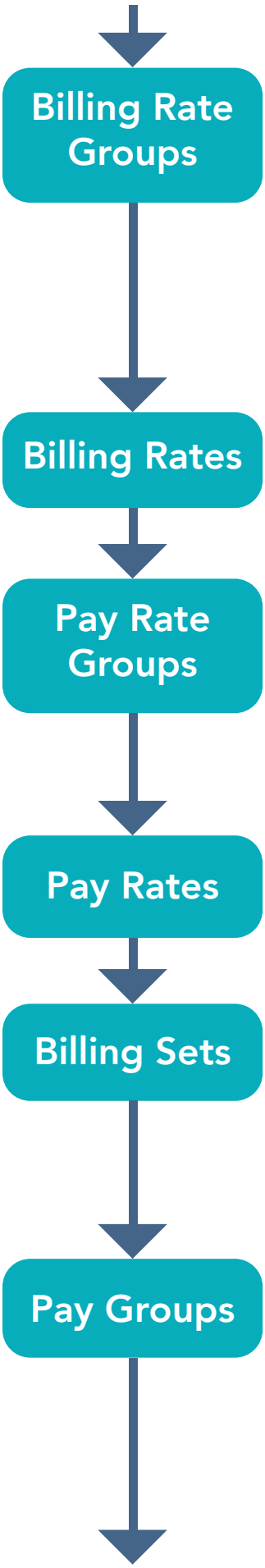
Rates setup workflow

After setting up basics and entities, set up billing and pay rates, and related information by following this workflow:

Set up basic categories **(Subgroups)** of miscellaneous billable services (service items), such as Exhibit and Video. In the next step, enter your service items into these categories (such as Copies and Bates Stamping into Exhibit). 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. *(in Setup menu)*

RB9 organizes service items into a set of categories, called the **Service Item Master List**, where you can add/delete service items, and set default billing and pay information for individual service items. *(in Setup menu)*

Enter your company's expedited (rush) delivery services along with their default billing and pay information into the **Rush Type Master**. Instead of setting up billing rate tables for rush charge choices, use the Rush Type Master to set increases of your base rates for different expedited deliveries. This drastically reduces the number of billing rate tables you will need to set up. *(in Setup menu)*



Set up **Billing Rate Groups**, basic categories of billing rates, such as Standard, Preferred, and specific cases. Billing Rate Groups are similar to Service Subgroups. *(in Setup > Lists > Accounting menu)*

Once you have Billing Rate Groups set up, you can attach contacts, firms, and parties.

For each billing rate group, create as many **billing rate tables** as you need. *(in Setup menu)*

Set up basic categories of pay rates, such as experience levels and affiliate agencies. **Pay Rate Groups** are similar to Billing Rate Groups. A resource must be connected to a pay rate group. (in *Setup > Lists > Accounting* menu)

For each pay rate group, create as many pay rate tables as you need. *(in Setup menu)*

Billing Sets contain service items that are usually billed together. They will speed up your billing process because instead of selecting items one at a time, you choose one of your preset groups of items. *(in Setup menu)*

If resources have different pay dates and cutoff dates, group them according to their pay period (frequency). These **Pay Groups** are unrelated to Pay Rate Groups, which classify resources according to their pay tier. *(in Setup > Lists > Resources menu)*

After setting up Pay Groups and at the beginning of each year, set up **pay dates** for each pay group. *(in Setup menu)*

RB9 automatically generates a standard **invoice header** for each witness 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. *(in Setup menu)*

You can create and group invoice messages in a similar way to invoice headers (above), which can then be selected and modified on individual invoices. *(in Setup menu)*

NEXT: Set up accounting defaults

After setting up rates and related information, customize RB9's Chart of Accounts.

Reference

- Service Item Subgroups
- Service Items
- Setup
- Service Items Master
- Rush Type Master
- Billing Rate Groups
- Setup > Lists > Accounting
- Billing Rates
- Pay Rate Groups
- Pay Rates
- Billing Sets

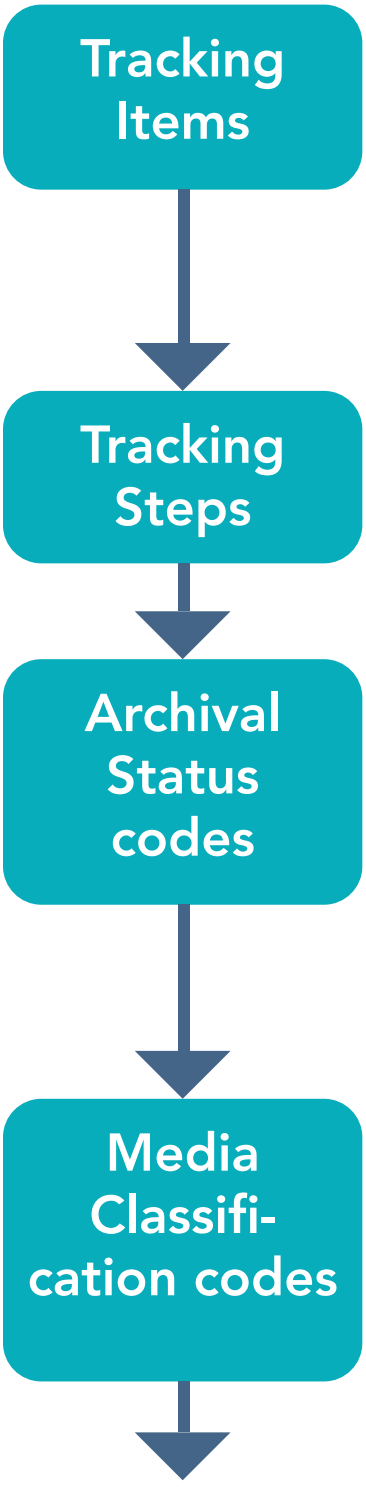
- Pay Dates
- Cutoff Date
- Pay Groups
- Invoice Headers
- Invoice Messages

Step-by-step instructions

- Organizing service items
- Adding service items
- Setting up rush charge types
- Customizing lists
- Entering contact marketing information
- Entering firm marketing information
- Entering party billing information
- Setting up billing rates
- Entering pay information
- Setting up pay rates
- Setting up billing sets
- Setting up pay dates
- Setting up invoice headers
- Setting up invoice messages

Tracking setup workflow

Set up tracking to monitor jobs as they move through your production workflow.

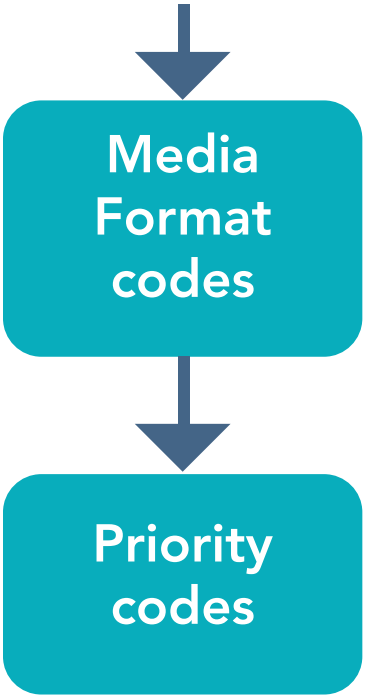


The first set-up task is to create categories of service items that your office produces and wants to track. Typical tracking item types for court reporting and video production firms are DVD, Editing, Exhibit, Scanning, Synching, and Transcript. *(In Setup > Lists Tracking menu)*

After setting up items to be tracked, create **steps** that each item goes through in the production workflow. *(In Setup menu)*

Before starting to track work, specify codes for different areas in tracking. The first set of these codes, **Archival Status,** describes the current archival status of original media, such as video tapes. Typical entries are Archived Here, Originals Destroyed, Originals Sent To, and Pending. *(In Setup > Lists > Tracking menu)*

The next set of codes to add deals with media classification. Typical **media classification codes** are Attorney's Eyes Only, Confidential, Highly Confidential, Restricted, and Under Protective Order. *(In Setup > Lists > Tracking menu)*



The next set of codes to add deals with media format. Typical **media format codes** are Audio Tape, CD, DV-CAM, DVD-R, Hi-8, MiniDV, S-VHS, and Tape. *(In Setup > Lists > Tracking menu)*

The final set-up task is to add **priority codes.** Typical priority codes are High, Normal, and Urgent. *(In Setup > Lists > Tracking menu)*

Reference

- Tracking
- Lists > Tracking
- Setup > Tracking Steps

Step-by-step instructions

- Customizing lists
- Defining tracking steps

Log in

RB9 is a secure website that follows general security rules for business applications. Access to RB9 is through your company's RB9 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 RB9, contact your system administrator.

RB9 is optimized to work in all of the common browsers in the following order:

Step-by-step instructions

- Logging into RB9
- Setting your password at log-in
- Verifying your device

RB9 Interface

RB9 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

Help

Access the full RB9 manual, training videos, KnowledgeBase, live support, support tickets, product suggestions, and basic RB9 info.

- User Guide
- Online Training
- Update History
- FAQ/KnowledgeBase
- Online Support: Team Viewer
- 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.

Cases

RB9 is a case-based system. Individual depos and other services that relate to the case are called jobs in RB9.

NOTE: Some information is shared between cases & jobs

Information entered under a case, such as the parties involved and the services each requests, automatically fills into the relevant fields in jobs linked to that case. Case repository files and notes logs are not shared with their linked jobs.

Reference

- Case
- Jobs
- Parties
- Cases lists

Step-by-step instructions

- Setting up cases
- Searching cases
- Looking up cases
- Scheduling jobs
- Creating jobs in bulk
- Changing case or job status

Jobs (List View)

List View displays your job calendar in a customizable results grid. List View shows the most information about jobs in the results, includes shortcuts to popular operations, and has the most search criteria so you can narrow results further.

You can also view jobs in a week-at-a-glance format or month-by-month calendar.

Reference

- Jobs
- Jobs (Weekly View)
- Jobs (Monthly View)

Step-by-step instructions

- Viewing job calendar as a list
- Searching jobs
- Customizing grids
- Scheduling jobs
- Canceling jobs

Jobs (Monthly View)

Monthly View displays a month's worth of jobs at once in a calendar-page format.

You can also view jobs in a week-at-a-glance or list format.

Reference

- Jobs
- Jobs (List View)
- Jobs (Weekly View)

Step-by-step instructions

- Viewing monthly job calendars
- Searching jobs
- Scheduling jobs
- Canceling jobs

Jobs (Weekly View)

RB9 Standard only

Weekly View displays a week's worth of jobs at once in a week-by-week format.

You can also view jobs in a month-at-a-glance or list format.

Reference

- Jobs
- Jobs (List View)
- Jobs (Monthly View)

Step-by-step instructions

- Viewing job calendar week by week
- Searching jobs
- Scheduling jobs
- Canceling jobs

Send Job Confirmations/Cancellations

When setting a job, get confirmation from the client that this is what they want. You can send notices for jobs as you create or cancel them, but if you deal with a volume of jobs every day or if it is your practice to confirm jobs the day before they are scheduled to take place, save time by sending batch confirmation or cancellation emails. You can also track the confirmation status of individual jobs here.

Step-by-step instructions

- Sending job confirmations or cancellations
- Confirming jobs
- Confirming single jobs
- Canceling jobs

Tasks (List View)

After adding tasks to jobs, monitor tasks to see if they have been designated, assigned, and acknowledged. **List View** displays your tasks in a customizable results grid.

If you need to make any changes, such as adding an overlooked task to a job or assigning a resource to a task, you can do that here.

Reference

- Task
- Jobs
- Tasks (Monthly View)
- Jobs (Monthly View)

Step-by-step instructions

- Entering tasks
- Searching task assignments
- Monitoring & managing task assignments
- Customizing lists

Tasks (Monthly View)

Similar to Jobs (Monthly View), services requested — AKA job tasks — can be viewed as items on a calendar page instead of in a list. If you need to make any changes, such as adding an overlooked task to a job or assigning a resource to a task, you can do that here.

Reference

- Task
- Jobs
- Jobs (Monthly View)
- Tasks (List View)

Step-by-step instructions

- Viewing monthly task calendars
- Entering tasks
- Monitoring & managing task assignments
- Customizing lists

Resource Availability

Resources' work schedules (i.e., their availabilities) are generated by the system using the work schedule set up for each resource. (See Setting work schedules.) However, you can update resources' availabilities manually per day to handle exceptions, such as when someone is going on vacation and requests time off.

Step-by-step instructions

- Managing resources' availability
- Setting work schedules

Quick Assignments

RB9 Standard only

If you prefer to assign all of a day's resources at one time, use Quick Assignments. For example, if there are too many jobs or too many changes in a day to assign tasks one at a time within each job, save time by printing out your upcoming calendar with Job Printout, writing your resources on your calendar, then using Quick Assignments to apply your assignments to your job calendar in RB9. You can also use Quick Assignments to record which resource handled a task after the job occurred.

Reference

- Job Printout

Step-by-step instructions

- Printing job calendar back-ups
- Quickly assigning for high volume of jobs
- Assigning and pre-assigning resources

Resource Blast

RB9 Standard only

Use **Resource Blast** to send email and text-message blasts about last-minute jobs to reporters and other resources instantly.

Step-by-step instructions

- Sending urgent requests for help

Send Assignment Notifications/Cancellations

Instead of notifying resources of assignments as soon as you assign them, do it in batches if you have too many notices to send individually on a daily basis. You can also notify resources of cancellations the same way.

Step-by-step instructions

- Sending batch assignment notifications/cancellations

Daily Calendar Audit

Quickly see how many jobs been scheduled or canceled today or for any date range. You can also use RB9's Daily Calendar Audit to review new entries for typos and other mistakes.

Step-by-step instructions

- Auditing new and canceled jobs

Send Future Calendar

RB9 Standard only

Do you have clients who are working on cases involving many witnesses (including experts)? It’s not hard to imagine how much hassle your clients are going through to keep their calendars up to date with all of the changes taking place on a daily basis. Be a hero. Send clients their job calendars by email with virtually no effort on your part.

Reference

- Case

Step-by-step instructions

- Sending clients their job calendars

Job Printout

Job Printout is a report of all of the jobs scheduled for a specified date range. It includes details about each job including time, status, ordering client, witness, case, location, and business unit. Optionally, it can include scheduling, job confirmation, and assignment notification notes, as well as task details.

TIP: Make back-ups of your job calendar

Use this function to easily see your daily job calendar, or set it for some other date range (for example, if you like to have a hard copy of your future calendar). You can export and/or print a back-up of the job calendar for any date range.

TIP: Assign resources using pencil & paper

Use the printout to assign resources to tasks by writing them on the printout, then refer to it to assign resources in RB9 fast using Quick Assignments *(RB9 Standard only)*.

Reference

- Quick Assignments

Step-by-step instructions

- Printing job calendar back-ups

Job Analysis

RB9 Standard only

Job Analysis reports show new and canceled jobs in the calendar by firm, broken down by contact, so you can see how many calendar settings you are getting from each client.

TIP: Qualify clients by how many jobs 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 jobs they didn't initiate.

Step-by-step instructions

- Knowing who is calling

Tasks In Progress

Tasks in Progress lists the backlog of tasks resources are working on, grouped by resource, in chronological order with the oldest first.

TIP: Monitor & manage how busy resources are

Use the Tasks in Progress function to analyze resources' workloads, either a single resource or all resources at a time. Group tasks by additional/different criteria to break down information on different levels. Plus update individual tasks' statuses and information.

Reference

- Tasks

Step-by-step instructions

- Analyzing resources' workloads

Send Overdue Tasks Report

In addition to monitoring the backlog of tasks resources are working on with the Tasks in Progress function, you can give each resource their own prioritized To-Do list of outstanding tasks with the Send Overdue Tasks Report. This report lists the tasks that resources have missed their deadlines on, in chronological order, which you email directly from this function.

Reference

- Tasks in Progress

Step-by-step instructions

- Sending overdue task reminders

Assignment Analysis

RB9 Standard only

Do you have resources who are complaining about not getting enough good assignments? If you have a big case with many daily copies, how do you evenly distribute the lucrative work among your staff resources? Use the interactive Assignment Analysis report to see how often each resource has been assigned.

Step-by-step instructions

- Analyzing job assignments by resource

Jobs

In most instances, a **job** in RB9 is the reporting of a deposition.

TIP: Categorize jobs to fit your business

Your clients might have different definitions of what a job is, such as realtime, videoconferencing, or read & sign. You might also have further distinctions, such as conference room or document production only, to categorize jobs. A default list of job types is included in RB9 that you can customize to fit your business.

NOTE: 3 ways to view your job calendar

You can choose to view your scheduled jobs as a week-at-a-glance calendar *(RB9 Standard only)*, monthly calendar, or in a list.

NOTE: Cases consist of a series of jobs

Jobs can be set up as single depositions, 2 linked jobs (commonly used for videotaped depositions), a series of jobs at once, or part of an ongoing case.

Reference

- Jobs lists
- Linked Jobs
- Case
- Jobs (List View)
- Jobs (Monthly View)
- Jobs (Weekly View)

Step-by-step instructions

- Viewing job calendars
- Scheduling jobs
- Updating jobs
- Creating linked jobs
- Creating jobs in bulk
- Adding jobs to cases
- Canceling jobs

Task

A **task** is a part of a job that requires a **separate** resource (person, company, thing) to accomplish.

TIP: What qualifies as a task?
In general, tasks are work that is performed outside your office by other parties. Work performed in-house is usually not considered tasks in RB9.

Task examples

- **Reporting**
- **Videotaping**
- **Interpreting**
- **Conference Room-Inhouse**
- **Conference Room-Outside**
- **Catering**

Non-task examples

- **Creating condensed transcripts**
- **Shipping out finished product**
- **Doing other production work**
- **Compiling invoices**
- **Billing clients**
- **Following up on outstanding amounts due**

Tasks simplify & speed up job scheduling, while reducing errors:

- If the job is canceled, all of the tasks are canceled too. When changing a time, date, or location for a job, all related tasks are updated.
- If a job includes multiple tasks and the client cancels one aspect — for example, they no longer need interpreting, but the rest of the job is a go — you cancel only the one task; it doesn't affect the rest of the job.

- Canceling a task adds the assigned resource back to your available resources list for new assignments. And automatically prompts you to send an Assignment Cancellation notice to the resource.
- RB9 keeps track of when tasks were canceled. This is helpful in situations where there is a cost incurred in late cancellations, such as a hotel's conference room, you will have a paper trail to back up any cancellation fees charged to your client.

Reference

- Tasks
- Job
- Jobs lists
- Tasks (List View)
- Tasks (Monthly View)

Step-by-step instructions

- Entering tasks
- Monitoring task assignments
- Sending individual assignment notifications
- Sending batch assignment notifications/cancellations

Calendar preferences

System-wide preferences and defaults for Calendar functions.

- **Assignment Cancellation**

  Options and content for emails and text messages that notify resources of assignment cancellations.

- **Assignment Notification**

  Options and content for emails, text messages, and iCalendar attachments that notify resources of assignments.

- **Default Job Status**

  Options that appear in job status drop-downs.

- **Future Calendar**

  Options and content for emails to clients of their upcoming schedule.

- **Holidays**

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

- **Job Cancellation**

  Options and content for emails to clients confirming job cancellations.

- **Job Confirmation**

  Options and content for emails and iCalendar attachments to clients confirming jobs.

- **Job Status Automation**

  Defaults for automatic job status updates.

- **Job Status Color**

  Defaults for job status color coding.

- **Jobs (Monthly View)**

  Defaults for month-at-a-glance job calendars.

- **Jobs (Weekly View)** *(RB9 Standard only)*

  Defaults for week-by-week job calendars.

- **New Job**

  Defaults for new job settings.

- **Overdue Tasks Report**

  Options and content for emails that notify resources of overdue tasks.

- **Resource Blast** *(RB9 Standard only)*

  Options and content for emails and text messages that notify resources of immediate job opportunities.

- **Tasks (Monthly View)**

  Defaults for month-at-a-glance task calendars.

- **Time Zone**

  Time zones included in **Time Zone** drop-downs.

- **Zoom**

  Defaults for online meetings using the Zoom app.

Reference

- Calendar
- Jobs
- Tasks

Step-by-step instructions

- Customizing global preferences

Turn In

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

TIP: Create RB-PDF Transcripts in Turn In

If you do not have resources upload ASCIIs through RB Connect, you can make RB-PDF Transcripts from ASCII files uploaded in Turn In instead of using the separate PDF Transcript function.

Reference

- Parties
- Service items
- Jobs
- RB Connect
- PDF Transcript

Step-by-step instructions

- Generating invoices
- Finalizing invoices

Tracking

RB9 Standard only

Use **Tracking** to monitor jobs as they move through your production workflow, including the location of physical media, such as DVDs.

NOTE: Tracking is optional & independent from other modules

Tracking is not tied to other modules in RB9, i.e., item tracking is not initiated from jobs or Turn In. It is optional; but if you have different people handling a service item from start to finish and/or many service items to produce, use Tracking to ensure nothing slips through the cracks.

You must first customize the module to fit into your workflow, then you can track transcripts, exhibits, video, etc., so you always know their current status. You can also produce reports to document your process.

Reference

- Tracking setup workflow
- Tracking lists
- Tracking Steps
- Daily Tracking Summary
- Tracking Productivity Analysis

Step-by-step instructions

- Customizing lists
- Defining tracking steps
- Starting new tracking
- Monitoring production

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

RB9 Standard only

Print addresses on a variety of labels and envelopes for parties, contacts, firms, locations, or resources using information from RB9's database. Or create labels and envelopes manually for one-off printing. Use RB9 default label and envelope layouts or create your own custom layouts.

Reference

- Label templates
- DYMO

Step-by-step instructions

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

Shipping

RB9 Standard only

Print FedEx and UPS labels, then track the shipments. You can also use this function keep track of when and via what other methods you sent jobs out, and update the job status of any shipped job.

Step-by-step instructions

- Shipping to clients
- Searching shipping
- Tracking shipments

Letters

RB9 Standard only

Use RB9’s extensive variety of form letters to streamline your correspondence to contacts, witnesses, and others, with relevant details filled in by RB9.

Step-by-step instructions

- Sending letters

Send Originals Out

RB9 Standard only

Track the location of original transcripts, affidavits, and errata sheets, plus keep detailed notes about where and when you sent them and when they were returned.

Step-by-step instructions

- Tracking original transcripts

Repository

RB9 has multiple **repositories** where you store files for safe-keeping and quick retrieval. If you have RB Connect, you can give clients and/or resources 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 RB Connect
Case	Case	• Pre-discovery documents • Case word list	• Any contact listed in the Case Parties pane with the **Allow case-level repository access** box checked • Any resource assigned to any job belonging to the case
Job	Jobs	• Notices • Errata Sheets • Copy Order Forms	• Any contact listed in the Job Parties pane with the **Allow job-level repository access** box checked • Scheduling contact
Task	Tasks	• Exhibits • Video instructions • Master Word Lists	• Any resource assigned to the job
Witness	Turn-in	• Transcripts • Exhibits • Reporter's bill • Depo videos/audio files	• Any contact who is ordering for the witness • Any contact listed in the Job Parties pane with the **Allow witness-level repository access** box checked (3rd party access) • Any resource assigned to the witness

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
Resource	Resources	Contracts	The resource
All-Resources	Repository	• Files not related to a particular job, case, etc. • Blank billing sheet	All resources
Location	Location	For hospitals and doctors' offices, Patient Authorization Forms	Do not publish (for office use only)

Reference

- RB Connect
- Cases
- Jobs
- Tasks
- Witness
- Sold To
- Firm
- Contact
- Resource
- Location

Step-by-step instructions

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

PDF Transcripts

RB9 Standard only

You can generate RB-PDF Transcripts from "page image" ASCII files or any ASCII file which includes line numbers, page numbers and page breaks, as generated by most CAT systems and word processing applications.

Reference

- RB-PDF Transcripts
- ASCII
- PDF Transcript Preferences

Step-by-step instructions

- Creating PDF transcripts
- Setting global RB-PDF Transcript preferences

Create Master Word List

With RB9's **Create Master Word List,** you can create a single word list spanning multiple transcripts belonging to a case. When assigning reporters to jobs on on-going cases, give them a master word list instead of access to all of the previous transcripts for their preparation. It's more convenient for them, and you avoid any potential problems with full access.

TIP: Let reporters create their own master word lists

If you have RB Connect, your reporters can create their own master word lists for cases they are assigned to. They can select case files (without accessing them) to include, choose options for how the word list will look, then click a button to generate their own master word list.

Reference

- RB-PDF Transcripts
- Word List
- Master Word List

Step-by-step instructions

- Creating master word lists

Link Exhibits

RB9 Standard only

Instead of delivering a PDF transcript and its related exhibits as separate files, provide your client with a single PDF document with hyperlinked exhibits embedded inside the transcript. RB9 can automatically add hyperlinks in PDF transcripts to related exhibits, so your clients can view exhibits in context by clicking the links in the transcript.

TIP: Save time with a default set of patterns

Before using Link Exhibits, set up common file names and *aliases* (the words and phrases used in transcripts to reference the exhibits) as patterns that RB9 can use to automatically link exhibits in Setup > Link Exhibits Patterns. (See Setting up alias patterns.)

Reference

- Link Exhibits Patterns

Step-by-step instructions

- Linking exhibits
- Setting up alias patterns

Production preferences

System-wide preferences and defaults for Production functions.

- **Envelopes**

  Defaults for printing envelopes from RB9.

- **FedEx Account for Shipping Labels**

  Federal Express account information for printing labels and tracking shipments within RB9.

- **Repository Logging**

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

- **Signature Proxy**

  Your agency's digital signature for RB-PDF Transcripts, the invitation to reporters to set up their digital signatures on ReporterBase.net, and which RB9 user(s) receive notice when reporters send their Signature Proxy ID and password to your agency.

- **UPS Account for Shipping Labels**

  United Parcel Service account information for printing labels and tracking shipments within RB9.

Reference

- Production
- Shipping
- Repository
- RB-PDF Transcripts
- RB Digital Signature Proxy
- ReporterBase.net

Step-by-step instructions

- Customizing global preferences

Production

In addition to preparing orders from reporters' billing sheets, 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 job parties' requested services, contacts' and firm's preferred services, plus in Shipping.

Reference

- Shipping

Step-by-step instructions

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

Post Invoices

Posting an invoice updates the related job's status to Billed, and updates your RB9 ledger, so the invoice appears in your accounts receivable and financial reports.

Step-by-step instructions

- Searching unposted invoices
- 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

RB9 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 RB9 ledger, send clients copies of their invoices, either the current or original invoice, via email or traditional delivery methods, and/or archive the original.

Step-by-step instructions

- Sending & 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

RB9 Standard only

If you have clients that require electronic billing in a LEDES format, set up your LEDES preferences, and enter their codes on the case party, job 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

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 jobs from your company.

Reference

- Billing
- Electronic Billing
- Award Points

Step-by-step instructions

- Customizing global preferences

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 job, location, case, claim number and/or client matter number. Limit your search to open or paid invoices. Then get detailed information, including payment history, about the invoices.

Step-by-step instructions

- Searching for invoices

Client Activity

Search for a specific client’s invoices. You can search the client’s invoices by case 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

RB9 Standard only

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.

Step-by-step instructions

- Summarizing client activity

Resource Activity

Search for a resource’s invoices. For example, find the next pay amount or the total payable for any resource.

Step-by-step instructions

- Viewing resource activity

Resource Analysis

RB9 Standard only

Summarize a resource's billing and payroll activities. Find out what services are being provided by the resource. Compare totals by period to monitor your most productive resources. **Resource Analysis** includes sales and court taxes as separate line items so amounts match Client Activity reports.

Step-by-step instructions

- Summarizing resource activity by service item

Witness Inquiry

Find individual deponents or bring up a list of all deponents for a particular case or range of job dates. Get witness details, including original transcript location, read and sign date, production notes, etc. Enter new information about deponents.

Reference

- Witness record

Step-by-step instructions

- Searching witnesses

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. Update some information in posted transactions.

Step-by-step instructions

- Searching for payment histories

Override Resource Pay Inquiry

Audit payments made using the Override Resource Pay function separately from the resource pay total for a specific time period, a single resource, a single job, and/or a single invoice.

Reference

- Override Resource Pay

Step-by-step instructions

- Searching pay overrides

Anniversary Inquiry

RB9 Standard only

In RB9, 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 upcoming anniversaries so that you can generate envelopes and labels for cards and gifts.

Step-by-step instructions

- Celebrating client anniversaries
- Remembering important client dates

Marketing Inquiry

RB9 Standard only

Know where your business is coming from and which resources are your most valuable assets. Discover problems, such as inactive clients, to deal with proactively, such as sending them reminder cards.

TIP: Use this function to:

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

Reference

- Client Of
- Sales Rep

Step-by-step instructions

- Knowing your market
- Evaluating your business by resource

Accounts Receivable

Accounts receivable, referred to as **receivables** in RB9, are amounts owed to your company from clients due to sales of goods and services.

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

- Retainers

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 RB9 to keep your RB9 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
- Entering miscellaneous receipts
- Recording refunds made
- 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

Resource Billings Report

RB9 Standard only

When an invoice is generated in RB9, resources' earnings are created simultaneously. You can have an unlimited number of earnings per invoice. The Resource Billings Report lists each earning, grouped and subtotaled by resource. The report includes a grand total on the last page adding together all the resources' earnings in the report.

If your firm currently provides resources copies of their invoices, you can provide this report instead. Resources can check that they are getting paid for their work that was billed without seeing all the details on the invoice to the client.

Step-by-step instructions

- Providing resources with billing reports

Daily Register

RB9 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 jobs 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, finance charge, 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, miscellaneous receipts, refunds, 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

RB9 Standard only

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

Reference

- Aged A/R

Step-by-step instructions

- Keeping track of accounts receivable balances

Finance Charges

RB9 can automatically generate a finance charge for each invoice that is more than 30 days old 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. You can also manually generate finance charges.

Step-by-step instructions

- Generating finance charges
- Clearing finance charges
- Printing finance charges reports

Monthly Journals

Monthly journal reports break 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 jobs 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

- 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. 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
- Collections workflow

Step-by-step instructions

- Finding overdue invoices

Send Statements

Monthly statements summarize each client's overdue invoices.

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

RB9 Standard only

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

RB9 Standard only

View all invoices paid within a specific period, grouped and sorted by payment date.

Step-by-step instructions

- Viewing paid invoices

Voided Invoices

RB9 Standard only

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

Reference

- Void

Step-by-step instructions

- Viewing voided invoices
- Voiding invoices

Collection Letters

RB9 Standard only

Use RB9'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 RB9 and invoices attached) and following up until you are paid.

Reference

- Collections
- Collections workflow
- Aged A/R

Step-by-step instructions

- Finding overdue invoices
- Sending collection letters

Collection Follow-up

RB9 Standard only

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

Reference

- Collections
- Collections workflow

Step-by-step instructions

- Following up on collection promises

Collection Forecast

RB9 Standard only

Forecast future income from collections based on current outstanding invoices.

Reference

- Collections
- Collections workflow

Step-by-step instructions

- Forecasting cash flow from collections

Receivables preferences

System-wide preferences and defaults for Receivables functions.

- **Payment Receipts**

  Set default subject line for RB9 payment receipts.

- **Statement**

  Options for printing and emailing statements.

Reference

- Receivables
- Send Statements
- Send Payment Receipts

Step-by-step instructions

- Customizing global preferences

Monthly reports at a glance

RB9 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 RB9 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 *(RB9 Standard only)*	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 *(RB9 Standard only)*	Lists all invoices paid within the specified period, grouped and sorted by the payment date.
Voided Invoices	Receivables *(RB9 Standard only)*	Lists all invoices voided within the specified period, grouped and sorted by the void date.
Gross Profit	Reports *(RB9 Standard only)*	Lists gross profit amounts for each job or invoice. Gross profit is the difference between the invoice amount and resource cost.
Insurance Billing	Reports *(RB9 Standard only)*	Lists all invoices billed directly to an insurance company (or other third party), grouped and subtotaled by client and insurance company.
Misc. Sales	Reports *(RB9 Standard only)*	Summarizes each invoice (containing the specified service items), grouped and subtotaled by client.

Business Analysis	Reports *(RB9 Standard only)*	Provides an instant snapshot of your business, with the sales amount and gross profit shown for different periods for comparison.

Client-related reports

Report	Location	Description
Client Account Activity	Receivables *(RB9 Standard only)*	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 *(RB9 Standard only)*	Shows all invoices (starting with O&1), grouped and subtotaled by client. Sorting this report by amount can generate a holiday gift list.

Resource-related reports

Report	Location	Description
Sales Commission	Payables *(RB9 Standard only)*	Lists all invoices that include a commission, grouped and subtotaled by resource or sales rep (account executive). Commissions are automatically generated from invoices on jobs initiated by a resource's or sales rep's client.
Total Payable	Payables	Lists all invoices still due to resources, grouped and subtotaled by resource.
Additional Resource Production	Payables *(RB9 Standard only)*	Lists all invoices that include additional pay, grouped and subtotaled by resource.
Resource Production	Reports *(RB9 Standard only)*	Lists all invoices (including the page count) generated for the specified period, grouped and subtotaled by resource.
Original Page Production	Reports *(RB9 Standard only)*	Lists all jobs (including the page count) generated for the specified period, grouped and subtotaled by resource.
Task Turnaround Analysis	Reports *(RB9 Standard only)*	Summarizes by resource how quickly they turn around jobs on average for the specified period.

Tax-related report

Report	Location	Description
Sales Tax	Payables *(RB9 Standard only)*	Lists all invoices that include a sales tax amount, generated for the specified period.

Override Resource Pay

Manually change resource pay amounts on posted invoices that were calculated automatically by the system.

Reference

- Post Invoices

Step-by-step instructions

- Correcting resource pay

Pay Adjustments

Before closing payroll, you can adjust resource earnings for the current payroll, including applying recurring deductions.

Reference

- Payables payroll procedure

Step-by-step instructions

- Managing pay adjustments
- Entering pay adjustments
- Generating recurring deductions

Pay Resources

Pay Resources is where you set payroll for an open payroll date, including reviewing scheduled payments to resources, sending draft pay statements to resources, and updating which invoices will be included in payroll.

Step-by-step instructions

- Verifying resource pay
- Closing payroll

Send Resource Pay Statements

After closing payroll, create a final copy of the Resource Pay Statements report for your records and either email or print and mail resources their pay statements.

NOTE: Save time & money with online statements

If you have RB Connect, resources can view their pay statements (current and past) online, eliminating the need to print or email statements.

Reference

- RB Connect

Step-by-step instructions

- Printing resource payroll report (final copy)
- Sending resources their pay statements

Print Checks

RB9 Standard only

Print resource payroll checks from RB9 or export them in NACHA format for direct deposits or QuickBooks IIF for importing into *QuickBooks.*

Reference

- NACHA
- QuickBooks Integrator

Step-by-step instructions

- Printing resource payroll checks
- Exporting checks for direct deposits
- Exporting checks for *QuickBooks*

1099 Pay Detail

RB9 Standard only

Review payments made to independent contractors. And before printing IRS 1099-NEC forms for your independent contractors, you can adjust the gross pay totals RB9 provides.

TIP: When to use this function

A common reason for adjusting totals is if you started using RB9 after you had already issued paychecks (for independent contractors) earlier in the calendar year. Make your 1099-NEC forms accurate by entering year-to-date (YTD) information to summarize payroll transactions from January 1st up to your RB9 start date.

You can also enter checks written by hand (such as advances) using this function.

Step-by-step instructions

- Reviewing payroll amounts
- Adjusting payroll amounts

Print 1099 Forms

RB9 Standard only

View summaries of your independent contractors' taxable pay. Then print out their 1099-NEC information on preprinted laser-compatible IRS forms.

Step-by-step instructions

- Printing 1099-NEC forms

Sales Commission Report

RB9 Standard only

Report lists all invoices that include a commission, grouped and subtotaled by resource or sales rep (account executive). A commission is automatically generated from invoices on jobs initiated by a resource's or sales rep's client.

Reference

- Client Of
- Sales Rep

Step-by-step instructions

- Printing sales commission reports

Override Sales Commission

RB9 Standard only

RB9 automatically calculates commissions for sales reps and resources with their own clients. You can override the calculated commissionable amount on a single invoice without changing your commission rates.

Reference

- Sales Rep
- Client Of

Step-by-step instructions

- Overriding commissionable amounts

Additional Resource Production Report

RB9 Standard only

This report lists each invoice (including the unit count) having additional pay, grouped and subtotaled by resource.

Reference

- Additional Pay

Step-by-step instructions

- Printing additional resource production reports

Total Payable Report

Report lists all invoices still due to resources, grouped and subtotaled by resource, with a grand total that represents your current resources payable liability.

Step-by-step instructions

- Printing total payable reports

Sales Tax

RB9 Standard only

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. RB9 automatically calculates sales tax on invoices. This report lists all invoices with sales tax charges generated for a specific period.

Step-by-step instructions

- Generating sales tax reports
- Entering additional firm information
- Entering billing & pay rates

Liability Balance Log

RB9 Standard only

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

Step-by-step instructions

- Keeping track of resources payable balances

Reward Points Summary

RB9 Standard only

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 RB9, 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 court reporting firms, and OMTI makes no guarantees or assurances about these programs.

Step-by-step instructions

- Managing points

Reward Points History

RB9 Standard only

Get an overview of clients' point activity.

Step-by-step instructions

- Viewing point history

Reward Points Analysis

RB9 Standard only

Get a monthly, quarterly, and yearly breakdown of clients' point activity.

Step-by-step instructions

- Analyzing point activity

Payables preferences

System-wide preferences and defaults for Payables functions.

- **1099 Form**

  Options to make RB9 information print properly on your 1099 forms.

- **Check**

  Options to make RB9 information print properly on your preprinted checks.

- **Draft Pay Statement**

  Options to customize emails that accompany draft pay statements to resources.

- **NACHA**

  Information for direct depositing resource pay.

- **Pay Statement**

  Options to customize emails that accompany resource pay statements.

- **Payroll**

  Options for when you pay resources.

Reference

- Payables
- Print 1099 Forms
- Print Checks
- NACHA

Step-by-step instructions

- Customizing global preferences

Business Analysis

RB9 Standard only

Provides an instant snapshot of your business, with the sales amount and gross profit shown for different periods for comparison.

Step-by-step instructions

- Analyzing your business

Gross Profit

RB9 Standard only

This report lists the gross profit (in amount and percentage) for each job or invoice. **Gross profit** is the difference between the invoice amount and the resource cost.

Step-by-step instructions

- Producing gross profit reports

Misc. Sales

RB9 Standard only

This report summarizes each client's billed miscellaneous charges for a specific date range. 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

RB9 Standard only

This report lists all invoices (starting with O&1), grouped and subtotaled by client. Sorting this list by amount can generate a holiday gift list. Each client is listed with the original amount, copy amount, and payment history.

Step-by-step instructions

- Producing client rating reports

Insurance Billing

RB9 Standard only

This report lists each invoice billed directly to an insurance company (or other third party), grouped and subtotaled by client and insurance company.

Step-by-step instructions

- Producing insurance billing reports

Resource Production

RB9 Standard only

View all invoices (including the page count) generated for a specific period, grouped and subtotaled by resource. Print out office copies and resource copies (which exclude invoice amounts).

Step-by-step instructions

- Producing resource production reports

Original Page Production

RB9 Standard only

View all jobs (including the page count) produced for a specific period, grouped and subtotaled by resource.

Step-by-step instructions

- Producing original production reports

Task Turnaround Analysis

RB9 Standard only

This report summarizes by resource how quickly they turn around jobs on average for the specified period.

Step-by-step instructions

- Producing turnaround analysis reports

Daily Tracking Summary

RB9 Standard only

List all jobs 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

Tracking Productivity Analysis

RB9 Standard only

Do you want to find out how many tracking items have been finished on time? Analyze productivity by item, step, manager, or resource.

Reference

- Tracking

Step-by-step instructions

- Analyzing tracking productivity

Bulk Import

Instead of re-keying your existing client and reporter/resource information into RB9, export them to a *Microsoft Excel* spreadsheet from your application, then import them into RB9.

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 resources at once
- Updating multiple locations at once
- Updating multiple jobs at once

Tag Manager

RB9 Standard only

If you use tags to organize entities, 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
- Resources
- 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 RB9 functions.

TIP: Customize the default templates & create your own

RB9 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:

- Job confirmations & cancellations
- Assignment confirmations & cancellations
- Letters to contacts, witnesses, & others related to a job *RB9 Standard only*
- Payment receipts *RB9 Standard only*
- RB-PDF Transcript cover pages & errata sheets *RB9 Standard only*
- Collections letters *RB9 Standard only*

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Creating/updating forms & letters

Label Templates

RB9 Standard only

Store label templates you create in DYMO software to use in RB9 functions to print labels using DYMO printers.

Reference

- Labels
- DYMO

Step-by-step instructions

- Creating DYMO label templates
- Managing label templates

Notes Templates

RB9 Standard only

Instead of typing the same information into the notes for each case/job — or copying and pasting the info from a *Word* doc — create templates of boilerplate text to fill the notes fields in cases and jobs. You can create notes templates for:

- Case Remarks
- Job Confirmation Notes
- Job Production/Billing Notes
- Job Resource Notification Notes
- Job Scheduling Notes

Reference

- Notes Groups

Step-by-step instructions

- Creating/updating notes templates
- Adding boilerplate text to remarks & notes

Notes Finder

RB9 Standard only

There are many places in RB9 to keep notes, so it is sometimes difficult to remember exactly where a particular note was entered. Use **Notes Finder** to search various Notes Logs for notes entered by both users and the system.

Reference

- Notes Logs

Step-by-step instructions

- Searching notes

Repository Download Log

RB9 Standard only

After setting up RB9 to record repository activity, track all file download activities performed by in-house staff as well as by clients and resources via RB Connect as required by general security rules for business applications. Give contacts the ability to track their own download activity in RB Connect.

Reference

- RB Connect

Step-by-step instructions

- Tracking inhouse and online repository access

Download Backup File

RB9 Standard only

Download backup files of your RB9 database from up to 7 days in the past.

Step-by-step instructions

- Downloading backup files of your database

Email Log

RB9 Standard only

Emails sent from RB9, such as job confirmations and cancellations, repository and transcript package notifications, and overdue tasks reports are automatically logged in this function.

Reference

- Assignment Cancellation
- Assignment Notification
- Collection Letter
- Future Calendar
- Invoice
- Job Cancellation
- Job Confirmation
- Letter to Contact
- Letter to Other
- Letter to Witness
- Overdue Tasks Report
- Repository Notification
- Resource Pay Statement
- Statement
- Transcript Package Notification

Step-by-step instructions

- Viewing email logs

Merge History

You can merge entities and instances of certain other types of RB9 data into similar entries in RB9's database. Use this function to review merges of cases, contacts, firms, locations, and resources for the current month or any date range.

Reference

- Entities

Step-by-step instructions

- Merging data
- Viewing merged data histories

Query Maker

RB9 Standard only

If RB9 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 in your RB9 database. You can also 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 RB9 database, add the Data Reader plug-in to RB9. It allows you to use your RB9 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

RB9 Standard only

QuickBooks Integrator streamlines the integration of RB9 data into *QuickBooks,* a popular accounting package used by many court reporting and other legal support businesses.

NOTE: Integrator imports RB9 data into *QuickBooks* for you

With RB9's QuickBooks Integrator, you can:

- Import contacts/customers and resources/vendors from RB9 into *QuickBooks,* eliminating the need to re-key information.
- Import invoices that were generated in RB9 directly into *QuickBooks* so that you can run consolidated financial statements.
- Import payments and other transactions directly into *QuickBooks* so that your bank deposits record and account balances will be accurate.
- Import resource paychecks directly into *QuickBooks* so that you can reconcile your bank account easily.

IMPORTANT: Set up *QuickBooks* to work with RB9

Before you can import RB9 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 RB9.

Reference

- QuickBooks preferences

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with RB9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Importing resource payroll checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Send Invitations for Signature Proxy

RB9 Standard only

Before you can apply reporters' digital signatures to RB-PDF Transcripts, reporters must grant you permission to use their digital signatures. Invite reporters to share their signatures with you.

Reference

- RB-PDF Transcripts
- RB Digital Signature Proxy

Step-by-step instructions

- Sending invitations to reporters

Signature Proxy Usage

RB9 Standard only

RB9 records each proxy application of RB Digital Signatures to RB-PDF Transcripts. You can access these records for any time period.

Reference

- RB Digital Signature Proxy
- RB-PDF Transcripts

Step-by-step instructions

- Monitoring signature usage

RB Network

If you would like to share work with other agencies and related businesses that use RB9, this function lists contact information for all of the RB9 users who have agreed to join this roster.

Step-by-step instructions

- Finding network members

Tools preferences

System-wide preferences and defaults for Tools functions.

- **Email Log** *(RB9 Standard only)*

  Options for which emails RB9 saves and how long they are stored.

- **QuickBooks** *(RB9 Standard only)*

  Information needed for integrating RB9 data into your *QuickBooks* program, either the desktop or online version.

- **RB Network**

  Your contact information for other RB9 users to access through RB Network function.

Reference

- Email Log
- QuickBooks Integrator
- RB Network

Step-by-step instructions

- Customizing global preferences

Firms

Firms are entities you do business with, such as law firms, other court reporting firms, vendors, insurance companies, corporate clients, and courts.

Step-by-step instructions

- Adding firms to RB9
- 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 RB9
- Updating contacts
- Searching contacts
- Looking up contacts

Resources

Resources provide your business with a service or support. For example, reporters, videographers, interpreters, transcriptionists, scopists, and account executives (sales reps) are resources. Resources do not have to be individuals. They can be other reporting agencies that cover jobs for your firm, or your conference rooms.

Reference

- Sales Rep

Step-by-step instructions

- Adding resources to RB9
- Updating resources
- Searching resources
- Looking up resources
- Scheduling conference rooms

Locations

Locations are places where jobs occur, such as court rooms or law offices.

TIP: Not all locations should be stored in Locations table

Since law firms and courts are normally entered in the Firms table, use the Locations table for other types of locations where jobs recur, such as private residences, doctors' offices, or schools. If you use your own conference rooms for jobs, enter them in the Resources table, so that you can schedule them like you do reporters and other resources.

Step-by-step instructions

- Adding locations to RB9
- Updating locations
- Searching locations
- Looking up locations
- Scheduling conference rooms

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: RB9 requires at least one business unit

Before using RB9, you must set up at least one BU so you can process receivables.

Reference

- Initial setup workflow
- Accounts receivable

Step-by-step instructions

- Setting up business units
- Updating business units

Firms

Firms are companies you do business with: They schedule depositions with you, e.g., a law firm, 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, to use as a filter when searching Firm Notes Logs.

- **Rating**

  Designation specifying your credit rating of a firm, e.g., Set Depo 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 RB9
- Recording collections efforts
- Entering firm marketing information
- Organizing with tags

Contacts

Contacts are people who work at firms that schedule jobs 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, to 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**

  Terms 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 transcript or 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 RB9
- Organizing with tags
- Adding standing requests

Resources

Resources provide services or support. They can be individuals, such as reporters, videographers, interpreters, and scopists. Or they can be affiliate reporting agencies or your conference rooms.

For how to set up lists, see Customizing lists.

- **Certification**

  Designation specifying resource board certifications or professional qualification attained, e.g., RPR or CRR.

- **Notes Type**

  Categories of notes to use as a filter when searching Resource Notes Logs.

- **Pay Group**

  Categories of time periods your company uses to pay resources, e.g., Monthly, Weekly, On Demand. You can pay each pay group separately using a different pay date and cutoff date (see Pay Dates). Pay Groups are unrelated to Pay Rate Groups, which classify resources according to their pay tier.

- **Priority Level**

  Designation specifying order of preference or availability, e.g., Staff or Overflow.

- **Resource Type**

  Designation specifying profession, e.g., Reporter, Scopist or Videographer; or other resource, e.g., Conference Room.

- **Salutation**

  Terms of address used in letters or messages for resources, e.g., Mr. or Ms.

- **Specialty**

  Designation specifying distinguishing trait or unique skill, e.g., RealTime or Spanish, so you can match resources' skills to job requirements when scheduling resources.

  To have a specialty available in RB Connect for clients to request, check its **Show to Attorney** box.

- **Tag**

  Categories to organize resources. You can use any words or phrases as a tag, e.g., Top 10.

- **Time Off Reason**

  Reasons for blocking out a time period for a resource in Resource Availability, such as Holiday, Vacation, Personal Time, or Workload. During these scheduled times off, their names do not appear in the list of available resources when assigning jobs. See Resource Availability.

Reference

- Resources
- Notes Logs
- Pay Group
- Pay Dates
- Cutoff Date
- Pay Rate Groups
- Specialties
- RB Connect
- Tags
- Resource Availability

Step-by-step instructions

- Customizing lists
- Adding resources to RB9
- Entering certifications
- Creating pay groups
- Entering general resource information
- Entering pay information
- Requiring specialties
- Organizing with tags
- Managing resource availability
- Scheduling conference rooms

Locations

Using a database of job locations makes it faster and easier to designate where a job is scheduled to take place.

For how to set up lists, see Customizing lists.

- **Location Type**

  Categories of facilities where jobs take place, e.g., Hospital, Courthouse, or School.

- **Notes Type**

  Categories of notes to use as a filter when searching Location Notes Logs, e.g., Sales or Marketing.

- **Tag**

  Categories to organize locations. You can use any words or phrases as a tag, e.g., Top 10.

NOTE: Qualifying a place as a location, firm, or resource

While the places where jobs occur could all be called locations, in RB9 there are actually 3 main categories of places where jobs occur:

- **Firms**
  Law firms and courts are normally entered in the Firms table. See Adding firms to RB9.

- **Locations**
  Other types of locations where jobs recur, such as private residences, doctors' offices, or schools. See Adding locations to RB9.

- **Resources**
  If you use your own conference rooms for jobs, enter them in the Resources table as "conference rooms," so that you can schedule them like you do reporters and other resources. See Scheduling conference rooms.

Other types of job locations that you would not include in the locations database are your business units, online meetings, or places that are one-off locations which you will not be using again. See Entering job locations.

Reference

- Locations
- Notes Log
- Tags

Step-by-step instructions

- Customizing lists
- Organizing with tags
- Adding firms to RB9
- Adding locations to RB9
- Scheduling conference rooms
- Entering job 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.

- **Resources**

  Default payment terms for originals and copies, and autofilling names.

Reference

- Contacts
- Firms
- Resources

Step-by-step instructions

- Customizing global preferences

Adding firms to RB9

You can add firms to your RB9 database in the Entities module, import them from other applications *(RB9 Standard only)*, or on the fly in cases and jobs.

1. Start a new firm

- ### From scratch

  1. **Entities > Firms**
  2. Check that the firm does not already exist in your RB9 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 RB9 via an Excel spreadsheet. See Importing entities from other systems.

- ### Within a case

  New firm will automatically be added as a party to the case.

  1. **Calendar > Cases**
  2. Find case. See Searching cases.
  3. Click **Edit** in the View Case window.
  4. In Edit Case window's **Parties** pane, click .
  5. In the **New Party** panel, click **New.**

- ### Within a job

  1. **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)**
  2. Find job. See Searching in RB9.
  3. Click **Edit** in the View Job window.
  4. In Edit Job window, **Ordering Client** pane, click ***Ordering Firm** **> Lookup Firm** *(required)* or **Scheduled By** **> Lookup Firm.**
  5. In the **Lookup Firm** panel, click **New.**

- **When creating a new contact**

  Contacts must be tied to firms in RB9. 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 a case, you will also be required to enter at least one contact into the firm. See Adding contacts.)

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 billing details and notes for your calendaring and 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 resource is responsible for collecting this firm's overdue payments (see Looking up resources), and the actionable financial status of this firm, such as COD or bankrupt. (Account statuses 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
- Firms lists
- Retainers

Step-by-step instructions

- Searching firms
- Looking up firms
- Importing entities from other systems
- Searching cases
- Searching in RB9
- Adding contacts
- Entering general firm information
- Entering additional firm information
- Entering firm addresses
- Entering firm marketing information
- Looking up resources
- Entering retainers
- Recording collections efforts
- Updating firms

Updating firms

When adding a firm to your RB9 database or at any time later, you can 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 a case/job

     1. Click the hyperlinked contact within the **Parties** pane in a case or job (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 a job

     1. In the **Ordering Client** pane of:
        - View Job window, click the **Scheduling Firm** or **Ordering Firm** field's .
        - Edit Job 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/Bill To firm on an invoice

     1. In a View Invoice/Edit Invoice window, click the **Sold To Firm/Bill To Firm** field's

in the **General** pane.

(In a Turn In-Job# window's **Edit Invoice** panel, click the ***Sold To Firm/Bill To Firm** field's **> View Firm.** See Adding billing information to invoices.)

2. Click **Edit** in the **View Firm** panel.

- **In a results grid**

  Marketing Inquiry *(RB9 Standard only)*

  Click the firm's:

  - **> Edit**
  - Hyperlinked name. Then click **Edit** in the **View Firm** panel.

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 RB9.
   - **Update a contact:** Click the contact's hyperlinked name. See Updating contacts.

3. Update firm information

1. Click **Edit** in the **View Firm** panel.
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 billing details and notes for your calendaring and production/billing departments, see Entering additional firm information.
   - **Notification Email**

     To enter company email addresses and designate them to receive specific types of emails, such as job 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 jobs with your company. See Adding standing requests.

- **Task Due Days**

  To enter scheduling preferences, see Entering default task deadlines.

- **Preferred Resources**

  Resources the firm wants assigned to jobs they schedule or order with your company. See Managing clients' resource preferences.

- **Blocked Resources**

  Resources the firm does not want assigned to jobs they schedule or order with your company. See Managing clients' resource preferences.

- **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 RB9 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
- Firms lists
- Retainers

Step-by-step instructions

- Adding firms to RB9
- Searching firms
- Looking up firms
- Adding billing information to invoices
- Adding contacts to RB9
- Updating contacts
- Adding parties
- Scheduling jobs
- Entering general firm information
- Entering additional firm information
- Entering firm addresses
- Managing notification emails
- Organizing with tags
- Adding standing requests
- Entering default task deadlines
- Managing clients’ resource preferences
- 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 RB9

You can add contacts to your RB9 database in advance, import them from other applications *(RB9 Standard only)*, or on the fly in firms, cases, jobs, and invoices. Contacts must be tied to a firm in RB9, and you can add firms on the fly too.

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. See Looking up firms. If the firm does not exist in your database, click **New** in the Lookup Firm window. (See Adding firms to RB9.)

- ### 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 RB9 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 RB9. This way you can check that the contact has not been entered before.
     - Click **New** to add a contact.

- ### Within a case

  Contact will automatically include firm information.

  1. In an Edit Case window's **Parties** pane, click:
     - **A hyperlinked contact** — To change the contact to a new contact at an existing party.

- — To add another party. See Looking up firms, Adding firms to RB9.

2. In the **Edit Party/New Party** panel, click ***Contact** > **New Contact** *(required)*.

- **Within a job**

  In an Edit Job window's **Ordering Client** pane, click ***Ordering Contact** > **New Contact** *(required)* or **Scheduled By** .

- **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

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, RB9 creates a drop-down 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 drop-down *(required)*.

- **Without options**

  Type the contact's name exactly as you want it to appear in RB9 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, select No in the current entry's **Active** slider 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 RB9
- 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 RB9 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.

   - **Ordering/scheduling contact for a job**

     - In a View Job window, click the **Scheduled By/*Ordering Contact** field's in the **General** pane. Then click **Edit** in the **View Contact** panel.
     - In an Edit Job window, click the **Scheduled By/*Ordering Contact** field's **> View Contact** in the **General** pane. Then click **Edit** in the **View Contact** panel.

   - **As a party to a case/job**

     1. In an Edit Case/Edit Job 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* *(RB9 Standard only)*

  Click the contact's:

  - **> Edit**
  - Hyperlinked name. Then click **Edit** in the **View Contact** panel.

2. 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 job, 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 job, slide **Active** to No 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 RB Connect activities. See Granting access.

   - **Have Access To**

     Contacts this contact is senior to, i.e., contacts whose RB 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 jobs with your company. See Adding standing requests.

- **Anniversaries**

  Contact's birthday, wedding anniversary, and other important dates. RB9 will automatically remind you of an upcoming event within a set number of days. See Remembering important client dates.

- **Preferred Resources**

  Resources the contact wants assigned to jobs they schedule or order with your company. See Managing clients' resource preferences.

- **Blocked Resources**

  Resources the contact does not want assigned to jobs they schedule or order with your company. See Managing clients' resource preferences.

- **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 RB9 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
- RB Connect
- Tags
- Senior
- Award Points

Step-by-step instructions

- Adding contacts to RB9
- Searching contacts
- Looking up contacts
- 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 clients' resource preferences
- Managing contacts' award points
- Uploading files to a repository
- Making entries in notes logs
- Managing notes logs
- Canceling notes
- Removing entities

Adding resources to RB9

You can add resources to RB9 in the Entities module, import them from other applications *(RB9 Standard only)*, or on the fly during turn-in.

1. Start a new resource

- ### From scratch

  1. **Entities > Resources**
  2. Check that the resource does not already exist in your RB9 database. See Searching resources.
  3. If the resource doesn't appear in your search, click **New** in the Resources window.

- ### From another application

  If you have an existing database of resources in another application, you can import the data into RB9 via an Excel spreadsheet. See Importing entities from other systems.

- ### During turn-in

  1. **Production > Turn In**
  2. Find job. See Searching in RB9.
  3. Click in **Witness** pane of the Edit Turn In – Job# window.
  4. In New Witness window, click ***Resource** field's ▽ **> Lookup Resource** *(required).*
  5. In the **Lookup Resource** panel, click **New.**

2. Enter required information

In the New Resource window's **General** pane, enter the resource's name:

- ### If the resource is not a person:

  1. Type the resource's name in ***Full Name** *(required).*
  2. If you commonly refer to the resource by another name, enter that alias in **a/k/a.** You can search for the resource by name or alias. The alias will appear in parentheses after the resource name in search results.

- **If the resource is a person:**

  1. You can enter the resource's name 2 ways:

     - **Automatically**

       Set up preferences for Autofill in System Preferences > Entities > Resources first.

       1. Enter resource'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 resource's name. You can edit the full name if desired.

     - **With options**

       1. Enter their given name **(First Name),** middle name or initial **(Mi.),** family name **(Last Name),** and title **(Salutation).**
       2. Click ▾ next to ***Full Name** field *(required)* and select one of the variations of the resource's name in the drop-down.

  2. If an individual has a nickname they prefer to go by, enter that alias in **a/k/a.** You can search for the person by name or alias. The alias will appear in parentheses after the resource name in search results.

TIP: Use naming options

While you can manually enter a person's name in the ***Full Name** field, if you enter their given and family names in the separate name fields instead you can use the **First Name** or **Last Name** filters to limit results when searching for individuals. See Searching resources.

3. Enter optional information

You can enter information now or at any time after saving:

- **General**

  To enter basic resource information, including contact information and important warnings, see Entering general resource information.

- **Additional**

  To enter user credentials for online and digital signatures, plus miscellaneous information, see Entering additional resource information.

- **Pay Info**

  To enter details about how resource is paid, see Entering pay information.

NOTE: Original & Copy Terms are required

When setting up a new resource, RB9's **Pay Info** pane defaults **Original Term** and **Copy Term** to numbers of days set in System Preferences > Entities > Resources. You can change this resource's terms at any time, but you cannot leave these fields blank.

- #### Work Schedule

  To set the resource's default weekly availability, see Setting work schedules.

4. ## Save resource

   Click **Save >**

   - **Save & Edit:** To enter more resource information. The window changes to Edit Resource, adds additional panes, and scrolls to **Notification Email** and **Tags** panes. See Updating resources.
   - **Save & Close:** If you have no more information to add at this time.

Reference

- Microsoft Excel
- Turn In
- Bulk Import
- Resources preferences
- RB Digital Signature Proxy

Step-by-step instructions

- Searching resources
- Importing entities from other systems
- Searching in RB9
- Entering general resource information
- Entering additional resource information
- Entering pay information
- Setting work schedules
- Updating resources

Updating resources

When adding a resource to your RB9 database or at any time later, you can add to or edit the resource's information.

1. Find the resource

Access a resource to update in one of the following ways:

- **By searching**
  Entities > Resources (see Searching resources).
- **In a View/Edit window**
  1. Click:
     - **> View Resource** next to a **Resource** field.
     - next to any field labeled:
       Resource
       Client Of
       Sales Rep
       Assign To
  2. Click **Edit** in the **View Resource** panel.
- **In a results grid**
  Marketing Inquiry *(RB9 Standard only)*
  Click the resource's:
  - **> Edit**
  - Hyperlinked name. Then click **Edit** in the **View Resource** panel.

2. Update information

1. Within an Edit Resource window/panel, you can enter or update any information:
   - **General**
     To enter basic resource information, including contact information and important warnings, see Entering general resource information.
   - **Additional**
     To enter user credentials for online and digital signatures, plus miscellaneous information, see Entering additional resource information.

- **Pay Info**

  To enter details about how resource is paid, see Entering pay information.

- **Work Schedule**

  To set the resource's default weekly availability, see Setting work schedules.

- **Notification Email**

  Enter resource's email addresses and designate them to receive specific types of emails, such as job or payroll emails. See Managing notification emails.

- **Tags**

  Select tags to mark the resource as part of specific groups. See Organizing with tags.

- **Specialties**

  Note any specialized knowledge or expertise the resource has. See Entering specialties.

- **Certifications**

  Include any certifications the resource has. See Entering certifications.

- **Repository**

  Keep files related to the resource in your RB9 database. See Uploading files to a repository.

- **Notes Log**

  Keep a set of notes about this resource 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 resource information.
   - **Save & Close:** If you have no more information to add at this time.

TIP: No longer need a resource?
You can delete it, or merge it into another resource, saving its historical data. See Removing entities.

Reference

- Marketing Inquiry
- Tags
- Specialties
- Notes Log

Step-by-step instructions

- Searching resources
- Scheduling jobs
- Generating invoices
- Adding resources to RB9
- Entering general resource information
- Entering additional resource information
- Entering pay information
- Setting work schedules
- Managing notification emails
- Organizing with tags
- Entering specialties
- Entering certifications
- Uploading files to a repository
- Making entries in notes logs
- Managing notes logs
- Canceling notes
- Removing entities

Adding locations to RB9

You can add locations to RB9 in the Entities module or on the fly in cases and jobs.

1. Start a new location

- ### From scratch

  1. **Entities > Locations**
  2. Check that the location does not already exist in your RB9 database. See Searching locations.
  3. If the location doesn't appear in your search, click **New** in the Locations window.

- ### Within a job

  1. **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)**
  2. Find job. See Searching in RB9.
  3. Click **Edit** in the View Job window.
  4. In Edit Job window, scroll or jump to **Job Location** pane.
  5. Select Location in **Location Type** drop-down.
  6. Click **Location** field's . (If you are changing from an existing location, click **> Lookup Location.)**
  7. In the **Lookup Location** panel, click **New.**

- ### Within a case

  1. **Calendar > Cases**
  2. Find case. See Searching cases.
  3. Click **Edit** in the View Case window.
  4. In Edit Case window, click **More > Jobs (List View).**
  5. Continue with steps in **Within a job** section above.

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.

4. ## Save location

   Click **Save >**

   - **Save & Edit:** To enter more location information. The window changes to Edit Location, adds additional panes, and scrolls to **Tags** pane. See Updating locations.
   - **Save & Close:** If you have no more information to add at this time.

Step-by-step instructions

- Searching locations
- Looking up locations
- Updating locations
- Entering general location information

Updating locations

When adding a location to your RB9 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 a job**
  Click or **> View [Location Type]** next to **Location** in the Location pane of a job, then click **Edit** in the **View [Location Type]** 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.
   - **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 are set in Lists > Locations.
   - **Repository**
     Keep files related to the location in your RB9 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
- Locations lists

Step-by-step instructions

- Adding locations to RB9
- Searching locations
- Entering general location information
- 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 RB9 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.

- **PDF Transcript Logo**

  To include your logo on RB-PDF Transcripts, see Adding your company logo to transcripts.

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 jobs coming from client requests through RB Connect. See Contact – Calendar preferences.

   3. RB9 saves the business unit, the New BU window changes to Edit BU window and adds the **Task Due Days** pane to the Edit BU window.

      - To enter scheduling preferences, see Entering default task deadlines.
      - 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 RB9, 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

- Accounting lists
- RB Connect
- Contact – Calendar 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
- Adding your company logo to transcripts
- Entering default task deadlines
- Updating business units
- Removing entities

Updating business units

When adding a business unit to your RB9 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.
   - ### Task Due Days

     To enter scheduling preferences, see Entering default task deadlines.
   - ### 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.

- **PDF Transcript Logo**

  To include your logo on RB-PDF Transcripts, see Adding your company logo to transcripts.

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
- Entering default task deadlines
- Selecting BU financial accounts
- Adding your company logo to invoices
- Adding your company logo to transcripts
- Removing entities

Removing entities

If you no longer want an entity to appear in RB9 results, you can remove it from RB9 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 RB9 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 resources
- Updating locations
- Updating business units
- Merging data

Lists

Dropdown lists in RB9 allow users to choose an entry from a set of available values, saving time and reducing errors that result from keying in entries. RB9 includes initial values and defaults for drop-down 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 RB9 lists.

To customize these lists, see Customizing lists.

- Accounting
- Cases
- Connect
- Contacts
- Firms
- Invoice
- Jobs
- Locations
- Others
- Production
- Repository
- Resources
- Tracking *(RB9 Standard only)*
- Users
- Witnesses

Step-by-step instructions

- Customizing lists

Users and Groups

Users and Groups is the tool you use to manage RB9 users, individually and grouped according to permissions, rights, and notifications.

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). RB9 uses these accounts for different financial activities in your company's business units.

TIP: Match RB9 accounts to your business uses

Although RB9 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 RB9's accounts to match your general ledger or accounting software.

Reference

- Accounting lists
- 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
- Rates setup workflow

Step-by-step instructions

- Organizing service items

Service Item Master

The **Service Item Master** defines your firm's services for clients, resources, and staff to select from drop-down lists in RB9 and RB 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
- RB Connect
- Rates setup workflow

Step-by-step instructions

- Adding service items
- Updating service items

Rush Type Master

The **Rush Type Master** lists all of the different expedited (rush) deliveries you provide along with their default billing and pay information. It drastically reduces the number of billing rate tables a typical court reporting firm needs by offering more rush charge choices.

Reference

- Rates setup workflow
- Billing rates

Step-by-step instructions

- Setting up rush charge types

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. Refer to the Rates setup workflow for the complete setup order.

Reference

- Billing Rate Group
- Rates setup workflow

Step-by-step instructions

- Setting up billing rates

Pay Rates

Pay Rates are the amounts you pay resources for services. These rates are organized into tables, so you can pay different resources different amounts for the same service items by applying different pay rate tables.

TIP: Group pay rate tables for easier searching

Pay rate tables are further organized into Pay Rate Groups, groups of similar tables, so when billing you can search through a subset of your pay rate tables instead of the whole long list of tables. Set up groups first, then rate tables. Refer to the Rates setup workflow for the complete setup order.

Reference

- Pay Rate Groups
- Rates setup workflow

Step-by-step instructions

- Setting up pay rates

Billing Sets

If you have ever ordered a combo meal at a fast food joint, then you already understand what RB9 **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 different clients, jobs and resources. You apply the actual billing rates when billing the job.

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
- Rates setup workflow

Step-by-step instructions

- Setting up billing sets
- Managing billing sets

Pay Dates

Pay Dates are the dates you cut paychecks for resources.

TIP: Reduce payroll errors by setting pay dates in advance

Pay dates in RB9 can be set up in advance to reduce the number of payroll errors caused by entering the wrong date when running payroll. You can set up pay dates for all resources or broken down by Pay Group.

Reference

- Pay Group
- Resource lists

Step-by-step instructions

- Setting up pay dates
- Managing pay dates

Invoice Headers

Invoices in RB9 include a short descriptive title called the **invoice header.**

TIP: If the default header isn't enough, create your own

RB9 automatically generates a standard invoice header for each witness 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

Invoice Messages

Invoices in RB9 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

States

Customize the State dropdown list in RB9. 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

- Customizing State dropdowns

Tracking Steps

RB9 Standard only

Set up RB9 Tracking to match your production workflow so you can track jobs as they move through the process. First set up items to be tracked (in Setup > Lists > Tracking), then define the steps each item goes through in your process.

Reference

- Tracking
- Tracking setup workflow
- Tracking lists

Step-by-step instructions

- Defining tracking steps

PDF Transcript Preferences

RB9 Standard only

Before creating RB-PDF Transcripts, set general preferences for how your transcripts will appear and what options they will include. Create as many transcript preference profiles as you want to cover different transcript requirements. You can override global preferences when creating individual transcripts.

TIP: Set profiles to match client needs & state requirements

Create multiple transcript profiles to cover different criteria, such as individual state requirements or client preferences.

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Setting global RB-PDF Transcript preferences

PDF Transcript Stamps

RB9 Standard only

Make stamp templates that can be applied to RB-PDF Transcripts so you don’t have to switch to a different program to stamp a transcript “original” or “certified copy.”

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Creating transcript stamps
- Updating transcript stamps
- Stamping transcripts

Link Exhibits Patterns

RB9 Standard only

If your exhibit file names and exhibit references in transcripts follow a pattern, for example files and references are numbered consecutively, save production time by setting up those patterns before producing PDF transcripts with automatically hyperlinked exhibits.

Reference

- RB-PDF Transcripts
- Link Exhibits

Step-by-step instructions

- Setting up alias patterns
- Linking exhibits

Exhibit Stamps

RB9 Standard only

Make stamp templates that can be applied to PDF exhibits when uploading them to RB9 which automatically include exhibit numbers and information from your RB9 database, and are customized to your specifications. If your resources turn in jobs via RB Connect, you can allow them to apply exhibit stamps when turning in jobs, and you decide which exhibit stamp templates they can choose from.

Reference

- PDF

Step-by-step instructions

- Creating exhibit stamps
- Updating exhibit stamps
- Adding stamps to exhibits

System Preferences

Preferences set here are global: They are used throughout your RB9 system by all users. Preferences that only affect your individual RB9 setup are available under User Preferences. (See Setting personal preferences.)

NOTE: Required preferences for email

If you will be sending emails from RB9, 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
  - SMS
  - System Time
- Calendar
  - Assignment Cancellation
  - Assignment Notification
  - Default Job Status
  - Future Calendar
  - Holidays
  - Job Cancellation
  - Job Confirmation
  - Job Status Automation
  - Job Status Color
  - Jobs (Monthly View)
  - Jobs (Weekly View) *(RB9 Standard only)*
  - New Job
  - Overdue Tasks Report
  - Resource Blast *(RB9 Standard only)*

    - Tasks (Monthly View)
    - Time Zone
    - Zoom
- Production
    - Envelopes
    - FedEx Account for Shipping Labels
    - Repository
    - Signature Proxy *(RB9 Standard only)*
    - UPS Account for Shipping Labels
- Billing
    - Invoice
    - LEDES 1998B
    - Reward Points
- Receivables
    - Payment Receipts *(RB9 Standard only)*
    - Statement
- Payables
    - 1099 Form
    - Check
    - NACHA
    - Pay Statement
    - Payroll
- Entities
    - Contacts
    - Firms
    - Resources
- Tools
    - Email Log *(RB9 Standard only)*
    - QuickBooks
    - RB Network

Step-by-step instructions

- Customizing global preferences
- Setting personal preferences

Send Invitations

RB9 Standard only

Invite new contacts and resources to your RB Connect by emailing them customized letters that include their user name and other pertinent information.

Reference

- RB Connect

Step-by-step instructions

- Sending invitations

Transcript Ordered

RB9 Standard only

When clients request transcripts on previously billed jobs via RB Connect, confirm the back orders and process them. Clients can track confirmed requests in RB Connect.

Reference

- RB Connect

Step-by-step instructions

- Processing back orders
- Managing back orders

Publish COD Invoices

RB9 Standard only

In RB9, COD invoices are not posted, so as a default, they do not appear when clients go to the Activity section of RB Connect. Use this function to allow the clients to pay for and download transcripts that were billed COD.

Reference

- RB Connect
- COD invoices

Step-by-step instructions

- Publishing COD invoices

Fulfill Points Redemption Orders

RB9 Standard only

If you reward contacts with points for booking depos with you, grant their online requests for point award redemption.

Reference

- RB Connect
- Award Points

Step-by-step instructions

- Fulfilling online reward point requests

Transcript Packages

RB9 Standard only

In addition to PDF transcripts, RB9 can also create transcripts that people can view in web browsers and on mobile devices. Like RB-PDF Transcripts, they can have hyperlinked exhibits and related files bundled together, but in a way that works natively in these environments.

Reference

- RB Connect
- RB-PDF Transcripts

Step-by-step instructions

- Assembling transcript packages
- Searching transcript packages

Create Full-Text Search

RB9 Standard only

Create indexed files contacts can search for specific words in their RB Connect repositories.

Requires RB Connect and Full-Text Search plug-in.

Reference

- RB Connect
- Full-Text Search plug-in

Step-by-step instructions

- Creating Full-Text Search

Approve Time-Off

RB9 Standard only

Manage resources’ time-off requests made through RB Connect.

Reference

- RB Connect

Step-by-step instructions

- Managing resources’ time-off requests

Billing Sheets

RB9 Standard only

If you have resources turn in jobs via RB Connect, view details about their billing sheets and download the billing sheets.

Reference

- RB Connect

Step-by-step instructions

- Managing billing sheets

Activity Log

RB9 Standard only

RB9 tracks activities by contacts and resources on RB Connect. The activity log will show you who is using your RB Connect and how often they access it.

Reference

- RB Connect

Step-by-step instructions

- Tracking RB Connect activities

Support Tickets

RB9 Standard only

Manage RB Connect user questions and problems, and maintain a paper trail of their resolution with support tickets.

Reference

- RB Connect

Step-by-step instructions

- Resolving support issues

Connect Preferences

RB9 Standard only

System-wide defaults for RB Connect functions.

- **Both (contact and resource) –**
  - **General:** System-wide defaults for RB Connect.
  - **Login:** Sign-in preferences for RB Connect.
  - **Invitation Letter:** Customize email invitations to contacts and resources.
  - **Forgot Password Email:** Customize email instructions for contacts and resources to reset their forgotten passwords.
  - **Branding – Connect:** Customize the look and feel of RB Connect.
  - **Branding – Portal:** Customize the look and feel of your RB9 Portal.

- **Contact –**
  - **Announcements:** Enter and format text for the contact-side RB Connect home page.
  - **Accessibility:** Designate which areas of RB Connect contacts can access.
  - **My Profile:** Designate who is alerted when contacts update their personal information in RB Connect.
  - **Calendar:** Preferences for job ordering, job canceling, and job request updating.
  - **Order Transcript:** Preferences for contacts ordering transcripts.
  - **Account Activity:** Preferences for online invoice access and payment.
  - **Transcript Packages:** Customize Transcript Packages and email notifications.
  - **Repository:** Set preferences for contacts' repository access and notifications.
  - **Reward Points:** Designate who is notified when contacts request point redemptions.
  - **Support Tickets:** Set preferences for contact support ticket notifications.

- **Resource –**
  - **Announcements:** Enter and format text for the resources-side RB Connect home page.
  - **Accessibility:** Designate which areas of RB Connect resources can access.
  - **Firms:** Show or hide firms' COD status in Firms section of RB Connect.

- **My Profile:** Designate who is alerted when contacts update their personal information in RB Connect.
- **Jobs:** Preferences for worksheet forms, global options for accessible job information, and who to notify of Client Of assignment requests.
- **Master Word List:** Select the default PDF Transcript preferences profile for compiled word lists.
- **Turn In:** Preferences for resources turning in jobs online.
- **Repository:** Designate who is notified when resources upload files to repository.

  Availability: Preferences for resources' time-off requests.

  Support Tickets: Set preferences for resource support ticket notifications.

Reference

- RB Connect

Step-by-step instructions

- Customizing global preferences

User Guide

This interactive manual can be accessed through the Help menu in the main RB9 navigation, through the Help button on the window of an RB9 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 RB9 under the Help menu. In the Help Center, you can access other RB9 training materials including step-by-step tutorials and cheat sheets.

Reference

- omti.com/rb/team-RB/help-center/videos

Update History

Update History lists every update made to RB9, grouped by its release date.

Step-by-step instructions

- Viewing RB9 updates

FAQ/KnowledgeBase

Find answers to common questions about RB9 and RB 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 RB9 questions

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 RB9.

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 RB9 and get answers from RB 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 RB9 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 RB9 software, plus links to our website and support team.

Notifications and Messages

Notifications and Messages handles RB9 system notifications and messages from other RB9 users in a format similar to an internal email system.

Step-by-step instructions

- Communicating within RB9

Change Password

When you are first given access to RB9, 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, RB9 "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 RB9 system, you can also set your own user preferences that customize your experience in RB9.

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

RB9 automatically logs you out after a certain period of inactivity for security reasons. You can also manually log out of RB9, 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: RB9 does not automatically save your work for you.

Step-by-step instructions

- Logging out of RB9

Accounting Basics

Although RB9 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 RB9's Portal or dedicated Login page.

1. On either RB9 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, RB9 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 RB9 with an incorrect password too many times, RB9 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 RB9 account.

NOTE: Changing your credentials

You might not be able to change your assigned user login name (based on your company's RB9 setup), but you can change your password at any time.

Reference

- Strong password

Step-by-step instructions

- Updating your password
- Unlocking user accounts

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 (RB9)
- Login preferences (RB 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 RB9, a Lookup panel appears. Depending on the field, the Lookup panel's search function is:

- **Lookup list**

  List of search 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 drop-down.
  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 drop-down 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 cases, Looking up contacts, Looking up firms, Looking up locations, and Looking up resources.
  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 RB9
- Looking up cases
- Looking up contacts
- Looking up firms
- Looking up locations
- Looking up resources

Search By pane

Most main functions in RB9 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: RB9 finds exact and similar possible text matches

  RB9 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" RB9 would include entries such as "Angela J. Smith" and "Angela Wurtsmith" because RB9 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 RB9 table, enter 3 percentage signs (%%%) in a text field filter for that table.

- ### Dropdown lists

  RB9 displays a default option. Click the field's ▾ to select a different option in the drop-down.

- ### Date Navigator

  Click a date field's to set a date using RB9'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 RB9
- Entering dates

Searching in RB9

You search RB9'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.

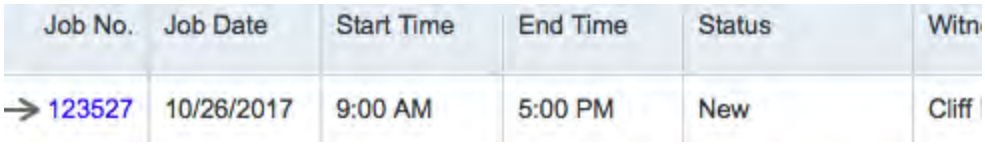
   ### NOTE: Text search results include similar entries

   RB9 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 . RB9 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.



Job No.	Job Date	Start Time	End Time	Status	Witn
→ 123527	10/26/2017	9:00 AM	5:00 PM	New	Cliff

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

- Searching cases

- Looking up cases
- Searching jobs
- Searching firms
- Looking up firms
- Searching contacts
- Looking up contacts
- Searching resources
- Looking up resources
- Searching locations
- Looking up locations

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. RB9 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: Group results by column

If a custom grid layout has a grouping zone, you can organize the grid rows into groups you designate to make it easier to see relevant related information in complicated results grids.

Depending on the function, the default grid might already group information by one of its columns. In layouts that allow grouping, you can set up one or more criteria to group by, arrange the grouping order, and delete any grouping criteria. See Grouping results.

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 RB9, you must use one of the other approved browsers (Google Chrome, Safari, Firefox, or Microsoft Edge).

Reference

- Results pane

Step-by-step instructions

- Grouping results

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 the Jobs (List View), Tasks in Progress, and Receivable Transaction Inquiry functions allow grouping. You can add multiple criteria to group by, arrange the grouping order, and delete any grouping criteria. For example in Tasks in Progress, the defaults groups tasks by resource. Add case to the grouping zone and arrange the 2 parameters to group by case then resource to see who is working on what in each case. Each group and sub-group will have their own averages and totals displayed in their footer.

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.

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. For example, grouping by resource first, then case displays tasks for each resource grouped by cases. Switching the order displays tasks for each case grouped by resource.

   - **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:** RB9 will remember your set-up the next time you access the function.

- **Click** **> Load Default Grid Layout:** RB9 will revert to the original layout. In the case of Tasks in Progress, it reverts to sorting by resource.

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
- Jobs (List View)
- Tasks in Progress
- Receivable Transaction Inquiry

Step-by-step instructions

- Customizing grids

Exporting & printing results

While you can use your browser's print function to print screens from RB9, use RB9'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.

  RB9 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, RB9 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

RB9-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, case, business unit, service item, firm, contact, resource, 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 RB9 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 functions the option is **More > Merge To.)** If an entry is required by RB9, the **Merge To** option will be grayed out/unavailable.

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 RB9.
2. Click **Merge.**
3. In the popup window, 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, **the merging entry is deleted from your RB9 database, and there is no undo option for mergers in RB9.** 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.

TIP: View the merge history of certain types of data

Use the Merge History function to see which cases, firms, contacts, resources, and locations have been merged into each other. Merge History also lists which RB9 user merged the data and when. See Viewing merged data histories.

Reference

- Historical data saved in a merge
- Lists
- Case
- Business Unit
- Service Item

- Firm
- Contact
- Resource
- Location
- Merge History

Step-by-step instructions

- Customizing lists
- Searching in RB9
- Looking up cases
- Looking up firms
- Looking up contacts
- Looking up resources
- Looking up locations
- Viewing merged data histories

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 cases, business units, service items, list options, firms, contacts, resources, or locations.

- **Cases**

  The merging case cannot have any repository files. Case info that will be saved from the merged (and deleted) case:

  - **Jobs**
  - **Parties**
  - **Notes Log entries**

- **Business Units**

  Jobs 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:

  - **Jobs**
  - **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**

- **Resource**

  Resource info will be saved from merged (and deleted) resource:

  - **Notification email**
  - **Tags**
  - **Specialties**
  - **Certifications**
  - **Repository files**
  - **Notes Log entries**
  - **Resource Availability changes**

- **Location**

  Location info will be saved from merged (and deleted) resource:

  - **Tags**
  - **Repository files**
  - **Notes Log entries**

Step-by-step instructions

- Merging data
- Entering additional BU information

Using interactive reports

Unlike most results grids in RB9, 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, RB9 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, resources, service items, or tracking items, are listed in rows.

If there are multiple data points for the report, such as in the Job Analysis report *(RB9 Standard only)* where it tracks scheduled and cancelled jobs, each year is further broken down into subheaders, in this case scheduled jobs, cancelled jobs, and net jobs.

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
- Job Analysis
- Assignment Analysis
- Client Analysis

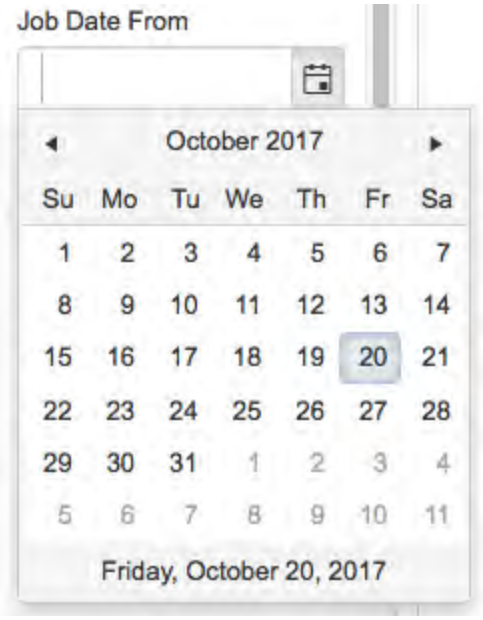
- Resource Analysis
- Reward Points Analysis
- Business Analysis
- Tracking Productivity Analysis
- Activity Log

Step-by-step instructions

- Knowing who is calling
- Analyzing job assignments by resource
- Summarizing client activity
- Summarizing resource activity by service item
- Analyzing point activity
- Analyzing your business
- Analyzing tracking productivity
- Tracking RB Connect activities

Date Navigator

Every date field in RB9 has a perpetual calendar, called **Date Navigator,** accessed by clicking 📅. It provides a quick and easy way to add or change dates.



Reference

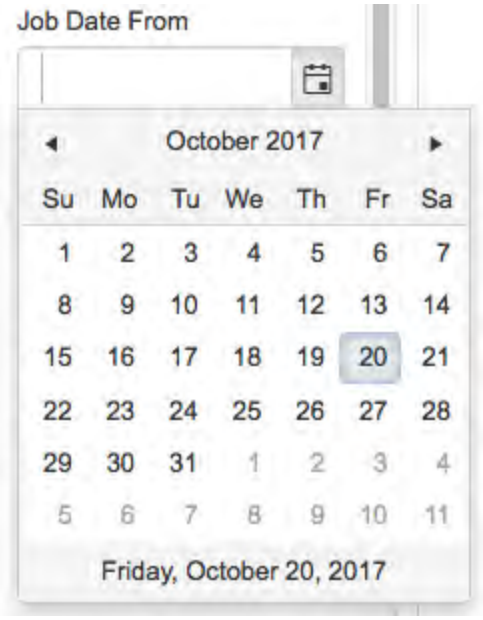
- Search By pane

Step-by-step instructions

- Entering dates

Entering dates

Instead of typing in dates, use the Date Navigator attached to every date field to view and select dates.



- **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.

TIP: Change dates using your keyboard

You can also change dates by using the keyboard to type the date in the field instead of using the Date Navigator. Use MM/DD/YYYY format.

Emailing & texting from RB9

You can email and/or text contacts, resources, locations, and other RB9 users from within RB9. Customize the email and text contents and include email attachments. Send individual emails/texts or send them in batches.

Continued from Confirming single jobs, Rescheduling jobs, Canceling jobs, Sending job confirmations or cancellations, Sending clients their job calendars, Notifying resources individually, Sending batch assignment notifications/cancellations, 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, Sending invitations to reporters, Sending resources their pay statements, Verifying resource pay, or Sending invitations.

1. Compose email/text

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 & text messages.
- **Send from a different address:** Select an address in the **From / Email/SMS From** drop-down if you don't want to send the email/text from default address shown. (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.)
- **Use a different SMS template:** Select a different template for the text messages from the default by selecting one in the **SMS Template** dropdown. (SMS 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 & text messages.

2. If an "operation successful" popup appears, click **OK.** If sending emails from a results grid, RB9 will post a status message, "Email sent successfully," in the Result column.

NOTE: RB9 is not an email program

RB9 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 *(RB9 Standard only)*.

If you want to keep copies of all of your emails sent from RB9, enter your email address in the **Bcc Emails** field in your personal User Preferences window's **Email** pane. (See Customizing email preferences.)

Reference

- General Email preferences
- Form Templates
- Send Job Confirmation/Cancellation
- Send Assignment Notification/Cancellation
- Send Invoices
- Invoice Inquiry
- User Preferences

Step-by-step instructions

- Confirming single jobs
- Rescheduling jobs
- Canceling jobs
- Sending job confirmations or cancellations
- Sending clients their job calendars
- Notifying resources individually
- Sending batch assignment notifications/cancellations
- 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
- Sending invitations to reporters
- Sending resources their pay statements

- Verifying resource pay
- Sending invitations
- Managing notification emails
- Customizing emails, messages, web pages & stamps
- Customizing communications
- Creating/updating forms & letters
- Viewing email logs

Composing emails & text messages

Add/edit email and SMS contents and include email attachments in RB9's mail composer.

Continued from Emailing & texting from RB9, Entering general contact information, Entering general location information, Entering general resource information, Alerting clients, Viewing client activity, Finding overdue invoices, Sending collection letters, Sending letters to contacts, Sending letters to witnesses, Sending letters to others, Entering general witness information, Updating witnesses, Finding network members, and Managing tags.

1. Compose email

If you are sending an email, you can change these options or use the defaults in the **Email** or **Email/SMS** panel/popup:

- ***From / *Email/SMS 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 the default are set in System Preferences > General > Email.)

- ***Email Template**

  Your default email template appears. To use a different template for the email from the default, select one in the dropdown. (Email templates and the default are set in System Preferences. See Customizing communications.)

- ***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 the email address.

- ***Email 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.)*

- ***Email 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 & stamps.

NOTE: Customize form letters

If you are sending an email based on a pre-set RB9 message or an RB9 template (such as job confirmations), 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. Compose text message

If you are sending text messages, you can update these options or use the defaults:

- ***SMS Template**

  Your default SMS template appears. To use a different template for the text message from the default, select one in the dropdown. (SMS templates and the default are set in System Preferences. See Customizing communications.)

- ***SMS Subject**

  Required. Enter or edit the text that will appear in the text message's subject line if needed.

- ***SMS Message**

  Required. Enter or edit the text that will appear as the body of the message if needed.

3. Set options

Depending on the function, you might have one or more of these 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:
  - Send Job Confirmation/Cancellation
  - Send Assignment Notification/Cancellation
  - 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.

4. Send email/text

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, RB9 will post a status message, "Email sent successfully," in the Result column.

NOTE: RB9 is not an email program

RB9 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 *(RB9 Standard only)*.

If you want to keep copies of all of your emails sent from RB9, enter your email address in the **Bcc Emails** field in your personal User Preferences window's **Email** pane. (See Customizing email preferences.)

Reference

- Email preferences
- Form Templates
- Send Job Confirmation/Cancellation
- Send Assignment Notification/Cancellation
- Send Invoices
- Invoice Inquiry
- User Preferences

Step-by-step instructions

- Emailing & texting from RB9
- Entering general contact information
- Entering general location information
- Entering general resource information
- Alerting clients
- Viewing client activity
- Finding overdue invoices
- Sending collection letters
- Sending letters to contacts
- Sending letters to witnesses
- Sending letters to others
- Entering general witness information
- Updating witnesses
- Finding network members
- Managing tags
- Managing notification emails
- Customizing emails, messages, web pages & stamps
- Customizing communications
- Creating/updating forms & letters
- Viewing email logs

Notes Logs

In any View or Edit window, notes entered either by a user or automatically by RB9 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 RB Connect or in any correspondence with clients or resources.

Reference

- RB Connect

Step-by-step instructions

- Making entries in notes logs
- Managing notes logs
- Canceling notes

Making entries in notes logs

Enter notes in Notes Logs to keep a paper trail in RB9. You can make entries in the Notes Log of any:

- **Case**
- **Job**
- **Firm**
- **Contact**
- **Resource**
- **Location**
- **Witness**
- **Invoice**
- **Tracking path**

RB9 also makes notes for you. Notes you, other staff, and RB9 enter appear chronologically in the Notes Log of the RB9 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 RB9 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 use only and are not published on RB Connect or in any correspondence with clients or resources.

1. Create new note

1. In any 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 *job's* Notes Log displays the default in Lists > Jobs > 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

     Select the note's contact method (i.e., how the note was received) in the drop-down.

   - ### Notes Type

     Select a category in the drop-down.

   - ### Set Remind

     Slide to Yes to have a reminder sent to someone through RB9. When checked, the following fields appear:

     - ***Remind Date** – *Required.* Enter the date and time (or use the Date Navigator and time drop-down) for sending a follow-up. (See Entering dates.)
     - ***Remind To –** *Required.* Select someone in the drop-down to receive a reminder message on that day from RB9. See Communicating within RB9.

     #### NOTE: Names included in reminder Subject lines

     Reminders sent from cases, firms, contacts, resources, and locations automatically include the related name for easy identification.

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 RB9.

Reference

- Case
- Job
- Firm
- Contact
- Resource
- Location
- Witness
- Invoice

- Tracking path
- Others lists
- Jobs lists
- RB Connect
- Date Navigator

Step-by-step instructions

- Canceling notes
- Managing notes logs
- Entering dates
- Communicating within RB9

Managing notes logs

As you use RB9 Notes Logs, you might find some logs get quite lengthy. As the default, RB9 shows every notes log entry, except canceled notes, for the specific case, job, firm, contact, resource, location, witness, or invoice. You can filter your notes log entries to see only specific types of notes within a log, notes made by specific staff members, and/or notes received in specific ways, such as via email or phone calls. 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 RB9 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.** RB9 filters the notes log to show only notes that match the filter(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

- Cases lists
- Contacts lists
- Firms lists

- Invoice lists
- Jobs lists
- Locations lists
- Resources lists
- Witnesses lists

Step-by-step instructions

- Making entries in notes logs
- Canceling notes
- Entering dates
- Communicating within RB9

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 letters

RB9 Standard only

When email isn't appropriate for correspondence, you can still have RB9 compose letters using form templates that automatically populate with relevant RB9 information, but in an editable, print-friendly format.

Continued from:

- Sending letters to contacts
- Sending letters to witnesses
- Sending letters to others
- Sending collection letters

1. In the **Print Letter** panel, your letter appears formatted according to its template and with its RB9 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 letters to contacts
- Sending letters to witnesses
- Sending letters to others
- Sending collection letters
- Creating/updating forms & letters

Printing invoices, statements & reports

The invoices, statements, and reports that RB9 generates cannot be edited in RB9 (unlike RB9 letters generated from form templates). You can export them to various formats or print them.

When RB9 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, 2 /3, 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:

  - **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 RB9.

- **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 RB9 reports

Some search criteria you use to generate a report in RB9 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 resource or contact in a report generated for that resource/contact
- Selected BU, if the report is for giving to a resource or 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: RB9 form letters are editable; invoices, statements & reports are not

Form letters in RB9 can be customized in Form Templates. You can also edit individual letters on the fly before sending. RB9 reports, including invoices and statements, are not editable.

Reference

- Microsoft Excel
- Form Templates

Step-by-step instructions

- Printing letters
- Printing PDFs from RB9

Microsoft Excel

Excel is the industry-standard spreadsheet software developed by Microsoft.

Step-by-step instructions

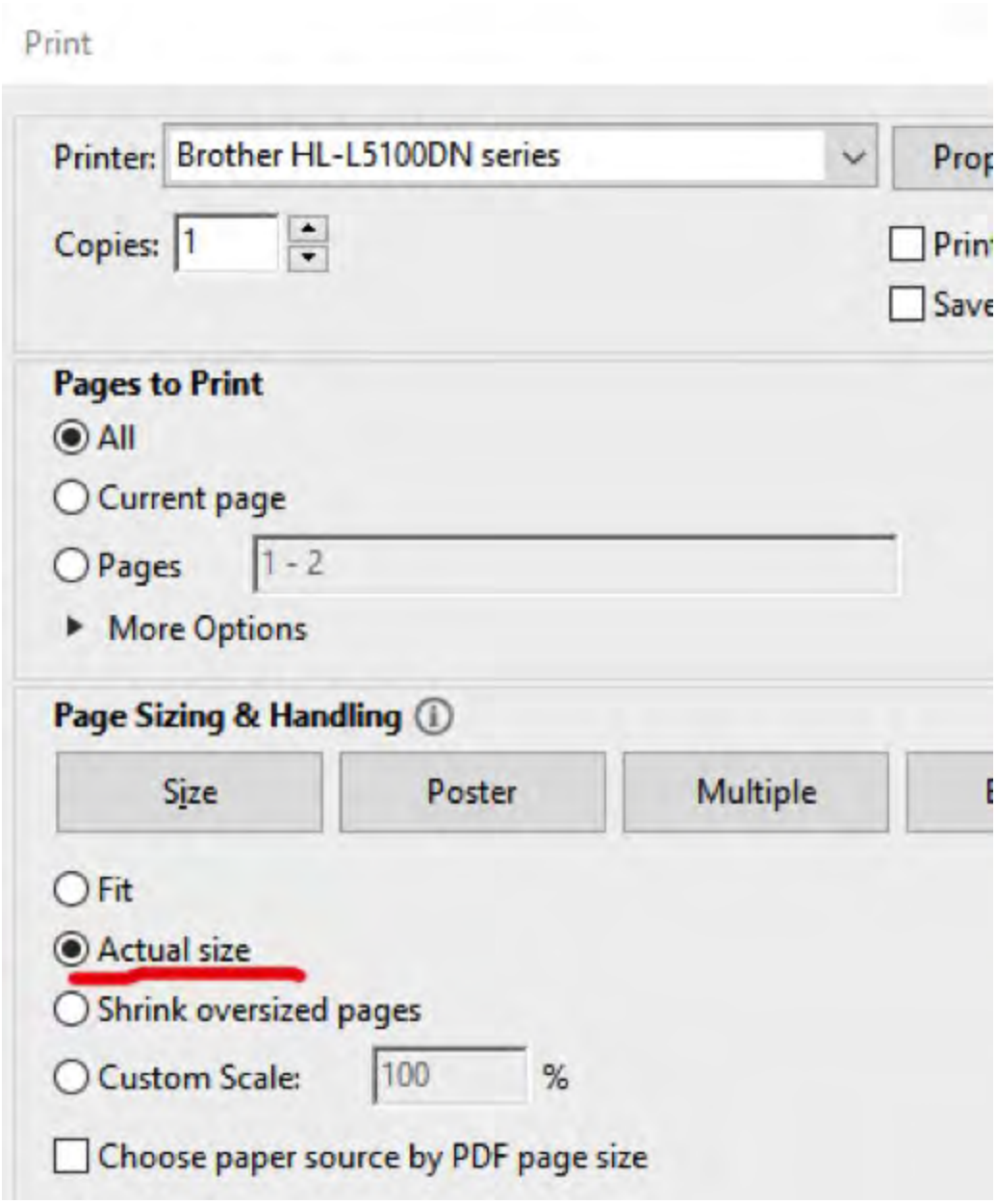
- Printing invoices, statements & reports
- Exporting & printing results
- Finding overdue invoices
- Importing entity data from other systems

Printing PDFs from RB9

When printing PDF documents such as invoices, statements, checks, and 1099s, 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.)

TIP: Use Chrome for printing PDFs

The best browser for RB9 printing is Chrome because you can print directly from the browser. In Firefox, Edge, or Safari, you have to download the PDF first, then print.

Reference

- PDF

Step-by-step instructions

- Printing resource payroll checks
- Printing 1099-NEC forms

Picking colors in RB9

Use the RB9's color picker to customize colors to match your needs.

Continued from Job Status Color preferences, Statement preferences, Setting global RB-PDF Transcript 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

- Job Status Color preferences
- Statement preferences
- RB-PDF Transcripts
- RB Connect

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- 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

- RB-PDF Transcripts

Step-by-step instructions

- Adding your company logo to invoices
- Adding your company logo to transcripts
- Branding preferences

Daily Calendar workflows

Follow these Calendar workflows to ensure that you take care of job requests and all of their details.

Reference

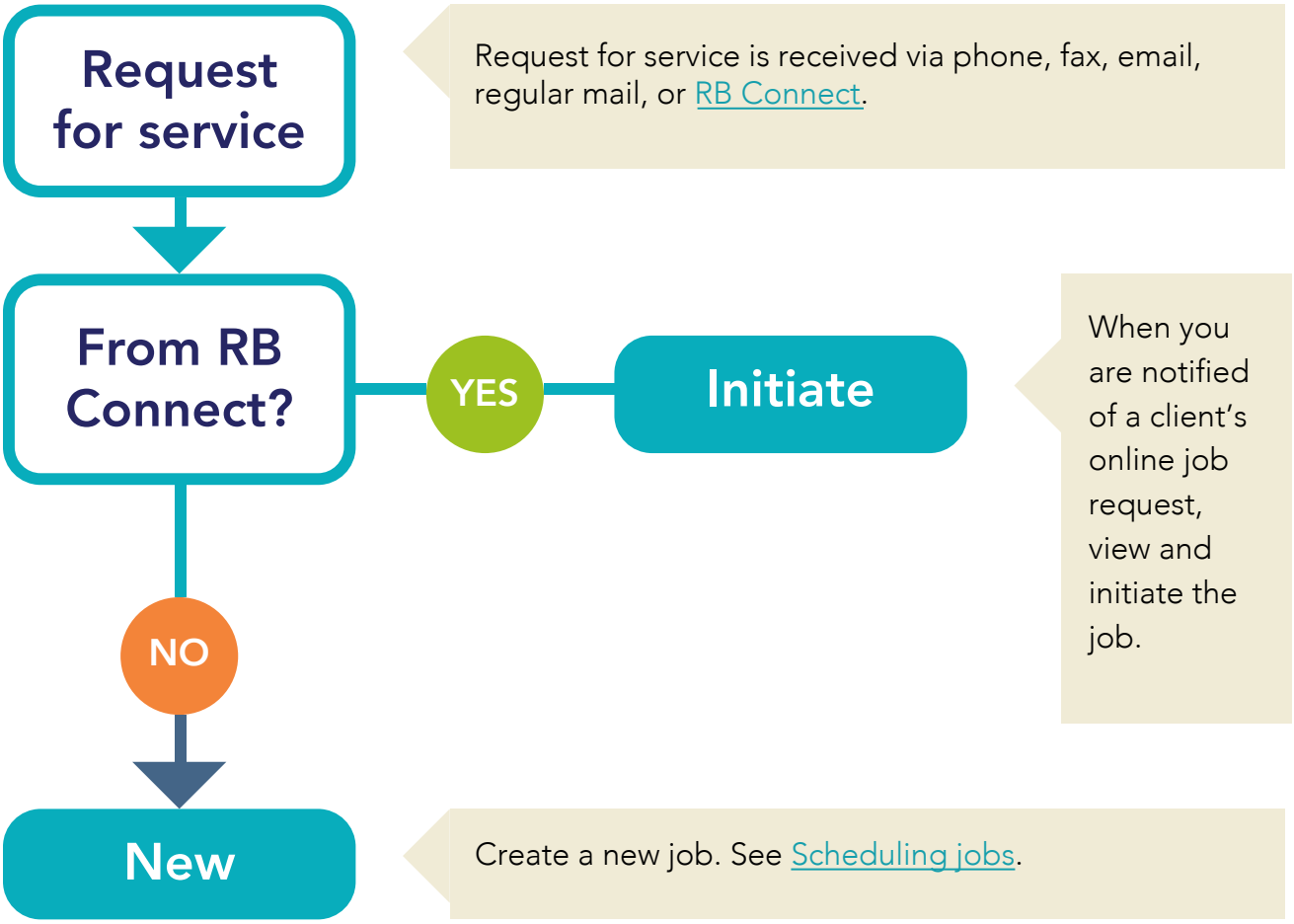
- Jobs

Step-by-step instructions

- Calendar daily procedure 1
- Calendar daily procedure 2
- Calendar daily procedure 3

Calendar daily procedure 1

Job requests can come via several different methods:



NEXT: End-of-day calendar activities

After scheduling jobs, audit your calendar and confirm jobs with clients.

Reference

- Jobs
- RB Connect
- Calendar daily procedure 2
- Calendar daily procedure 3

Step-by-step instructions

- Scheduling jobs

Calendar daily procedure 2

Confirm and verify jobs.

Find out how many jobs been added to the calendar today or this week. Analyze new job settings and cancellations. Also, audit new entries for mistakes and typos.

Send clients acknowledgement of scheduling or cancellation via email.

NEXT: After-confirmation calendar activities

After clients respond to your confirmation notifications, update jobs based on their responses, including assigning resources.

Reference

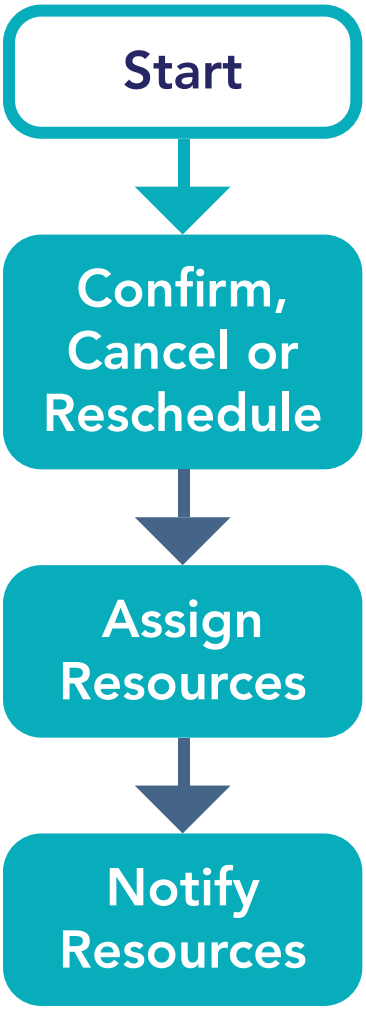
- Daily Calendar Audit
- Send Job Confirmations/Cancellations
- Calendar daily procedure 1
- Calendar daily procedure 3

Step-by-step instructions

- Auditing new and canceled jobs
- Sending job confirmations or cancellations

Calendar daily procedure 3

Follow up on job confirmations, then assign and notify resources.



Based on your clients' responses to job confirmation notices, confirm, cancel or reschedule the next day's jobs.

After a job is confirmed, set up tasks for the job and schedule a resource or resources for the task(s).

After assigning resources, notify them about their assignments.

Reference

- Task definition
- Tasks
- Resources
- Calendar daily procedure 1
- Calendar daily procedure 2

Step-by-step instructions

- Confirming jobs
- Canceling jobs
- Rescheduling jobs
- Entering tasks
- Assigning and pre-assigning resources
- Notifying resources

Case

A **case** in RB9 is a group of depositions and possibly other litigation services that you are providing that all relate to a single legal dispute.

Reference

- Jobs
- Parties
- Cases lists

Step-by-step instructions

- Setting up cases

Searching cases

Find cases directly in your RB9 database using various search criteria. Before entering a case into the database, check to see if it is already there. Find cases to settle. View and update case details, including canceling cases. See if there are duplicate cases that you should merge together.

1. Set search criteria

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

   - **Case Name**
     Enter part of a case's name.
   - **Case No.**
     Enter the entire case number.
   - **Case Type**
     Click to select one or more categories of cases in the Lookup Case Type popup. See Lookup panel. Case types are set up in Lists > Cases.
   - **Case Status**
     Click to select one or more stages of cases in the Lookup Case Status popup. See Lookup panel. Case statuses are set up in Lists > Cases.
   - **Firm**
     Click to restrict search to one firm's cases. See Looking up firms.
   - **Contact**
     Click to restrict search to one contact's cases. See Looking up contacts.
   - **Sales Rep**
     Click to restrict search to cases that are commissionable to a specific sales representative. See Looking up resources.
   - **Client Of**
     Click to restrict search to cases that are commissionable to a specific resource. See Client Of and Looking up resources.
   - **Job Date From/Job Date To**
     Click in these fields to enter a scheduled job date range (see Date Navigator).

- **Job Status**

  Stage the job is in, e.g., New or Cancelled. Default is all except Cancelled. Click to restrict the results (see Lookup panel). Job status options, including color coding, are set in Lists > Jobs.

- **Internal Case No.**

  The number RB9 automatically assigned to the case. Enter the entire number.

2. View results

1. Click . All cases that fit the search criteria appear in the results pane.
2. Click a hyperlinked **Internal Case No.** in the results pane to view details and to:

   - **Update the case**
     See Updating cases.
   - **View/update jobs linked to the case or add jobs to the case**
     Click **More > Jobs (List View)** in the View Case/Edit Case window.
     To add jobs, see Adding jobs to cases.
   - **Settle the case**

     See Settling cases.
   - **Cancel the case**

     See Canceling cases.
   - **Merge cases**
     See Merging data.

TIP: Use shortcuts to save time

Instead of clicking the internal case number, click a case's >

- **View** – To open the case in its View window.
- **Edit** – To open the case in its Edit window.
- **Delete** – To delete the case. In the popup that appears, click **Yes.**

NOTE: Finding cases on the fly

You can look up cases on the fly in any RB9 function with a **Case** field. See Looking up cases.

Reference

- Lookup panel
- Cases lists
- Sales Rep

- Client Of
- Date Navigator
- Historical data saved in a merge

Step-by-step instructions

- Looking up firms
- Looking up contacts
- Looking up resources
- Updating cases
- Adding jobs to cases
- Settling cases
- Canceling cases
- Merging data

Parties

Parties are people or other entities involved in a legal transaction, such as a case or deposition.

NOTE: Parties can be attached to cases or jobs

You can add parties to cases and individual jobs in RB9.

Step-by-step instructions

- Adding parties
- Updating parties
- Setting up cases
- Looking up cases
- Scheduling jobs

Adding parties

You can add parties to cases and jobs. If you enter parties in a case, any new jobs created from that case will automatically include the case parties. If you attach the case to an existing job, the case parties will be automatically added to the job. If you add parties to a case after jobs have been created, you can retroactively add the parties to those jobs.

1. Access case/job

1. If not already in an Edit Case/Edit Job window, find the:
   - Case in **Calender > Cases**
   - Job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)**

   See Searching cases and Searching jobs.
2. In the View Case/View Job window, click **Edit.**
3. Scroll or jump to the **Parties** pane in the Edit Case/Edit Job window.

2. Select client

In jobs, the ordering client is automatically entered in the **Parties** pane when you save the job. If the job is part of a case and you entered the case name in the **Case** field before saving, all case parties are automatically entered in the **Parties** pane too. To update existing parties' information, see Updating parties.

- **To add a party:**

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 RB9.)
3. In the **New Party** panel's **General** pane:
   - **When adding parties to a case,** all contacts in the firm are listed in ***Contacts** *(required).* Check the box(es) to select contact(s) who are associated with the case. (If a contact at the firm is not listed, click ➕ to add the contact. See Adding contacts to RB9.)
   - **When adding parties to a job,** 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 RB9.)

- **To add case parties to existing jobs:**

  In most instances, case parties will be automatically included in jobs linked to the case. However, if parties are added to a case after jobs have been created, RB9 does not add the parties to existing jobs. You can add the case parties to related jobs in 2 ways:

  From within the case party

  Use this method to add a party to all existing jobs in a case.

  1. In an Edit Case window, click the hyperlinked party in the **Parties** pane.
  2. In the **Edit Party** panel, click **More > Add to all linked Jobs.**
  3. RB9 adds the party to existing case jobs. When the operation is complete, click **OK** in the popup that appears.

  From within the job

  Use Prefill to update the list of parties on a single job.

  1. In an Edit Job window, click **> Prefill parties from Case** in the **Parties** pane header. All parties attached to the case in RB9 will automatically be added to the list of parties.
  2. Click **OK** in the popup that appears.

3. ## 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 Case/Edit Job 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.

4. ## Finish adding party

   1. Click **Save >**

      - **Save & Edit –** *(Option when adding parties to a job only.)* 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 case party.

2. RB9 adds the party to the **Parties** pane and adds the **Requested Services** pane to the **Edit Party** panel.

   - **Requested Services**

     To include the party's standing requests, see Selecting preferred or requested services.

3. Click **Save** in the Edit Case window or **Save > Save & Close** in the Edit Job window.

NEXT: Add specialties to jobs

Once you have created a case or job, you can enter information in the Edit Case/Job window in any order, but our recommendation for jobs is to enter any specialties required for the job after entering requested services and before assigning tasks, so they do not get overlooked. See Specialties. If there are no specialties to enter, the next step is entering tasks in jobs.

Reference

- Parties
- Prefill
- Specialties

Step-by-step instructions

- Setting up cases
- Scheduling jobs
- Searching cases
- Searching jobs
- Looking up firms
- Adding firms to RB9
- Adding contacts to RB9
- Updating contacts
- Updating parties
- Entering dates
- Entering general party information
- Entering party billing information
- Selecting preferred or requested services
- Entering tasks

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 and Updating parties.

1. In the **General** pane of the **New Party/Edit Party** panel of an Edit Case/Edit Job 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 drop-down. (If the contact does not exist in your RB9 database, click ▽ **> New Contact.** See Adding contacts to RB9.)

   - **Represent For**
     Which side this party represents (e.g., Plaintiff or Defendant). (Options and default are set up in Lists > Cases.)

   - **Represents**
     Name of the person or group this party represents

   - **Inactive From**
     Case only
     Date the entity stopped being a party to the case

   - **Party Type**
     Default is Unknown (except when creating a job, then default is Ordering Party for the ordering client, Unknown for subsequent parties). Select Ordering Party for your client that is initiating this case/requesting this job. For other parties to the case/job, select Same Side or Opposing Side in relation to the Ordering Party.

   - **Presence**
     Job only
     Default is Unknown. Change to Present or Not Present to record the party's attendance.

   - **Allow case-level repository access**
     Case only
     If Yes is selected, this party will be able to access case-related documents (such as pre-discovery documents) stored in the repository. It is Yes by default.

- **When jobs are created, automatically add to the job parties**
  Case only
  If Yes is selected, this party will appear as party to any jobs created in this case. It is Yes by default.

- **Allow job-level repository access**
  Job only
  If Yes is selected, this party will be able to access job-related documents (such as notices or errata sheets) stored in the repository. It is Yes by default.

- **Show in Turn-in > Prefill**
  Slide to No only if this party will not be billed for a copy. It is Yes by default when adding parties in jobs, No when adding parties to cases.

- **Allow calendar access (not applicable to the scheduling party)**
  If Yes, this party will be able to access the calendar in RB Connect. You should leave this as No unless this party is a co-counsel to the scheduling party or you want to try to win the party's depos on the case.

- **Allow witness-level repository access (not applicable to the ordering parties)**
  If Yes, this party will be able to access witness-related documents (such as transcripts or exhibits) stored in the repository. You should leave this as No unless this party is a co-counsel to the scheduling party.

- **Send a copy when sending confirmation email to the scheduling party**
  If Yes, the party will be included in the Cc field whenever confirmation emails are sent to the scheduling party.

2. To save information:

   - In **Edit Party** panel, click **Save.**

   - In **New Party** panel, click **Save >**

     - **Save & Edit –** *(Option when adding parties to a job only.)* 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 case party.

3. Click **Save** in the Edit Case window or **Save > Save & Close** in the Edit Job window.

Reference

- Parties
- Date Navigator

- Cases lists
- RB Connect

Step-by-step instructions

- Adding parties
- Updating parties
- Looking up firms
- Adding contacts to RB9
- Entering dates
- Selecting 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 and Updating parties.

1. In the **New Party/Edit Party** panel of an Edit Case/Edit Job 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 in the contact's profile. (See Entering contact marketing information.) You can override the default for this case or job by selecting a different Billing Rate Group in the drop-down. (You can also override the Billing Rate Group when invoicing jobs. See Applying rates.)
   - **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, Slide to No and select a different contact from the drop-down.
     - **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 **Edit Party** panel, click **Save.**
   - In **New Party** panel, click **Save >**
     - **Save & Edit –** *(Option when adding parties to a job only.)* 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 case party.

4. Click **Save** in the Edit Case window or **Save > Save & Close** in the Edit Job window.

NOTE: Entering party billing information at turn-in

If you do not have billing information before a job is completed, you can enter it in Turn In when creating invoices. See Adding 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
- Applying rates
- Looking up firms
- Entering electronic billing information
- Adding billing information to invoices

Entering electronic billing information

RB9 Standard only

You can enter e-billing information for a party when adding them to a case or job, 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 a case or job**
     In the **New Party/Edit Party** panel, scroll or jump to **Billing Info** pane.

   - **During Turn In, Export Invoices *(RB9 Standard only)*, or Invoice Inquiry**
     In the **Edit Invoice** panel, scroll or jump to **Additional** pane.

2. Enter/update text or make selections:

   - **Client Matter No.**
     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 RB9. 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 & remarks. 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 **Edit Party/Edit Invoice** panel, click **Save.**

   - In **New Party** panel, click **Save >**

- **Save & Edit –** *(Option when adding parties to a job only.)* 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 case party.

Reference

- Turn In
- Parties
- Date Navigator
- Sold To vs. Bill To
- Electronic billing

Step-by-step instructions

- Adding parties
- Updating parties
- Exporting invoices in LEDES format
- Entering dates
- Customizing notes & remarks
- Adding billing information to invoices

Selecting preferred or requested services

If a party to a case or job has standing requests or has requested specific services for this case/job, you can enter that in their party information to speed up invoice generation later.

Continued from Adding parties or Updating parties.

You have two options when adding services to a party to a case or job:

- **Prefill Services**
  Your client firm/contact's standing requests that have been previously entered in RB9. (See Adding standing requests.)

- **New Requested Services**
  Services requested by a contact for a case or job that are not included in their standing requests.

1. Check for standing requests

When adding services to a party, save time and reduce errors by checking first, so you do not overlook any standing requests.

1. Navigate to the **Edit Party** panel of a party in either a case or a job. (See Adding parties or Updating parties.)
2. Scroll or jump to the **Requested Services** pane.
3. Click **> Prefill Services.**
4. 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 job.
   - In the **Service Item** header to select all the services.
5. Click **Prefill.**

2. Add new requests

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 created in Setup. See Service Item Subgroups and Service Item Master.)

- **Service Subgroup**

  Service Subgroup that contains the service requested

- ***Service Item**

  Required. Service requested.

- **Units**

  Default is "1." Enter a higher number 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 a case, not individual jobs. Default is today. Jobs created from the case going forward from the **Effective From** date will include the requested service.

- **Inactive From**

  Use if a service will no longer be required for jobs in an on-going case. Appears in services for parties to a case, not individual jobs.

- **Delivery Method**

  Requested or expected delivery method. Options are set in Lists > Production.

- **Turnaround Type**

  Requested turnaround time for the requested service. Options are set in Rush Type Master.

- **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.

- **Instruction**

  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** in the **Edit Party** panel.
    2. Click **Save** in the Edit Case window or **Save > Save & Close** in the Edit Job window.

Reference

- Service items
- Service Item Subgroups
- Service Item Master
- Production lists
- Rush Type Master

Step-by-step instructions

- Adding standing requests
- Adding parties
- Updating parties
- Setting up business units

Updating parties

Edit a party's information, add the party to jobs tied to a case, or delete the party from the case.

1. Access case/job

1. If not already in an Edit Case/Edit Job window, find the:

   - **Case**

     Calender > Cases

   - **Job**

     Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)

     See Searching cases and Searching jobs.

2. In the View Case/View Job window, click **Edit.**

2. Update party

1. In the **Parties** pane of an Edit Case/Edit Job 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 Selecting preferred or requested services.

   - **Update a case party's information case-wide**

     Case only

     When updating the general or billing information for a party to a case, or adding services they have requested, click **More > Update to all linked Jobs** to have the new/updated information added to all jobs in the case that they are party to.

   - **Keep the party in the case, but not in future case-related jobs**

     Case only

     Enter the date in **Inactive From,** or click to select the date in the Date Navigator. See Entering dates.

- **Remove the party from the Parties list**

  (Cannot delete a job's Ordering Client.) Click **Delete.** In the popup, click:

  Yes to delete this party from the job, or if in a case, the case and all jobs.

  No to delete this party from the case, but not the jobs. *(Case only)*

- **Add the party to all linked jobs of a case**

  Case only

  Click **More > Add to all linked jobs.** In the popup that appears, click **OK.**

3. ## Save changes

   1. In the **Edit Party** panel, click **Save >**
      - **Save & Edit:** To continue working on the same party.
      - **Save & Close:** If you have no more information to add at this time.
   2. Click **Save > Save & Close** in the Edit Case or Edit Job window.

Reference

- Date Navigator
- Ordering Client

Step-by-step instructions

- Updating cases
- Updating jobs
- Adding parties
- Entering general party information
- Entering party billing information
- Selecting preferred or requested services
- Entering dates

Setting up cases

For managed or larger cases, you can create cases in advance. Or you can add a case on the fly when entering a new job. Jobs can be created when the case is set up or added later. You can add jobs to a case one at a time or in bulk.

1. Start a new case

1. **Calendar > Cases**

   ### TIP: Avoid setting duplicate cases

   Before entering a case into the database, check to see if it is already there. See Searching cases.

2. Click **New.**

2. Enter case name

In the New Case window, only ***Case Name** is required. Enter a brief case name (case nickname or caption). This short case name prints on all documents including confirmations, invoices and reports.

You can enter other information now or later. See Entering general case information.

3. Save case

1. Click **Save >**

   - **Save & Edit:** To enter more case information. The window changes to Edit Case, adds **Delete** button and additional panes, and scrolls to **Parties** pane. See Updating cases.
   - **Save & Close:** If you have no more information to add at this time.

2. Update defaults and enter additional case information now or later:

   - ### General
     To add other case information, see Entering general case information.
   - ### Parties
     To add parties to the case, see Adding parties.
   - ### Repository
     To add files to the case's repository, see Uploading files to a repository.

- **Notes Log**

  To make notes on the case, see Making entries in notes logs.

3. Click **Save** in the Edit Case window again.

NEXT: Add case parties before scheduling jobs

You can enter additional case information at any time, but save time when scheduling jobs by adding case parties to the case before scheduling jobs for the case. Then the parties will automatically appear in jobs scheduled from the case. See Adding parties.

Reference

- Jobs
- Parties

Step-by-step instructions

- Searching cases
- Updating cases
- Entering general case information
- Scheduling jobs
- Adding jobs to cases
- Adding parties
- Uploading files to a repository
- Making entries in notes logs

Scheduling jobs from cases

Jobs can be created as part of a case. Jobs scheduled from a case will automatically include case information including case name, warning, and case parties. You can schedule a single job, or if you have a series of upcoming jobs for a case you can set the jobs all at once.

1. Find the case

1. To find the case you want to schedule jobs for, See Searching cases.
2. To add jobs to a case, click either:
   - The case's **> Edit Case.**
   - The case's hyperlinked **Internal Case No.** Then click **Edit** in the View Case window.
3. Click **More > Create Jobs.**

2. Enter job date(s)

The **Set Job Dates** panel opens automatically. If you are setting:

- **Jobs over multiple dates or multiple appearances on the same date,** see Creating jobs in bulk.
- **A single job,** click **Set Single Job Date.** Then enter the date the job will take place in the ***Job Date** field or click to select date in Date Navigator.

3. Enter required job info

Finish entering required information:

- ***Ordering Firm**

  Required. See Looking up firms.

  Ordering Firm Warning and **Ordering Firm Calendar Notes** come from the ordering firm's entry in Firms.

- ***Ordering Contact**

  Required. From default drop-down of contacts, or click **> New Contact** to add a new contact to the ordering firm (see Adding contacts to RB9).

  Ordering Contact Warning and **Ordering Contact Calendar Notes** come from the ordering contact's entry in Contacts.

- ***Start Time/*End Time**

  Required. Select times in popup lists.

- ***Time Zone**

  Required. Change if the job will take place in a different time zone than your default. Your default time zone is set in User Preferences > Job.

- ***Business Unit**

  Required. Change the default if needed by selecting a different BU in the drop-down. BUs are set in Business Units.

4. ## Enter basic job info (optional)

   You can enter basic job information now, later at your convenience, or as you receive more information. See Entering general job information, Entering ordering client information, Entering job locations, Entering additional job information, and Uploading files to a repository.

5. ## Save job

   1. Click **Save** in the New Job window.
      - Additional job detail panes appear with the **Parties** pane automatically scrolled to the top.
      - Job is assigned a job number.
      - **More** button appears at the top of the window.
   2. Confirm job:
      - **To send a job confirmation immediately,** see Confirming single jobs.
      - **If you prefer to send batch confirmations,** see Sending job confirmations or cancellations.

6. ## Complete job information (optional)

   Update defaults and enter more job information now or later. For instructions for entering information in the additional job detail panes that appeared see Adding parties, Requiring specialties, Awarding job points, Entering tasks, and Making entries in notes logs.

Reference

- Jobs
- Ordering Client

- Firms
- Contacts
- Date Navigator
- Business Units
- Parties
- Specialties
- Award Points
- Tasks
- Jobs lists

Step-by-step instructions

- Searching cases
- Creating jobs in bulk
- Looking up firms
- Adding contacts to RB9
- Customizing job defaults
- Entering general job information
- Entering ordering client information
- Entering job locations
- Entering additional job information
- Uploading files to a repository
- Confirming single jobs
- Sending job confirmations or cancellations
- Adding parties
- Requiring specialties
- Awarding job points
- Entering tasks
- Making entries in notes logs

Updating cases

When adding a case to your RB9 database or at any time later, you can add to or edit the case's information. You can also delete, cancel, or settle the case; or merge the case into another case.

1. Find the case

You can find a case several ways:

- **By searching**

  Calendar > Cases (see Searching cases).

- **View button**

  Click next to a **Case** field in a View Job, Turn In, or Invoice window.

- **When editing a job**

  If a job is tied to the case, click ... > **View Case** next to the **Case** field in the Edit Job window.

2. Update information

1. In the View Case window, click **Edit.**
2. Within an Edit Case window, you can update any information you entered, except notes entered in the Notes Log. They can only be canceled. See Canceling notes.
3. Add to or update:

   - **General**

     For basic case information, such as case name(s), type and warnings or remarks, and to settle or cancel the case, see Entering general case information.

   - **Parties**

     To add parties to the case, see Adding parties. To update an existing party's information, see Updating parties.

   - **Repository**

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

   - **Notes Log**

     To make notes on the case, see Making entries in notes logs.

3. ## Do more

   In the Edit Case window, click **More >**

   - ### Merge To

     To merge the case into another case, saving its historical data. See Merging data.

   - ### Create Jobs

     To create jobs with the case information automatically included. See Scheduling jobs.

   - ### Cancel Jobs

     To cancel one or more jobs associated with the case at once. See Canceling case jobs.

   - ### Jobs (List View)

     To view jobs related to the case. See Searching jobs.

4. ## Save case

   In the Edit Case window, Click **Save >**

   - **Save & Edit:** To continue working on the same case.
   - **Save & Close:** If you have no more information to add at this time.

NOTE: Deleting cases

You can delete any case that does not have jobs attached to it. To delete a case, see Deleting cases.

Reference

- Case
- Notes Log

Step-by-step instructions

- Searching cases
- Entering general case information
- Adding parties
- Updating parties
- Uploading files to a repository
- Making entries in notes logs
- Canceling notes
- Merging data
- Scheduling jobs
- Canceling case jobs
- Searching jobs
- Deleting cases

Adding jobs to cases

You can create jobs from within a case or create jobs separately and attach them to a case at any time. Jobs tied to a case will automatically include case information including case name, warning, and case parties.

- ## Within a case

  To add jobs from within a case, See Scheduling jobs from cases.

- ## From job(s)

  1. In **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View):**
     - Find an existing job to add to a case. See Searching jobs.
     - Click **New** to create new job(s). See Scheduling jobs from scratch.
  2. In the **General** pane of a New Job/Edit Job window, click **Case** field's and find the related case. See Looking up cases.
  3. Click **Save > Save & Close.**

Reference

- Case
- Parties

Step-by-step instructions

- Scheduling jobs from cases
- Searching jobs
- Scheduling jobs from scratch
- Looking up cases

Entering general case information

After entering the required case name (see Setting up cases), you can enter or update case information at any time.

Continued from Setting up cases or Updating cases.

1. In the New Case/Edit Case window, enter text or make selections:

- ***Case Name**
  Required. Brief case name (case nickname or caption). This short case name prints on all documents including confirmations, invoices and reports.

- **Status**
  Default status appears. In a New Case window, **Status** is New and can't be changed.
  - **If a case is settled,** see Settling cases.
  - **If a case is canceled,** see Canceling cases.

  Otherwise, to change the case status, see Changing case or job status.

- **Internal Case No.**
  This number is automatically assigned to the case by RB9 and is not editable.

- **Case No.**
  Case number. RB9 automatically converts all lowercase characters to uppercase when entering the case number.
  RB9 can add the case number to RB-PDF Transcripts *(RB9 Standard only)*.

- **Case Type**
  Category case falls under. (Case types and default are set in Lists.)

- **Trial Date**
  Scheduled date for trial to begin. See Date Navigator.

- **Federal Case**
  If this case will be heard in a federal district court.

- **Court/County**
  Court or county of jurisdiction.

- **Sales Rep**
  Sales representative (account executive) assigned to case. To select a sales rep, click . (See Looking up resources.) RB9's Sales Commission Report uses this field to find commissionable invoices.

- **Client Of**
  Resource who will receive a commission for jobs associated with this case. To select a Client Of resource, click . (See Looking up resources.) If a resource is entered here, Turn In will calculate commissions on case jobs for this resource instead of the Client Of resource listed for the contact. Also, RB9's Sales Commission Report uses this field to find commissionable invoices.

- **Full Case Name**
  Complete case name.

- **Case Warning**
  Text entered here appears on jobs related to the case.

- **Remarks**
  Unlimited character count. Text entered here appears in the View Case/Edit Case windows and on Assignment Notification worksheets sent to resources if this optional field is added to the worksheets in Form Templates. To:

  - Customize the appearance of the remarks, see Customizing notes & remarks.
  - Include boilerplate text set up using Notes Templates, see Adding boilerplate text to remarks & notes.

2. If finished entering case information, click **Save**. Otherwise, to:

   - **Add parties to the case**, see Adding parties.
   - **Update existing parties on the case,** see Updating parties.
   - **Attach jobs to the case,** see Scheduling jobs.
   - **Upload case files,** see Uploading files to a repository.
   - **Include case notes,** see Making entries in notes logs.

Reference

- RB-PDF Transcripts
- Lists
- Date Navigator
- Sales Rep
- Client Of
- Turn In
- Send Assignment Notifications/Cancellations
- Form Templates
- Notes Templates

Step-by-step instructions

- Setting up cases
- Updating cases
- Searching cases
- Settling cases
- Canceling cases
- Changing case or job status
- Entering dates
- Looking up resources
- Customizing notes & remarks
- Adding boilerplate text to remarks & notes
- Adding parties
- Updating parties
- Scheduling jobs
- Uploading files to a repository
- Making entries in notes logs

Adding boilerplate text to remarks & notes

If you have standard information that you add to case remarks or certain types of job notes, instead of typing the same information each time — or copying and pasting the info from a *Word* doc — create templates to fill the fields. Then when adding/editing cases and jobs, you can apply a template, saving time and reducing errors. You can edit the applied template in the case/job fields as needed.

Continued from Entering general case information or Entering additional job information.

- ## In a case

1. In an Edit Case window, click next to **Remarks.**
2. In the **Lookup Notes Templates** panel, any notes templates you have set up for Case Remarks appear in a list. Click the template you want to include.
3. RB9 copies the template into the **Remarks** field. Edit the text as desired.

- ## In a job

1. In an Edit Job window, click next to **Scheduling Notes, Confirmation Notes, Resource Notification Notes,** or **Production/Billing Notes.**
2. In the **Lookup Notes Templates** panel, any notes templates you have set up for the selected notes field appear in a list. Click the template you want to include.
3. RB9 copies the template into the selected field. Edit the text as desired.

TIP: Apply templates first

When you apply a template to a field, it overwrites any information that may already be in the field. So apply the template first, then edit the information in the field and enter any additional text.

Reference

- Notes Templates

Step-by-step instructions

- Entering general case information
- Entering additional job information

Looking up cases

Within a job or as a search filter, find cases in your RB9 database by case name or number.

1. To find a case in a job or as a filter in the **Search By** pane, click or **> Lookup Case** next to a **Case** field.
2. In the Lookup Case popup, select a filter in **Search By:**
   - **Case Name** – Default. Enter part of the case name in **Search Criteria.**
   - **Case No.** – If selected, enter the entire case number in **Search Criteria.**
   - **Internal Case No.** – If selected, enter the number that RB9 automatically assigned to the case in **Search Criteria.**
3. Click . All cases that fit the search criteria appear in the results pane.
4. Click a hyperlinked **Internal Case No.** in the results pane to select the associated case.

NOTE: Search for cases

You can find cases directly using search criteria in **Calendar > Cases.** See Searching cases.

Reference

- Jobs

Step-by-step instructions

- Searching cases

Changing case or job status

RB9 automatically changes the status of a case or job in some instances, such as when a job is turned in. You can update the status of a case or job manually to track its progress and automatically alert other users to a change in status that might require their attention.

1. In the **General** pane of an Edit Case/Edit Job window, current status appears in **Status** field.
2. To update the status, click **>**
   - **Change Status to Confirmed** *(job only)* – For jobs you are confirming.
   - **Change Status to Cancelled** *(job only)* – For jobs you are canceling.
   - **Change Status to Other** *(job only)* – For all other job status changes.
   - **Change Status** *(case only)* – For all case status changes.
3. In the **Change Status** panel if ***Status to be** is blank or incorrect, select the new status from the drop-down *(required).* (Status options and default are set up in Lists > Cases and Lists > Jobs.)
4. Enter any notes about the status change in **Remarks.** Remarks are stored in the Status History log.
5. Click **Save.** If this is a case that you are canceling or settling:
   1. Select today's date or the relevant date in the **Cancel jobs after this date** field to cancel all future jobs scheduled for the case automatically. See Date Navigator.
   2. Check the **Cancel tasks belonging to cancelled jobs** box to have all tasks related to the canceled jobs canceled too.
6. Click **Save** in the Edit Case window or **Save > Save & Close** in the Edit Job window. If you selected Canceled as the new status, see Canceling jobs.

TIP: Change job status from search results

Use a shortcut to change a job's status from the Jobs (List View) main screen: With the job you want to change visible in the results pane of the main screen, click its **>** **Change Job Status.** The Edit Job window for the selected job appears with the **Change Status** panel already open. Follow from step 3 above to change the job's status.

NOTE: New case or job status

In a New Case or New Job window, **Status** is New and can't be changed. Save the case/job first, then change the status.

NOTE: Viewing status history

In an Edit Case/Edit Job 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

- Cases lists
- Lists > Jobs
- Date Navigator
- Jobs (List View)

Step-by-step instructions

- Setting up cases
- Scheduling jobs
- Canceling jobs

Canceling cases

If a case is canceled, not settled, you can note that as the case status so your case history is accurate. If there are any upcoming jobs scheduled, you can cancel them plus any associated tasks when you change the case status.

Continued from Searching cases or Entering general case information.

1. In a View Case window, click **Edit.**
2. In the **Change Status** panel, select Canceled in the ***Status to be** drop-down.
3. Enter notes about the cancellation in the **Remarks** field, if desired.
4. Select today's date or the relevant date in the **Cancel jobs after this date** field to cancel all future jobs scheduled for the case automatically. See Date Navigator.
5. Check the **Cancel tasks belonging to cancelled jobs** box to have all tasks related to the canceled jobs canceled too.
6. Click **Save.**
7. To send cancellation notices about the canceled jobs/tasks to:
   - **Clients** – See Sending job confirmations or cancellations.
   - **Resources** – See Sending batch assignment notifications/cancellations.

Reference

- Jobs
- Tasks
- Date Navigator

Step-by-step instructions

- Searching cases
- Entering general case information
- Sending job confirmations or cancellations
- Sending batch assignment notifications/cancellations

Deleting cases

You can delete any case that does not have jobs attached to it. If there are jobs attached to the case, remove them from the case. Then you can delete the case from your RB9 database.

1. To delete a case:
   - **From the Cases main screen,** find the case you want to delete (see Searching cases) and click its **> Delete.**
   - **In a View Case/Edit Case window**, click **Delete.**
2. Click **Yes** in the popup that appears. If there are:
   - **No jobs attached to the case,** the case will be deleted.
   - **Jobs attached to the case,** a popup will appear telling you the case cannot be deleted because it has jobs tied to it. Click **OK.** To remove the jobs, see Removing jobs from cases. When there are no jobs attached to the case, click **Delete** in the View Case/Edit Case window again.

Reference

- Case
- Jobs

Step-by-step instructions

- Searching cases
- Updating cases
- Removing jobs from cases

Removing jobs from cases

If a job is attached to the wrong case or you want to delete a case but there are jobs attached to it, you can remove jobs one by one from a case.

1. Find the case you want to remove job(s) from (see Searching cases) and click the case's ▽ **> Edit** or its hyperlinked **Internal Case No.**
2. In the View Case/Edit Case window of the case you want to remove jobs from, click **More > Jobs (List View).**
3. In the Jobs (List View) window, all jobs attached to the case are listed. To update a job, click its:
   - ▽ **> Edit**.
   - Hyperlinked **Job No.** then click **Edit** in the View Job window.
4. In the **General** pane of the Edit Job window, click the **Case** field's ▽ **> Remove Case.**
5. Click **Save > Save & Close.**
6. Repeat steps 3–5 for any other jobs in the list you want to decouple from the case.
7. When finished, close the Jobs (List View) window.

NOTE: Jobs cannot be deleted in RB9

To maintain a proper audit trail jobs in RB9 cannot be deleted. If you want to cancel jobs associated with a case, see Canceling case jobs.

Reference

- Case
- Jobs

Step-by-step instructions

- Searching cases
- Deleting cases
- Canceling case jobs

Viewing job calendars

You can view scheduled jobs in 3 different displays — as a list, a monthly calendar, or a week-by-week format — and restrict which jobs are shown by using search filters.

- To see your job calendar in a grid and have the most search options, see Viewing job calendar as a list.
- To see jobs in a month-by-month calendar with brief descriptors of the jobs, and to locate jobs quickly when clients call inquiring about a job by date, see Viewing monthly job calendars.
- To see a week's worth of jobs at a time with brief descriptors of the jobs, see Viewing job calendar week by week.

Reference

- Jobs
- Jobs (List View)
- Jobs (Monthly View)
- Jobs (Weekly View)

Step-by-step instructions

- Viewing job calendar as a list
- Viewing monthly job calendars
- Viewing job calendar week by week
- Searching jobs

Viewing job calendar as a list

Use List View to see your job calendar in a grid. Listings are color coded based on their job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.)

List View advantages:

- Displays more information about the jobs at the top level without clicking into each job's details.
- Gives you the most search options.
- Grid layout is customizable, including the ability to group results by column. See Customizing grids and Grouping results.
- Includes shortcuts to most-used Jobs areas/operations.

1. Use search criteria to find jobs. See Searching jobs.
2. Click on any hyperlinked job number to open the job detail window (see Updating jobs).
   Or use shortcuts: Click >
   - **View** – Gives the same result as clicking the hyperlinked text in the row.
   - **Edit** – To open the result directly in its Edit window.
   - **Send Job Confirmation** – To send the client email confirmation of their job request. See Confirming single jobs.
   - **Change Job Status** – To update the status of the job. See Changing case or job status, starting with step 3.
   - **Resource Blast** – To send email and text-message blasts about last-minute jobs to reporters and other resources instantly. See Sending urgent requests for help.
   - **Send Assignment Notifications** – To notify resources of assignments related to the job. See Sending batch assignment notifications/cancellations.

TIP: Find jobs by job number

If you want to search your calendar by job number, job date or witness, use List View.

Reference

- Jobs
- Job Status Color preferences
- Jobs (Monthly View)
- Jobs (Weekly View)

Step-by-step instructions

- Viewing job calendars
- Customizing grids
- Grouping results
- Searching jobs
- Updating jobs
- Confirming single jobs
- Changing case or job status
- Sending urgent requests for help
- Sending batch assignment notifications/cancellations
- Viewing monthly job calendars
- Viewing job calendar week by week

Viewing monthly job calendars

Use Monthly View to see jobs in a month-by-month calendar with brief descriptors of the jobs. A bar at the bottom of each day's box lists the total settings/cancellations for the day. Listings are color coded based on their job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.)

1. Monthly View defaults to all jobs for the current month. Today's date has a gray background to highlight it. If your screen is smaller than the calendar view, it will automatically be scrolled down to show today's date. Use search criteria to restrict the view/find jobs. See Searching jobs.
2. Roll over a job listing to pop up additional job information.
3. Click on the job listing to open the job detail window (see Updating jobs).
4. To view more information in Monthly View:
   - Click on the bar at the bottom of a day's box to pop up a window listing all of the day's jobs in a Jobs (List View) format. Like List View, the popup window dynamically sizes itself to the underlying window, and is maximized in size so you can see more with less scrolling. To close the popup click the x in the top right of the window.
   - Page back and forth through months by clicking ◂ or ▸ at the top of the calendar.
   - Jump to a particular month by clicking the month name and selecting a new month in the Date Navigator.
   - Return to the current month by clicking **Today.**
   - If the whole monthly calendar is not visible, use the scroll bars to view hidden sections. Or click **Today** to automatically scroll the current calendar page to today's date. The top navigation bar stays visible when scrolling a calendar page vertically so you can easily see the month and year and navigate to other calendar pages.

NOTE: Monthly View customization

You can customize what identifying information appears in the job descriptions, and set a maximum number of jobs to display per day in System Preferences > Calendar > Jobs (Monthly View).

TIP: Find a job by date

Use Monthly View to locate jobs quickly when clients call inquiring about a job by date.

Reference

- Jobs
- Jobs (List View)

- Jobs (Weekly View)
- Job Status Color
- Date Navigator
- Jobs (Monthly View) preferences

Step-by-step instructions

- Viewing job calendars
- Searching jobs
- Updating jobs
- Canceling jobs
- Viewing job calendar as a list
- Viewing job calendar week by week

Viewing job calendar week by week

RB9 Standard only

Use Weekly View to see a week's worth of jobs at a time with brief descriptors of the jobs. Each day's header includes the date, day of the week, and the total number of jobs scheduled and canceled for that day. Listings are color coded based on their job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.)

1. Weekly View defaults to all jobs for the current week. Use search criteria to restrict the view/find jobs. See Searching jobs.
2. Roll over a job listing to pop up additional job information.
3. Click on the job listing to open the job detail window (see Updating jobs).
4. To view more information in Weekly View:
   - Page back and forth through weeks by clicking ◂ or ▸ at the top of the calendar. Return to the current week by clicking **Today.**
   - Jump to a particular week by clicking 📅 and selecting a new date in the Date Navigator.
   - If the whole week is not visible, use the scroll bars to view hidden sections.

NOTE: Weekly View customization

Each job listing shows its start time and job number and a third description of your choice. You can also set the height of the weekday boxes in job listing rows (from 5 to 15 rows). Both preferences are set in System Preferences > Calendar > Jobs (Weekly View).

TIP:

Use Weekly View to quickly see your current week's job settings without having to set search criteria.

Reference

- Jobs
- Jobs (List View)
- Jobs (Monthly View)
- Job Status Color
- Date Navigator
- Jobs (Weekly View) preferences

Step-by-step instructions

- Viewing job calendars
- Searching jobs
- Updating jobs
- Canceling jobs
- Viewing job calendar as a list
- Viewing monthly job calendars

Searching jobs

Find jobs directly in your RB9 database using various search criteria. View job details and update information.

1. Set search criteria

1. **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)** (See Viewing job calendars.)
2. In the **Search By** pane, no specific filter is required, but you must use at least one of the search filters:

   - **Job No.**

     List View only
     Enter the entire job number.

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

     List View only
     Default is tomorrow's date. Click in these fields to enter a scheduled job date range (see Date Navigator).

   - **Party Type**

     Ordering Party is the default. To search by another party to the job, select Other Party in the drop-down.

   - **Ordering Firm/Other Firm**

     Click to restrict search to one firm's jobs in the Lookup Firm popup. See Looking up firms.

   - **Ordering Contact/Other Contact**

     Click to restrict search to one contact's jobs in the Lookup Contact popup. See Looking up contacts.

   - **Scheduled By**
     Click to restrict search to jobs scheduled by a single contact in the Lookup Contact popup. See Looking up contacts.

   - **Job Status**

     Stage the job is in, e.g., New or Cancelled. Default is all except Cancelled. Click to restrict the results (see Lookup panel). Job status options, including color coding, are set in Lists > Jobs.

TIP: Check for online job requests

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

- **Job Type**

  Categories of jobs requested by clients. Default is ALL. Click ▣ to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

- **Witness**

  List View only

  Enter part of a deponent's name.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click ▣ to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

- **Sales Rep**

  Click ▣ to restrict search to jobs that are commissionable to a specific sales representative in the Lookup Resource popup. See Looking up resources.

- **Case**

  To select a case, see Looking up cases.

- **Case Type**

  Click ▣ to select one or more categories of cases in the Lookup Case Type popup. Case types are set up in Lists > Cases.

- **Parent Firm**

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

TIP: Viewing jobs 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 the job calendar by the parent firm and see all of the related offices' jobs in one calendar. See Adding firms to RB9.

- **Job Location**

  Enter part of the location name for the job location.

- **Job Location City**

  Enter part of the city name for the job location.

- **Job Location State**

  Default is ALL. Click to restrict the search to specific states (see Searching in RB9).

- **Job Entered From/Job Entered To**

  List View only
  Click in these fields to enter a date range for when jobs were entered into the calendar (see Date Navigator).

- **Notation**

  List View only
  (24-character limit) Your own shorthand codes, such as "V" (for video), "RT" (for realtime), "1 of 2," or "Daily," that you enter in jobs so you can see this information in the results grid at a glance.

2. View results/use shortcuts

1. Click . All jobs that fit the search criteria appear in the results pane/monthly calendar/week at a glance color coded for job status.

   - **In List View,** results grid is customizable (see Customizing grids and Grouping results). See Viewing job calendar as a list for more information about List View.
   - **In Monthly View,** click the bar at the bottom of a day's box to see the complete list of jobs for that day in a results grid like List View. The Day View grid is customizable. See Viewing monthly job calendars for more information about Monthly View.
   - **In Weekly View,** vertical scroll bars appear where a day's list of jobs is longer than the Display Height selected in System Preferences > Calendar > Weekly View. See Viewing job calendar week by week for more information about Weekly View.

2. Click a hyperlinked job to view details.

   Or use shortcuts in Jobs (List View): Click the job's >

   - **View** – To open the job in its View window. To update the job, see Updating jobs.
   - **Edit** – To open the job in its Edit window. To update the job, see Updating jobs.
   - **Send Job Confirmation** – To confirm the job with the client. See Confirming single jobs.
   - **Change Job Status** – To update the job's status. See Changing case or job status, starting with step 3.

Resource Blast – To send email and text-message blasts about last-minute jobs to resources instantly. See Sending urgent requests for help.

Reference

- Jobs (List View)
- Jobs (Monthly View)
- Jobs (Weekly View)
- Date Navigator
- Ordering client
- Lookup panel
- Jobs lists
- RB Connect
- Business Units
- Cases lists
- Sales Rep
- Parent firms
- Job Status Color
- Weekly View preferences

Step-by-step instructions

- Viewing job calendars
- Viewing job calendar as a list
- Viewing monthly job calendars
- Viewing job calendar week by week
- Looking up firms
- Looking up contacts
- Looking up resources
- Looking up cases
- Searching in RB9
- Scheduling jobs
- Customizing grids
- Grouping results
- Updating jobs
- Confirming single jobs
- Changing case or job status
- Canceling jobs
- Sending urgent requests for help

Scheduling jobs

You can set up a job with only the ordering client, job date and time. If and when you have additional information, you can enter it in the job.

Jobs can be created as part of a case, copied from an existing job, started from scratch, added from a client's online request, or linked with another job. If you create jobs from within a case or link them to a case later, they automatically includes case information, such as case name, warning, and parties.

You can schedule a single job, or if you have a series of upcoming jobs for a case or single client, you can set the jobs all at once.

Start a new job

You can start a new job or series of jobs in several ways:

- ### From a case

  If the job or jobs are part of a case, see Scheduling jobs from cases.

- ### From a job

  You can copy job information for a new job or create a linked job.

  Open the job you want to copy or create a linked job to (see Searching jobs).

  - **To copy a job:** In the Edit Job window, click **More > Copy Job.** RB9 creates the new job by copying all of the job information, except for the job date and the **Location for Remote Participants** fields if the original job includes Zoom meeting information. Enter the new job date (see Date Navigator) and update job information as needed. See Updating jobs and Scheduling Zoom meetings.

  - **To create a linked job:** See Creating linked jobs.

- ### From scratch

  To start jobs that are not related to a case or an existing job, see Scheduling jobs from scratch.

- ### From an RB Connect request

  See Scheduling jobs from online requests.

Reference

- Jobs
- Ordering Client
- Linked Jobs

Step-by-step instructions

- Scheduling jobs from cases
- Searching jobs
- Updating jobs
- Scheduling Zoom meetings
- Creating linked jobs
- Scheduling jobs from scratch
- Scheduling jobs from online requests
- Creating jobs in bulk

Scheduling jobs from scratch

If you are scheduling jobs that are not part of a case, similar to an existing job, or linked to another job, you must start from scratch. You can set jobs with only the ordering client, job date, and time. If and when you have additional information, you can enter it in the job.

You can schedule a single job, or if you have a series of upcoming jobs you can set the jobs all at once.

1. Start a new job

- In **Calendar > Jobs (List View)** or **Jobs (Monthly View**) or **Jobs (Weekly View),** click **New.**

2. Enter required job info

1. The **Lookup Firm** panel opens automatically. Select the ordering firm (see Looking up firms).

   NOTE: Overdue amount alerts

   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.

2. In New Job window's **Ordering Client** pane, **Ordering Firm Warning** and **Ordering Firm Calendar Notes** come from the selected ordering firm's entry in Firms.

   Select:

   - ***Ordering Contact**

     Required. From default drop-down of contacts, or click ⊕ **> New Contact** to add a new contact to the ordering firm (see Adding contacts to RB9).

     Ordering Contact Warning and **Ordering Contact Calendar Notes** come from the ordering contact's entry in Contacts.

   NOTE: C.O.D. clients

   COD next to a Firm or Contact label indicates a COD (Cash on Delivery) client.

3. In the **General** pane, enter:

   - ***Job Date**

     Required.

- **If this is a single job,** enter the date the job will take place in the field or click to select date in Date Navigator.
- **If this is a job with multiple dates or multiple appearances on the same date,** see Creating jobs in bulk.

- ***Start Time/*End Time**

  Required. Select times in popup lists.

- ***Time Zone**

  Required. Change if the job will take place in a different time zone than your default. Your default time zone is set in User Preferences > Job.

- ***Business Unit**

  Required. Change the default if needed by selecting a different BU in the drop-down. BUs are set in Business Units.

- **Status**

  Default is New and cannot be changed until you save the job.

3. ## Enter basic job info (optional)

   You can enter basic job information now, later at your convenience, or when you receive more information.

   - **Ordering Client**

     To update the **Ordering Client** pane, see Entering ordering client information.

   - **General**

     To enter basic job information, such as the witness and job type, see Entering general job information.

   - **Job Location**

     To designate the job's location, see Entering job locations.

   - **Additional**

     To enter miscellaneous information, see Entering additional job information.

   - **Repository**

     To upload files, see step 2 of Uploading files to a repository.

   NOTE: Avoid rekeying information when entering multiple jobs

   If you are using **Set Multiple Job Dates** and have basic job information that will be the same for all of these jobs, such as job location, enter the details before saving the job. See Creating jobs in bulk.

4. Save job

1. Click **Save** in the New Job window. *(If you used **Set Multiple Job Dates,** identical jobs are created for the specified dates, and the first job is opened.)*
   - Additional job detail panes appear with the **Parties** pane automatically scrolled to the top.
   - Job is assigned a job number.
   - **More** button appears at the top of the window.
2. Confirm job:
   - **To send a job confirmation immediately,** see Confirming single jobs.
   - **If you prefer to send batch confirmations,** see Sending job confirmations or cancellations.

5. Complete job information (optional)

Update defaults and enter more job information now or later:

- **Parties**

  Ordering firm is automatically entered under Parties. To add parties to the job, see Adding parties.

- **Specialties**

  If a job requires special skills, such as Medical or Realtime, see Requiring specialties.

- **Award Points**

  If you offer reward points for job bookings, see Awarding job points.

- **Tasks**

  Default task appears (default is set in Lists > Jobs). To update the default or add parts of the job that require separate resources, see Entering tasks.

- **Notes Log**

  To make notes on the job, see Making entries in notes logs.

TIP: Attach job to a case to include case information
You can attach the job to a case later to have it automatically include case information. See Adding jobs to cases.

NEXT: Confirm job with client
Verify that you have entered your client's request correctly into RB9 by sending them a job confirmation email. You can send job confirmations as you schedule jobs (see Confirming single jobs), or send a day's worth at once (see Sending job confirmations or cancellations).

Reference

- Jobs
- Ordering Client
- Linked Jobs
- Firms
- Contacts
- Date Navigator
- Business Units
- Parties
- Specialties
- Award Points
- Tasks
- Jobs lists

Step-by-step instructions

- Looking up firms
- Adding contacts to RB9
- Creating jobs in bulk
- Customizing job defaults
- Entering ordering client information
- Entering general job information
- Entering job locations
- Entering additional job information
- Uploading files to a repository
- Confirming single jobs
- Sending job confirmations or cancellations
- Adding parties
- Requiring specialties
- Awarding job points
- Entering tasks
- Making entries in notes logs
- Rescheduling jobs
- Viewing job calendars
- Canceling jobs

Scheduling jobs from online requests

RB9 Standard only

If you offer clients the ability to schedule jobs online through RB Connect, RB9 will automatically assign them job numbers and import the information submitted with the job request. Review the information submitted, add your own information, and update the job's status.

1. View job request

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 job request.
3. In the Message–New Job(#...) window, click the assigned **Job No.**

   NOTE: Find requests from your calendar

   You can also find online job requests in your Jobs calendar. Select Request New, Request Confirm, and Request Cancel in **Job Status** to see any client online requests. See Searching jobs.
4. In the View Job window, the job information submitted by the client through RB Connect appears and the job's **Status** is Request New. Click **Edit.**

2. Update status & other information

1. In the popup that appears, click **Yes** to automatically open the **Change Status** panel with ***Status to be** already set to New. Click **Save** or see Changing case or job status.
2. If you have added a custom data section to your RB Connect in Connect Preferences (see Adding custom sections to online forms), scroll or jump to the **Custom Data** pane in the Edit Job window to see what instructions/information the client has sent. The fields in this section are uneditable.
3. To update other information, see Updating jobs.

3. Save & confirm job

1. Click **Save > Save & Edit.**
2. Confirm the job settings with your client by sending them a job confirmation email. See Confirming single jobs. (If you prefer to send batch confirmations, see Sending job confirmations or cancellations.)

3. Click **Save > Save & Close.**

Reference

- RB Connect
- Connect Preferences

Step-by-step instructions

- Searching jobs
- Changing case or job status
- Adding custom sections to online forms
- Updating jobs
- Confirming single jobs
- Sending job confirmations or cancellations

Creating linked jobs

When scheduling a videotaped deposition in RB9, if you don't want to use tasks in a single job for these different services, create the video job as a linked job to the depo job. Then, if the depo is canceled or rescheduled, you will be reminded of the linked video job.

1. If you are not already in the job you want to create a linked job for, find the job (see Searching jobs).
2. In the View Job window, click **Edit.**
3. In the Edit Job window, click **More > Create Linked Job.**
4. R9B copies the existing job to create the new job and automatically opens the new job. It does not copy any tasks that were defined in the original job. It records the original job's job number in **Linked Job** (and records the new job's job number in the original job's **Linked Job).** Make any necessary changes, such as **Job Type.** See Updating jobs.
5. Click **Save > Save & Close** in the new linked job's Edit Job window.

BEST PRACTICES: Link related jobs

Although you can create a video job separate from its depo job by simply copying the depo job and changing its Job Type to Video, we do not recommend it because the two jobs will have no relationship to each other in RB9. It's better to create them as linked jobs, so if the status of one changes, you are notified of the other dependent job and can make changes as needed.

Another option is to set up one job with multiple tasks.

Reference

- Tasks

Step-by-step instructions

- Searching jobs
- Updating jobs
- Entering tasks
- Canceling jobs

Linked Jobs

It is a common practice in the court reporting industry to schedule a videotaped deposition as two separate jobs on the calendar. This allows you to cancel one job without canceling the other, and to bill video charges on a separate invoice by an outside vendor. In RB9, create **linked jobs** for this situation instead of separate tasks on the same job. You will be notified when you confirm or cancel a depo that there is a linked video job.

Reference

- Jobs
- Tasks

Step-by-step instructions

- Creating linked jobs
- Canceling jobs

Updating jobs

When adding a job to your RB9 database or at any time later, you can add to or edit the job's information.

1. Find the job

You can find a job several ways:

- ### From a job calendar

  Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View) (see Searching jobs).

- ### From a case

  If the job is part of a case, open the case (see Searching cases). In the View Case window, click **More > Jobs (List View).** All jobs tied to the case appear in the **Jobs (List View)** panel. Click the hyperlinked **Job No.**

- ### From a detail window

  Click next to a **Job No.** field.

- ### From a results grid

  In any results grid that includes hyperlinked job numbers, click the hyperlinked **Job No.**

2. Update information

1. In the View Job window, click **Edit.**

   ### NOTE: Simple job request confirmation

   When you click **Edit** on a job with a **Status** of Request New (job requested by client through RB Connect), a popup appears asking if you want to change the job status to New. Click **Yes** to automatically open the **Change Status** panel with ***Status to be** already set to New. See Changing case or job status.

2. Within an Edit Job window, you can update any information you entered, except:

   - ### Job Date

     If the job date changes, reschedule the job. See Rescheduling jobs. If the job is canceled, see Canceling jobs.

   - ### Notes Log

     Notes entered in the Notes Log can only be canceled. See Canceling notes.

3. Add to or update:

   - **General**

     To update basic job information, such as the witness and job type, see Entering general job information.

   - **Ordering Client**

     To update information about the ordering/scheduling client(s), see Entering ordering client information.

   - **Job Location**

     To update the job's location, see Entering job locations.

   - **Additional**

     To enter miscellaneous information, see Entering additional job information.

   - **Parties**

     To add parties to the job, see Adding parties. To update existing parties to the job, see Updating parties.

   - **Specialties**

     If a job requires special skills, such as Medical or Realtime, see Requiring specialties.

   - **Award Points**

     If you offer reward points for job bookings, see Awarding job points.

   - **Tasks**

     To update the default task or add parts of the job that require separate resources, see Entering tasks.

     To enter resources' assignment acknowledgements, see Logging resources' acknowledgements.

   - **Repository**

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

   - **Notes Log**

     To make notes on the job, see Making entries in notes logs.

4. Click **Save > Save & Close** in the Edit Job window.

TIP: Turn in jobs from job detail window

You do not have to go to the Turn In function in the Production module to begin job turn in if you are already in a View Job/Edit Job window. Click **More > Turn In** at the top of any job detail window to begin turning in that job. See Generating invoices.

Reference

- RB Connect
- Notes Log
- Award Points
- Turn In

Step-by-step instructions

- Searching jobs
- Searching cases
- Scheduling Jobs
- Rescheduling jobs
- Canceling jobs
- Canceling notes
- Entering general job information
- Entering ordering client information
- Entering job locations
- Entering additional job information
- Adding parties
- Updating parties
- Requiring specialties
- Awarding job points
- Entering tasks
- Logging resources' acknowledgements
- Uploading files to a repository
- Making entries in notes logs
- Generating invoices

Ordering Client

An **ordering client** is the firm and the contact at that firm who is responsible for a job with your company. Ordering firms and contacts can be different from scheduling firms and contacts.

Reference

- Jobs
- Scheduling Client

Step-by-step instructions

- Scheduling jobs

Scheduling Client

A **scheduling client** is the firm and the contact at that firm who initiates a job with your company. Both the scheduling firm and contact can be different from the ordering firm and contact on a job.

Reference

- Jobs
- Ordering Client

Step-by-step instructions

- Scheduling jobs

Requiring specialties

If a job requires specific expertise, add that specialty to the job before assigning resources. That way, when you assign resources, the specialty will be included in the search criteria for available resources so you can assign resources more accurately.

1. Access a job

1. If not already in a New Job/Edit Job window, find the job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)** and open the job. See Searching jobs.
2. In the View Job window, click **Edit.**
3. Click **Edit Job > Specialties.**

2. Add specialties

1. Click in the **Specialties** pane.
2. In the **Add Specialties** panel, check the requested specialties.
3. Click **Save.** (To manage specialties, see **Lists > Resources.)**

NOTE: Removing specialties

To remove a specialty from a job, check its box, then click .

NEXT: Set up tasks for the job

Any specialties added in the **Specialties** pane will appear in the **Assign Resource** panel of tasks in the job to restrict the list of available resources to those that include the requested specialties. See Entering tasks.

References

- Specialties
- Jobs lists
- Billing Rates
- Jobs
- Parties
- Specialties
- Tasks

Step-by-step instructions

- Scheduling jobs
- Searching in RB9
- Sending job confirmations or cancellations
- Entering job locations
- Entering general job information
- Adding parties
- Updating parties
- Requiring specialties
- Awarding points
- Entering tasks
- Uploading repository files
- Entering notes
- Changing case or job status
- Rescheduling jobs
- Viewing job calendars
- Assigning resources

Awarding job points

Track individual contacts' activity with your firm & reward them with redeemable points. (If you have not already designated which services are "pointable," i.e. earn points, see Entering billing & pay rates.)

1. Access a job

1. If not already in a New Job/Edit Job window, find the job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)** and open the job. See Searching jobs.
2. In the View Job window, click **Edit.**

2. Update award points

1. In a New Job/Edit Job window, scroll or jump to the **Award Points** pane.
2. Click **> Prefill Award Points from Ordering Contact** to automatically ensure that your ordering contact has the correct amount of points awarded for this job. See Managing contacts' award points.
3. If Prefill did not add any points, click .
4. In the **Add Award Points To** panel, check the box for the contact(s) to award points to for this job.
5. To change the amount of points awarded for this job, enter a number in the **Multiply By** field.
6. Click **Save** in the **Add Awards Point To** panel.

TIP: Give contacts access to points online

If you have RB Connect, give clients the ability to check and redeem their points online (see Fulfilling online reward point requests). Access is by individual contact. Turn on a contact's access by checking the **Show Reward Points menu on Connect** box in their Edit Contact window's **Award Points** pane. See Managing contacts' award points.

Reference

- Award Points
- Billing preferences
- Others lists
- RB Connect

Step-by-step instructions

- Entering billing & pay rates
- Searching jobs
- Managing contacts' award points
- Fulfilling online reward point requests

Entering general job information

While you must enter required job information *(designated by * in RB9)* before saving a new job, you can enter other information, such as witness names, at any time. You can update any information in a job except its date and entries in its Notes Log.

1. Access a job

1. If not already in a New Job/Edit Job window, find the job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)** and open the job. See Scheduling jobs or Searching in RB9.
2. In the View Job window, click **Edit.**

2. Enter information

In a New Job/Edit Job window, scroll or jump to the **General** pane. You can update previously entered information, except **Job Date** (see Rescheduling jobs), and enter additional information/make selections:

- **Status**

  To cancel a job or otherwise change its status manually, see Changing case or job status.

- ***Start Time/*End Time**

  Required. Job time range.

  NOTES: Changing job times affects task times, Zoom meeting times

  Tasks tied to a job can have different start/end times than the job. If a task time is different from the job time and you change the job time the system will display an alert to manually change the task time. See Entering tasks.

  If you change the start or end time of a job that includes a Zoom meeting, the corresponding Zoom meeting time will also be automatically updated to the new job time.

- **Adjust clock for daylight saving changes**

  Slide to Yes so that emailed confirmations and/or worksheets will have the correct time in the attached *Outlook* .ics file.

  NOTE:

  When Arizona is selected as the **Time Zone,** the **Adjust clock for daylight saving changes** option is disabled.

***Time Zone**

Required. Change if the job will take place in a different time zone than your default. Your default time zone is set in User Preferences > Job.

- ***Business Unit**

  Required. Change if a business unit other than the default is responsible for this job. BUs, including the default, are set in Business Units.

- **Witness**

  Witness's name. If you have more than one witness being deposed, you can either enter all of their names in one job, separated by commas, or create multiple jobs, one for each witness.

- **Expert Type**

  If applicable, the witness's expertise. Types of witness expertise are set in Lists > Jobs.

- **Subpoenaed Witness**

  Slide to Yes if witness has been summoned to appear.

- **Job Type**

  Category of jobs requested by clients. Job types are set in Lists > Jobs.

- **Case**

  If the job is part of an ongoing case, see Looking up cases.

3. ## Save job

You can continue entering information in other panes in the New Job/Edit Job window including uploading files to the repository. Before leaving the job, save your entries:

- In the New Job window, click **Save.** The window changes to Edit Job and additional job detail panes appear with the **Parties** pane automatically scrolled to the top. You can continue entering information in the new panes or click **Save > Save & Close**.
- In the Edit Job window, click **Save > Save & Edit** to continue entering information or **Save > Save & Close** to exit the job.

NOTE: All required info must be entered before a job can be saved

If you are entering a new job and not just updating job information, you must also enter the ordering client information in the **Ordering Client** pane before you can save the job. Once you have set a job with its required information, you can enter other information you have for the job in any order. For instructions for the **Ordering Client** pane, see Entering ordering client information.

NEXT: Enter location (suggested)

Once you have set a job with its required information, you can enter other information you have for the job in any order. For instructions for the next pane, see Entering job locations.

Reference

- Jobs
- Notes Log
- Business Units
- Jobs lists
- Parties
- Specialties
- Tasks

Step-by-step instructions

- Scheduling jobs
- Searching in RB9
- Rescheduling jobs
- Changing case or job status
- Entering tasks
- Customizing job defaults
- Looking up cases
- Entering ordering client information
- Uploading repository files
- Entering job locations
- Entering additional job information
- Adding parties
- Updating parties
- Requiring specialties
- Awarding points
- Entering notes

Entering job locations

Depositions can take place in a court room, a law firm's office, your own conference room, another location, or online via Zoom. If you have a hybrid meeting with some attendees in the same location and others participating via Zoom you can include that dual information here. You can enter locations manually, but you can save time and reduce errors if you select locations from your RB9 database.

1. Access a job

1. If not already in a New Job/Edit Job window, find the job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)** and open the job. See Searching jobs.
2. In the View Job window, click **Edit.**
3. Click **Edit Job > Job Location.**

2. Select location type & enter information

If the job location is:

- **In-person meeting,** see Setting up in-person meetings.
- **Zoom meeting,** see Scheduling Zoom meetings.
- **Hybrid,** follow instructions for both in-person meetings and Zoom meetings.

3. Save job

- In the New Job window click **Save.**
- In the Edit Job window click **Save > Save & Close.**

IMPORTANT: If you schedule Zoom meetings via RB9 notification forms must include hybrid info

If you schedule Zoom meetings via RB9 your notification forms must include both physical location and Zoom meeting fields so Zoom meeting details are included in Job Confirmations/Cancellations and Assignment Notifications/Cancellations. See Updating forms for hybrid job locations.

NEXT: Enter additional job information (suggested)

Once you have set a job with its required information, you can enter other information you have for the job in any order. For instructions for the next pane, see Entering additional job information.

Reference

- Jobs

Step-by-step instructions

- Scheduling jobs
- Searching jobs
- Setting up in-person meetings
- Scheduling Zoom meetings
- Updating forms for hybrid job locations
- Entering general job information
- Entering ordering client information
- Entering additional job information
- Uploading repository files
- Adding parties
- Updating parties
- Requiring specialties
- Awarding points
- Entering tasks

Setting up in-person meetings

When people will meet in person for a deposition, enter location details. You can enter locations manually but you save time and reduce errors if you select locations from your RB9 database. If you have a hybrid meeting with some attendees in the same location and others participating via Zoom you can include that dual information in the job.

Continued from Entering job locations.

1. Select location type

In a job's **Job Location** pane's **Location Type** drop-down select:

- **Manual**

  Default. To enter a location that is a one-off and does not need to be in your RB9 Location database.

- **Firm**

  To look up a firm's offices in your RB9 Firm database, or create a new firm location to use for this job. (See Adding firms to RB9.)

- **Location**

  To look up a location in your RB9 Location database, such as a hospital or doctor's office, or create a new location to use for this job. (See Adding locations to RB9.)

- **Resource**

  To look up a location in your RB9 Resource database, such as one of your conference rooms, or create a new resource to use for this job. (See Adding resources to RB9.)

  TIP: Don't double-book your conference rooms

  To avoid double-booking a room, in addition to selecting the room in Job Location, create a conference room task and assign the room to the task. See Scheduling conference rooms.

- **BU**

  To select one of your own office locations. Business Units are set in Business Units.

- **Same as Ordering Firm**

  To select the ordering firm's office as the location.

- **Virtual Meeting**

  If this is a Zoom-only meeting, this option hides the **Location for In-room Participants** pane. See Scheduling Zoom meetings.

NOTE: Jobs can include both in-person & virtual locations

If some participants will attend virtually, don't select Virtual Meeting in the **Location Type** dropdown. Use one of the other options, then add Zoom meeting details under **Location for Remote Participants.** See Scheduling Zoom meetings.

However only **Location for In-room Participants** information is displayed in **Job Location** columns in the results grid of Jobs (List View).

2. Enter/update location information

Depending on which **Location Type** was selected, you can enter or edit:

- #### Automatically update Job Location when linked location is changed even after the job date has passed

  RB9 does not automatically update a job location when you update the location in your RB9 database if the job has already occurred. For example, if a depo was taken at a law firm's office, and afterwards the firm moved. RB9 would not update the depo's location to the firm's new office address, unless you slide to Yes to keep the location updated in the job when it changes in your database.

- #### Location

  Enter location name in the field or look up location in **Lookup** pane. See Looking up locations. If this is an online meeting, enter the meeting's URL/web address.

  ##### TIP: Changing locations

  After selecting a location in an RB9 database, you can update your selection by clicking the **Location** field's ⋯ **>**

  - **Lookup Location:** To select a new location in the **Lookup** pane.
  - **View Location:** To see/update location information. See Adding locations to RB9.
  - **Remove Location:** To clear all location fields in the job.

  ##### NOTE: Automatic location warnings

  The uneditable **Warning** field appears in the **Job Location** pane when Firm, Location, or Resource is selected in the **Location** Type drop-down. If the selected location has a warning in its Entity listing, it will appear in red here.

- #### Address

  If location was selected from an RB9 database, this field is uneditable.

  Click **> Google Maps/MapQuest Maps/Bing Maps** to view job location on a map in a new window.

- **City**

  If location was selected from an RB database, this field is uneditable. If Location Type is Manual, default in this field is the designated BU's city. See Entering general job information.

- **State**

  If location was selected from an RB9 database, this field is uneditable. If Location Type is Manual, default in this field is the designated BU's state. See Entering general job information.

- **Zip**

  If location was selected from an RB9 database, this field is uneditable. If Location Type is Manual, enter zip code in this field and click . You do not need to enter the City or State. RB9 will automatically populate those fields correctly.

- **Phone**

  If location was selected from an RB9 database, this field is uneditable.

- **Directions**

  If the location was selected from an RB9 database, this field is uneditable.

- **Location Notes**

  Notes entered here are saved in the job, not the location.

3. ## Continue adding job information

   If this job is a hybrid with both Zoom and in-person locations, enter Zoom meeting information in the **Location for Remote Participants** section as well. See Scheduling Zoom meetings.

   You can enter other information you have for the job and upload files to the repository now or after saving the job.

   - For instructions for the next pane, see Entering additional job information.
   - To add files to the job's repository, see Uploading files to a repository.

4. ## Save job

   - In the New Job window click **Save.**
   - In the Edit Job window click **Save > Save & Close.**

Reference

- Business Units

Step-by-step instructions

- Entering job locations
- Scheduling jobs
- Searching jobs
- Adding firms to RB9
- Adding locations to RB9
- Adding resources to RB9
- Scheduling conference rooms
- Scheduling Zoom meetings
- Looking up locations
- Entering general job information
- Entering additional job information
- Uploading files to a repository

Scheduling Zoom meetings

If your job is going to be a virtual meeting via Zoom, you can schedule it in RB9. You can set up RB9 preferences so most of your Zoom information and preferences will automatically appear, and you won't have to enter it each time. You have to set up RB9 and Zoom to work together before you can use this feature. See Zoom preferences.

If you have a hybrid meeting with some attendees in the same location and others participating via Zoom you can include that dual information in the job.

IMPORTANT: If you schedule Zoom meetings via RB9, notification forms must include hybrid info

If you schedule Zoom meetings via RB9 your notification forms must include both physical location and Zoom meeting fields so Zoom meeting details are included in Job Confirmations/Cancellations and Assignment Notifications/Cancellations. See Updating forms for hybrid job locations.

Continued from Entering job locations.

1. Select Zoom

In a job's **Job Location** pane under **Location for Remote Participants** click the **URL** field's ⋙ **> Schedule Zoom Meeting.**

2. Enter/update Zoom information

1. In the **Schedule Zoom Meeting** panel, information from your Zoom preferences and the job will automatically appear. You can update any of this information:

   - ***Topic**

     Required
     Content comes from System Preferences and the job settings. Edit/enter text if desired.

   - ***Description**

     Required
     Content comes from System Preferences and the job settings. Edit/enter text if desired.

   - ***When**

     Required
     Date and time come from the job settings.

   - ***Duration**

     Required
     Hours and minutes come from the job's start and end times.

- ***Time Zone**

  Required

  Selected time zone comes from the job settings. See Entering general job information.

- **Video Host**

  If you want to start the meeting with the host's video on, slide to Yes. If you want to turn it on when you enter the meeting, Slide to No.

- **Video participant**

  If you want to start the meeting with all participant's video turned on, slide to Yes. If you want to let participants turn on video as they arrive, slide to No. Even if you select Yes, participants can turn their own video off and on during the meeting.

- **Allow participants to join anytime**

  If participants can join the meeting before the host arrives, slide to Yes. If you do not want meeting participants to join before the host arrives, slide to No. If you enabled the **Waiting Room,** this option will not work.

- **Mute participants upon entry**

  Slide to Yes if you want to have all participants muted when they join the meeting; you can unmute them later or allow them to unmute themselves. If participants do not have to be muted at first, slide to No.

- **Automatically record meeting (if selected option is unavailable, this option will be ignored)**

  Select where you want a recording of the meeting saved:

  - **None** – No recording, or to turn on recording manually.
  - **Cloud** – To save a recording in the Zoom account assigned to the meeting **(Schedule with Zoom Account** selected below).
  - **Local** – To save a recording to the computer used to host the meeting.

- **Waiting Room**

  If you want to admit participants individually to the meeting, slide to Yes. If you want to allow participants to enter the meeting as they arrive without gatekeeping, slide to No.

- ***Schedule with Zoom Account**

  Required

  If you have added other Zoom users to your Zoom account, this field will be blank. Click ▾ and select the RB9 user's email account that will be used for the Zoom meeting. If you are the only user in your Zoom account, your email will automatically appear in this field.

- **Host URL to**
  Select where the host's sign-in URL will appear:
  - **Resource Notification Notes** – If an assigned resource (someone other than you) will be hosting.
  - **Scheduling Notes** – If you or another RB9 user in your company will be hosting.
- **Join URL to**
  Select where the participants' sign-in URL will appear when Zoom meeting is scheduled:
  - **Confirmation Notes** – URL will appear in the **Confirmation Notes** field in the job's **Additional** pane.
  - **Job Location** – Meeting URL will appear in the **Job Location** pane's **URL** field.

2. Click **Save.** The Schedule Zoom Meeting panel closes. In the **Job Location** pane:
   - Meeting URL generated by Zoom appears in the **URL** field.
   - Meeting ID and passcode generated by Zoom appear in the **Notes** field, along with dialup numbers for the meeting.
3. If the meeting you are scheduling overlaps with another Zoom meeting scheduled with the same Zoom account, a popup will appear to notify you about the conflict and asking if you want to proceed. Click:
   - **Yes** – If you want to schedule this meeting, then resolve the time overlap.
   - **No** – If you want to change the Zoom account associated with this meeting **(*Schedule with Zoom Account)** or to reschedule this meeting.

3. Continue adding job information

If this job is a hybrid with both Zoom and in-person locations, enter location information in the **Location for In-room Participants** section as well. See Setting up in-person meetings.

You can enter other information you have for the job and upload files to the repository now or after saving the job.

- For instructions for the next pane, see Entering additional job information.
- To add files to the job's repository, see Uploading files to a repository.

4. **Save job**

- In the New Job window click **Save.**
- In the Edit Job window click **Save > Save & Close.**

NOTE: Zoom meetings display in results grids

Zoom-only meetings include the text "(Virtual Meeting)" in the **Job Location** column in the results grids of Jobs (List View) and Send Job Confirmations/Cancellations when the **Location Type** in the job is Virtual Meeting and the job's **Location for Remote Participant**s displays a meeting URL.

For hybrid meetings, only **Location for In-room Participants** information is displayed in **Job Location** columns in the results grid of Jobs (List View).

TIP: Send clients meeting URL & passcode automatically

Set up your Job Confirmation form template(s) to include the Confirmation Notes and Directions data fields. That way, the meeting URL and passcode will be included on Job Confirmations for Zoom meetings.(See Editing form Data Fields options.)

NOTE: Changing job times affects Zoom meeting times

If you change the start or end time of a job that includes a Zoom meeting, the corresponding Zoom meeting time will be automatically updated to the new job time.

NOTE: Zoom meetings cancel when job is canceled or rescheduled

If you cancel a job in RB9 and it includes a Zoom meeting, RB9 will alert you so you can have it automatically cancel the job for you. See Canceling jobs.

If you reschedule a job and it includes a Zoom meeting you scheduled using RB9, RB9 will automatically adjust the time for you. See Rescheduling jobs.

Reference

- Zoom preferences
- Form Templates

Step-by-step instructions

- Entering job locations
- Scheduling jobs
- Updating forms for hybrid job locations
- Entering general job information
- Setting up in-person meetings
- Entering additional job information
- Uploading files to a repository
- Sending job confirmations or cancellations
- Editing form Data Fields options
- Canceling jobs
- Rescheduling jobs

Scheduling conference rooms

If you want to schedule conference rooms for jobs so you can avoid double-booking rooms, follow this procedure:

1. **Set up room as a resource**

   Enter your conference rooms in RB9's Resources database, not the Locations database. See Adding resources to RB9.

2. **Select room as job location**

   1. When entering a job, in the New Job/Edit Job window's **Job Location** pane, select Resource in **Location Type.** See Entering job locations.
   2. In the **Lookup Resource** panel, search for and select the conference room. See Looking for resources.
   3. Click **Save.**

3. **Assign room as a resource**

   1. In the View Job window, click **Edit.**
   2. Click **Edit Job > Tasks** or scroll down to the **Tasks** pane.
   3. Click in the **Tasks** pane.
   4. In the **New Task** panel, select your conference room type in ***Task** *(required).* Task types are set in Lists > Jobs.
   5. Click next to the **Resource** field.
   6. In the **Assign Resource** panel, click the **Resource Type** and select Conference Room as the type. Resource types are set in Lists > Resources.
   7. Click **Save.**
   8. Click .
   9. In the results grid, click the room's **> Assign.** Then click **Save.**
   10. Click **No** in the popup. RB9 creates the task and removes the room from your available resources for the time period scheduled. This way, you cannot double-book a room and you can see the schedule for your conference rooms in Resource Availability (see Managing resource availability).

Reference

- Resources
- Jobs lists
- Resources lists

Step-by-step instructions

- Adding resources to RB9
- Entering job locations
- Scheduling jobs
- Looking for resources
- Managing resource availability

Entering additional job information

Update defaults and enter additional job information in the New Job/Edit Job window.

1. Access a job

1. If not already in a New Job/Edit Job window, find the job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)** and open the job. See Searching jobs.
2. In the View Job window, click **Edit.**

2. Enter/update information

In a New Job/Edit Job window, scroll or jump to the **Additional** pane, and enter or update text or make selections:

- **Notation**

  (24-character limit) Special notations, such as "V" (for video), "RT" (for realtime), "1 of 2," or "Daily," that appear in the job listings grid so you don't have to open jobs to see this information.

- **Rescheduled From**

  Edit Job window only

  Uneditable field show job number of original job that was rescheduled. To view the original job's details, click .

- **Linked Job**

  Edit Job window only

  Job number of job this job is linked to. To view the linked job's details, click . To unlink the job, delete its number. To link to a different, existing job, enter the new job's number. Ony one job can be linked to another job.

- **Sales Rep**

  The account executive or sales representative for the job. Sales representatives are set up in Resources.

- **How Referred**

  The way the contact found your business. Options are set up in Lists > Jobs.

- **Scheduling Notes**

  Unlimited character count. Remarks for internal use only. Text entered here does not

appear on any outgoing communications. It will appear on Job Printouts if Show Scheduling Notes is set to Yes.

To customize the appearance of the notes, see Customizing notes & remarks. Text customizations will appear in job printouts. To include boilerplate text set up using Notes Templates, see Adding boilerplate text to remarks & notes.

- **Confirmation Notes**

  Unlimited character count. Remarks for the client. Text entered here appears on:

  - Confirmation email in the Remarks section. See Sending job confirmations or cancellations.
  - Assignment Notification worksheets sent to resources if this optional field is added to the worksheets in Form Templates.
  - Job Printouts if Show Confirmation Notes is set to Yes.

  To customize the appearance of the remarks, see Customizing notes & remarks. Text customizations will appear in printed forms and emails. To include boilerplate text set up using Notes Templates, see Adding boilerplate text to remarks & notes.

- **Resource Notification Notes**

  Unlimited character count. Any instructions or remarks for the assigned resource(s) to know about the job. Text entered here appears on:

  - Assignment Notification form in the Resource Notification Notes data field. See Sending individual assignment notifications and Sending batch assignment notifications/cancellations.
  - Job Printouts if Show Resource Notification Notes is set to Yes.

  To customize the appearance of the notes, see Customizing notes & remarks. Text customizations will appear in Assignment Notifications sent to resources. To include boilerplate text set up using Notes Templates, see Adding boilerplate text to remarks & notes.

- **Production/Billing Notes**

  Unlimited character count. Text entered here appears:

  - At the top of the job's detail screen in Turn In.
  - On Production Sheets.
  - On Assignment Notification worksheets sent to resources if this optional field is added to the worksheets in Form Templates.

  To customize the appearance of the notes, see Customizing notes & remarks. Text customizations will appear in data fields, printed forms and emails. To include boilerplate text set up using Notes Templates, see Adding boilerplate text to remarks & notes.

3. **Save job**

   In the New Job window, click **Save** or **Save > Save & Close** in the Edit Job window.

NEXT: Enter parties or specialties

Once you have set a job with its required information, you can enter other information you have for the job in any order. If you have not already entered parties, see Adding parties. If the job requires any specific expertise, see Requiring specialties.

Reference

- Linked Jobs
- Sales Rep
- Resources
- Jobs lists
- Notes Templates
- Form Templates
- Job Printout
- Production Sheets
- Turn In
- Parties
- Specialties

Step-by-step instructions

- Scheduling jobs
- Searching jobs
- Creating linked jobs
- Sending job confirmations or cancellations
- Sending individual assignment notifications
- Sending batch assignment notifications/cancellations
- Entering job locations
- Entering general job information
- Customizing notes & remarks
- Adding boilerplate text to remarks & notes
- Adding parties
- Updating parties
- Requiring specialties
- Awarding points
- Entering tasks
- Uploading repository files
- Entering notes
- Changing case or job status
- Rescheduling jobs
- Viewing job calendars

Confirming single jobs

When setting a job, get confirmation from the client that this is what they want. You can send a confirmation notice for a job as soon as you create it. You can also use the shortcut from the main grid to send a confirmation for a specific job. Then track their response.

Continued from Scheduling jobs.

1. Send confirmation notice

1. After saving a new job, click **More > Send Job Confirmation** in the job's Edit Job window. (See Scheduling jobs.) OR search for the job in Jobs (List View) and click its **> Send Job Confirmation.**
2. To finalize and send the email, see Emailing & texting from RB9.
3. RB9 sends the email, makes an entry in the job's Notes Log and Status History Log, and makes an entry in the Email Log *(RB9 Standard only)*.

2. Follow up with client

1. When the client confirms the job, update the job's status in its Edit Job window by clicking **Status** field's ▽ **> Change Status.**
2. In the **Change Status** panel, select Confirmed in ***Status to be** (*required),* then click **Save.** For more information, see Confirming jobs.

NOTE: Confirm linked job at same time

If there is a job linked to this job, a popup appears asking if you want to open the linked job. In most cases, a linked job is a video job for the depo being confirmed, so in those cases, click **Yes.** Then in the linked job's View Job window, click **Edit** and continue from Step 2 above.

NOTE: Send multiple confirmations at once

Instead of sending confirmations one at a time, you can send batch confirmation (or cancellation) emails from RB9. See Sending job confirmations or cancellations.

NOTE: Viewing status history

In an Edit Case/Edit Job 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.

TIP: Send job confirmations from search results

Use a shortcut to send a job confirmation from the Jobs (List View) main screen: With the job you want to send the confirmation for visible in the results pane of the main screen,

click its **> Send Job Confirmation.** The Edit Job window for the selected job appears with the **Options** panel already open. Follow from step 2 above to send the confirmation email.

Reference

- Jobs
- Jobs (List View)
- Email preferences
- Notes Log
- Email Log

Step-by-step instructions

- Scheduling jobs
- Emailing & texting from RB9
- Confirming jobs
- Sending job confirmations or cancellations

Canceling jobs

To maintain a paper trail, jobs in RB9 cannot be deleted. They can only be canceled or rescheduled. When canceling a job, all associated tasks are canceled too. If the job was scheduled as a Zoom meeting, the Zoom meeting will be canceled too. You can alert clients and resources to the cancellation immediately from within the job or later.

1. Find job to cancel

1. **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)**
2. In Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View), find and select the job you want to cancel. See Searching jobs.
3. In the View Job window, click **Edit.**

2. Change status to canceled

1. In the Edit Job window, click **Status** field's ▽ > **Change Status to Cancelled.**
2. In the **Change Status** panel, click **Save.** Then click **Yes** in the Change Status popup to cancel the job.

3. Send confirmation/notification

1. A popup appears asking if you want to send a Job Cancellation notice. To send your client confirmation, click **Yes** in the popup. Then finalize and send the email. See Emailing & texting from RB9.
2. RB9 sends the email, changes **Status** to Cancelled, makes an entry in the job's Notes Log and Status History Log, and makes an entry in the Email Log *(RB9 Standard only)*.
3. If resources were assigned to the job and their email addresses are on file, a popup appears asking if you want to send Assignment Cancellation notices.
   - Click **Yes** to send a notice immediately. Then select notification options and send notices. See Notifying resources individually.
   - If you prefer to send notifications in batches instead of individually, click **No** and see Sending batch assignment notifications/cancellations.

TIP: Resend job cancellation notices from within the job

If you need to resend a Job Cancellation notice to a client, you could go to Send Job Confirmations/Cancellations to resend the notice. Or you can click **More > Send Job**

Cancellation in the Edit Job window, then follow the above instructions for "Send confirmation/notification."

NOTE: Cancel linked job at same time

If there is a job linked to this job, a popup appears asking if you want to open the linked job. In most cases, a linked job is a video job for the depo being cancelled, so in those cases, click **Yes.** Then in the linked job's View Job window, click **Edit** and continue from Step 2 above.

Reference

- Jobs
- Email preferences
- Notes Log
- Email Log
- Send Job Confirmations/Cancellations

Step-by-step instructions

- Searching jobs
- Rescheduling jobs
- Emailing & texting from RB9
- Notifying resources individually
- Sending batch assignment notifications/cancellations

Rescheduling jobs

To maintain a paper trail, jobs in RB9 cannot be deleted. They can only be canceled or rescheduled.

1. Find job to be rescheduled

1. **Calendar > Jobs (List View)** (See Searching jobs.)
2. In the results pane, click the hyperlinked job you want to reschedule. You can reschedule any job, except canceled jobs.
3. In the View Job window, click **Edit.**

2. Reschedule job

1. In the View Job window of a job you want to reschedule, click **Edit.**
2. In the Edit Job window, click **More > Reschedule Job.**
3. In the **Reschedule Job** panel, enter a new ***Job Date,** ***Start Time** and ***End Time** times *(all required),* and the name of the contact who rescheduled the job in **Remarks.**
4. Click **OK.** RB9 automatically:
   - Changes the job status of the original job to Cancelled.
   - Creates a new job by replicating the canceled job.
   - Opens the new job's Edit Job window to the **Parties** pane.
   - Records the event in the **Status History Log** of both jobs.

NOTE: Zoom info stays the same for rescheduled jobs

If the rescheduled job includes a Zoom meeting you set up in RB9, the Zoom meeting date and time are automatically updated, so you do not have to send clients a new Zoom meeting ID and passcode. See Scheduling Zoom meetings.

3. Send confirmation/notifications

1. A popup appears asking if you want to send a Job Cancellation notice. To send your client confirmation, click **Yes** in the popup. Then finalize and send the email. See Emailing & texting from RB9.
2. RB9 sends the email, changes **Status** to Cancelled, and makes an entry in the job's Notes Log and Status History Log.

3. If resources were assigned to the job and their email addresses are on file, a popup appears asking if you want to send Assignment Cancellation notices.

   - Click **Yes** to send a notice immediately. Then select notification options and send notices. See Notifying resources individually.
   - If you prefer to send notifications in batches instead of individually, see Sending batch assignment notifications/cancellations.

   If you send an Assignment Cancellation notice, RB9 makes an entry in the job's Notes Log.

4. **Update any information**

   If any job information changed in addition to the date, edit that information before sending job confirmations. See Scheduling jobs.

5. **Send confirmation**

   In the Edit Job window of the new job, click **More > Send Job Confirmation** to send a confirmation of the new job to the client. See Confirming single jobs.

6. **Save job**

   In the Edit Job window of the new job, click **Save & Close.**

TIP: Can't reschedule a canceled job? Copy it instead

If you want to use information from a canceled job for a new job, click **More > Copy Job** in the canceled job's Edit Job window. All job information will copy to a new job except the job date.

NOTE: Viewing Status History

In an Edit Case/Edit Job window, ▽ **> 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

- Jobs
- Email preferences

Step-by-step instructions

- Canceling jobs
- Searching in RB9
- Scheduling jobs
- Scheduling Zoom meetings
- Confirming single jobs
- Sending job confirmations or cancellations

Creating jobs in bulk

If you have a series of regularly scheduled jobs for a single client or case, save time by scheduling the jobs in advance with **Set Multiple Job Dates.** Select every day or specific days of the week within a time frame, and RB9 automatically sets up the jobs.

1. Start new job

- **In a case,** click **More > Create Jobs** in the Edit Case window.
- **From scratch,** in **Calendar > Jobs (List View)** or **Jobs (Monthly View**) or **Jobs (Weekly View),** click **New.** Then click **Set Multiple Job Dates** in the New Job window.

2. Enter job dates

1. The **Set Job Dates** panel opens automatically. In the **Type** drop-down choose:
   - ### Scheduler

     Default wizard adds dates within a range automatically.

     1. **Occurs:** Select Daily to create jobs for every day including Saturday and Sunday. Select Weekly to select the days of the week.
     2. **Weekdays:** Default is Yes Monday through Friday, and No for weekends. Click any of the sliders to change which days of the week are selected.
     3. **Duration:** Enter the ***Start Date** and ***End Date***(required).***
   - ### Fixed Dates

     Add dates one at a time.

     1. In the **Job Date** pane, enter a date in the field or select a date in the Date Navigator.
     2. Click **Add New Date** and select another date.
     3. Repeat until you have entered all the dates.
2. Click **Save.** The specified parameters appear in the **Job Date** field.

TIP: Multiple appearances for the same job on a single day?

If there are more than one witness appearing on the same day for the same job, use **Fixed Dates** to quickly set up the multiple appearances for the same day. If the appearances are for different times on the same day, enter the first appearance's

times in **Start Time/End Time.** Then edit the times of the other scheduled appearance(s) to their correct times.

3. ## Enter required information

   Finish adding required information. You can change this information for individual jobs in this series after you save them.

   - ***Ordering Firm**

     Required. See Looking up firms.

     Ordering Firm Warning and **Ordering Firm Calendar Notes** come from the ordering firm's entry in Firms.

   - ***Ordering Contact**

     Required. From default drop-down of contacts, or click + **> New Contact** to add a new contact to the ordering firm (see Adding contacts to RB9).

     Ordering Contact Warning and **Ordering Contact Calendar Notes** come from the ordering contact's entry in Contacts.

   - ***Start Time/*End Time**

     Required. Select times in popup lists.

   - ***Business Unit**

     Required. Change the default if needed. BUs are set up in Business Units.

4. ## Enter duplicate information

   If you have job information that will be the same for all of these jobs, such as job location, enter the details before saving the job. You can also upload files to the repository that should be shared among the jobs.

   See Entering general job information, Entering job locations, Entering additional job information, and Uploading files to a repository.

5. ## Save the jobs

   1. Click **Save.** Identical jobs are created for the specified dates, jobs are assigned numbers, and the Edit Job window closes.

   2. To:

      - **Update/enter more job details,** search for the jobs and enter the information in individual jobs. See Searching jobs, Parties, Specialties, Award Points, Tasks, and Notes Log.

      - **Send a job confirmation,** see Sending job confirmations or cancellations.

NEXT: Confirm job with client

Verify that you have entered your client's request correctly into RB9 by sending them a job confirmation email. You can send job confirmations as you schedule jobs or send a day's worth at once (see Sending job confirmations or cancellations).

Reference

- Jobs
- Date Navigator
- Firms
- Contacts
- Business Units
- Repository
- Parties
- Specialties
- Award Points
- Tasks
- Notes Log

Step-by-step instructions

- Scheduling jobs from scratch
- Looking up firms
- Adding contacts to RB9
- Entering general job information
- Entering job locations
- Entering additional job information
- Uploading files to a repository
- Searching jobs
- Adding parties
- Requiring specialties
- Awarding job points
- Entering tasks
- Making entries in notes logs
- Sending job confirmations or cancellations

Sending job confirmations or cancellations

Save time when emailing confirmation or cancellation notices for jobs by sending them in batches.

1. Select jobs

1. **Calendar > Send Job Confirmations/Cancellations**
2. **Date** defaults to today. Click in the **Search By** pane to see all new jobs you scheduled today, or use the **Search By** filters to restrict the results before clicking :

   - ### Confirmation Type

     Default is Confirmation.

     To send cancellation notices, select Cancellation in the drop-down.

   - ### Date Type

     Select a date category in the drop-down:

     - **Job Date –** To see jobs scheduled for a specific date/range.
     - **Scheduled Date** – Default. To see jobs entered into the calendar on a specific date/in a date range.

   - ### Date From/Date To

     Defaults to a range from today to blank. Click in these fields to enter a different date range (see Date Navigator).

     #### TIP: For specific date, not date range, leave one field blank

     Instead of entering the same date twice when you want to search for information about a single day, enter the date in only one field and empty the other field. When you search, RB9 will use the same date for both fields.

   - ### Job No.

     Restrict the search to a single job by entering its job number.

   - ### Job Type

     Categories of jobs requested by clients. Default is ALL. Click to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

   - ### Business Units

     Profit centers or parts of your business you track separately. Default is ALL. Click

to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. Prepare results

In the results pane, check the box(es) of the job(s) you wish to send confirmations/cancellations for. Note:

- If you want to review a job, click its hyperlinked number in the **Job No.** column.
- If a result does not have a checkbox, the job's ordering contact is missing an email address in their profile. Click the hyperlinked job number to edit the job's **Ordering Client** pane to add their email address to their profile. See Adding contacts to RB9.

3. Send email

1. Click **Send Email.**
2. To finalize and send the email(s), see Emailing & texting from RB9.
3. RB9 sends the email(s), makes an entry recording the email in the Notes Log of the job(s), and makes an entry in the Email Log *(RB9 Standard only)*. See Making entries in notes logs

TIP: Include iCalendar file with job confirmation emails

You can automatically include iCalendar files with confirmation emails by choosing that option in System Preferences > Job Confirmation. See Customizing communications.

NOTE: Sending confirmations/cancellations from a job

You can also send notices to clients from within a single job. See Confirming single jobs and Canceling jobs.

TIP: Send job confirmations from search results

Use a shortcut to send a job confirmation from the Jobs (List View) main screen: With the job you want to send the confirmation for visible in the results pane of the main screen, click its **> Send Job Confirmation.** The Edit Job window for the selected job appears with the **Options** panel already open. Follow from step 2 above to send the confirmation email.

NEXT: Receiving client confirmations

After sending out job confirmations, follow up with clients and record their responses. See Confirming jobs.

Reference

- Date Navigator
- Lookup panel
- Jobs lists

- Business Units
- Email preferences
- Job Confirmation preferences
- Job Cancellation preferences
- Email Log

Step-by-step instructions

- Scheduling jobs
- Emailing & texting from RB9
- Searching in RB9
- Adding contacts to RB9
- Customizing communications
- Confirming single jobs
- Canceling jobs
- Confirming jobs

Confirming jobs

After sending out job confirmation notices, either singly or in batches, follow up with clients and record their responses in RB9.

1. View tomorrow's jobs

1. **Calendar > Send Job Confirmations/Cancellations**
2. To see all new jobs scheduled for tomorrow, use the **Search By** filters:
   - **Confirmation Type**

     Leave as the default: Confirmation.
   - **Date Type**

     Scheduled Date is the default. Select Job Date in the drop-down.
   - **Date From/Date To**

     Works with **Date Type.** Default for both is tomorrow's date. If desired, change it in the Date Navigator. Limited to a 30-day search range.
   - **Job No.**

     Leave blank.
   - **Job Type**

     Categories of jobs requested by clients. Leave as default: ALL.
   - **Business Units**

     Your company's profit centers. Leave as default: ALL
3. Click . RB9 lists all jobs scheduled for tomorrow in the results pane.

2. Confirm jobs

1. For each job with a **Status** of New, click its hyperlinked **Job No.**
   1. If the client has not contacted you, click **View Job > Ordering Client.**
   2. Click **Scheduled By's** and use the contact information in the **General** pane of the **View Contact** panel to confirm the job with the client.
2. If the client reschedules the job, see Rescheduling jobs. Otherwise, to record the client's response, click **Edit** in the View Job window.

3. In the Edit Job window, update the job's status by clicking **Status** field's ▽ **> Change Status.**

4. In the **Change Status** panel's ***Status to be** *(required):*

   - **If the client confirms the job:** Select Confirmed. Then enter the name of the person who confirmed the job in **Remarks.**
   - **If the client isn't available but will call back to confirm:** Select Will Call Back. Enter any comments in **Remarks.**
   - **If the client cancels the job:** Select Cancel. Then enter the name of the person who canceled the job in **Remarks.** See Canceling jobs.

5. Click **Save.** RB9 updates **Status** in the Edit Job window.

TIP: Double-check that tomorrow's jobs are confirmed

Review the Status column in Send Job Confirmations/Cancellations at the end of the day for any jobs still waiting for a call-back or not confirmed. Click the Status column header to sort jobs by their job status.

NEXT: Assign resources

If you do not pre-assign resources, use Quick Assignments to assign resources to tomorrow's tasks. See Quick Assignments *(RB9 Standard only)*.

Reference

- Jobs
- Date Navigator
- Quick Assignments

Step-by-step instructions

- Entering dates
- Searching in RB9
- Adding contacts to RB9
- Confirming single jobs
- Canceling jobs

Tasks

In RB9, when you schedule a job, you include any **services requested** — reporting, interpreting, video, conference room, etc. — as tasks in the job, not as separate jobs.

TIP: Set up tasks to match your company's services

Define tasks for your business in Lists > Jobs. You can also designate one of your task types as the default task that appears in new jobs. See Customizing lists.

TIP: Which of 2 views to use

You have two options for monitoring tasks, so which one should you use?

Tasks (List View) shows the most information about tasks in the results, you can customize how the results are displayed, and it has more search criteria than Monthly View plus shortcuts to creating new tasks and setting/clearing task acknowledgements. List View will also display jobs that do not have tasks yet (such as Request New jobs from RB Connect).

Tasks (Monthly View) is similar to Jobs (Monthly View) and displays jobs by job number in a calendar page format so you can see your work schedule at a glance. If your browser window isn't large enough to display the whole month, the calendar will scroll so the current week is visible as the default view. Monthly View only displays jobs that have tasks. Rolling over a job number pops up basic information about the task, job, and case.

In both views, clicking a displayed item opens the job detail screen with the View Task panel already open so you can see complete task details and edit if needed. Depending on how you prefer to view information and what you want to do with it, you can choose the view that best fits your needs.

Reference

- Task
- Jobs
- Jobs lists
- Tasks (List View)
- Tasks (Monthly View)

Step-by-step instructions

- Entering tasks
- Monitoring task assignments
- Customizing lists
- Scheduling jobs from online requests

Viewing monthly task calendars

Use Monthly View to see tasks in a month-by-month calendar with popup summaries of the tasks. A bar at the bottom of each day's box lists the total tasks/unassigned tasks for the day. Listings are color coded based on their job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.) Tasks that have been canceled after they were assigned to a resource are further differentiated by a strikethrough line through the task listing.

1. Monthly View defaults to all tasks for the current month. Today's date has a gray background to highlight it. If your screen is smaller than the calendar view, it will automatically be scrolled down to show today's date. Use search criteria to restrict the view/find tasks. See Searching task assignments.

2. Roll over a task listing to pop up additional information including job time, task time (if different from job time), and task status.

3. Click on the task listing to open the View Task panel in the job detail window (see Updating tasks).

4. To view more information in Monthly View:

   - Click on the bar at the bottom of a day's box to pop up a window listing all of the day's tasks in a List View format. Like List View, the popup window dynamically sizes itself to the underlying window, and is maximized in size so you can see more with less scrolling. To close the popup click the x in the top right of the window.

   - Page back and forth through months by clicking ◂ or ▸ at the top of the calendar.

   - Jump to a particular month by clicking the month name and selecting a new month in the Date Navigator.

   - Return to the current month by clicking **Today.**

   - If the whole monthly calendar is not visible, use the scroll bars to view hidden sections. Or click **Today** to automatically scroll the current calendar page to today's date. The top navigation bar stays visible when scrolling a calendar page vertically so you can easily see the month and year and navigate to other calendar pages.

NOTE: Monthly View customization

You can customize what identifying information appears in the task descriptions, and set a maximum number of tasks to display per day in System Preferences > Calendar > Tasks (Monthly View).

TIP: Find a task by date

Use Monthly View to get an immediate handle on how many tasks are scheduled for any date and how many are still unassigned.

Reference

- Job Status Color preferences
- Tasks (List View)
- Date Navigator
- Tasks (Monthly View) preferences

Step-by-step instructions

- Searching task assignments
- Updating tasks

Entering tasks

All jobs include a default task, which is set in Lists > Jobs. You can change the task in a job if the job does not require the default task, but all jobs must have at least one task included. A job can have an unlimited number of tasks and tasks tied to a job can have different start and end times from the job. You can enter tasks in a job when scheduling it or at any time later.

Continued from Scheduling jobs.

1. Access job

1. To start adding tasks to a job either:
   - Create a new job. Enter required information, and click **Save.**
   - Search for a job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)/Tasks (List View).**

   See Scheduling jobs, Searching jobs, or Searching task assignments.
2. Depending on how you selected the job:
   - In a newly saved job, scroll or jump to **Tasks** pane and click .
   - In **Jobs (List View),** click **> Edit** next to the **Job No.** in the results grid. Then scroll or jump to the **Tasks** pane and click .
   - In a Jobs results grid/calendar page, click the hyperlinked **Job No.** Then click **Edit** in the View Job window. In the Edit Job window scroll or jump to **Tasks** pane and click .
   - In **Tasks (List View),** click the job's **> New.**

2. Enter task

1. In the **New Task** panel, enter text or make selections:
   - ***Task**

     Required. List of task types. Check the box(es) of task type(s) involved in the job. Task types, including the default, are defined in Lists > Jobs.
   - ***Order Date**

     Required. Default is job date.

- **Due Date**

  Deadline for the task(s). Leave blank and RB9 will calculate due date(s) using the default deadlines set in the ordering firm's **Task Due Days** pane, or if the firm has no preferences set, from the assigned BU's **Task Due Days** pane. (See Entering default task deadlines.)

- **Use different task time from job time**

  If you have a job with tasks that will start at different times than the job slide to Yes.

- ***Start Time/*End Time**

  *Required when **Use different task time from job time** is set to Yes.* Default is job time. Enter different start and end times for the task as needed. RB9 automatically logs when a task's Start Time or End Time changes to the job's Notes Log.

  IMPORTANT: Update forms & other correspondence with task times

  If you use the task start/end times, include that information in form templates and emails that you send to resources such as assignment notifications and cancellations so they have accurate information. See Updating forms for separate task times.

  NOTE: Task times take precedence over job times in some functions

  If a task has different start/end times than its related job, those task times are used instead of the job times:

  - In Tasks (Monthly View): Task start time is displayed if Start Time is selected as **Line Data in Monthly View** in Tasks (Monthly View) preferences.
  - When determining which resources are available to be assigned to the task. See Assigning and pre-assigning resources.
  - In iCalendar files that can add the task to calendar applications. See Customizing communications.
  - In some functions in RB Connect and RB Connect Mobile on the Resource side.

  NOTE: Change task times manually if job times change

  If an assigned task has different start/end times from the job and the job time changes the system will display an alert to manually change the task time when you save the job time change. See Entering general job information.

- **Resource**

  Click to assign a resource. Each task can have only one resource. If you are entering multiple tasks at once, selecting a resource here will assign them to all

the tasks. You can add or change the resource later. See Assigning resources to tasks.

- **Resource Warning**

  If the assigned resource has a warning in their entry in RB9 it appears in this uneditable field. See Entering general resource information.

- **Notes**

  Unlimited character count. Any notes about the task. Text entered here appears on the Assignment Notification form in the optional Tasks Notes data field. See Sending individual assignment notifications and Sending batch assignment notifications/cancellations. To customize the appearance of the notes, see Customizing notes & remarks.

3. Save task

1. In the **New Task** panel, click **Save.** The panel closes, and the new or updated task appears in the **Tasks** pane of the Edit Job window.
2. If you assigned a resource, RB9 prompts you to send an assignment notification to the resource (if you have the resource's email address on file). See Sending individual assignment notifications. Or if you prefer to send all of a day's assignments at once, click **No** in the prompt and use Send Assignment Notifications/Cancellations.
3. To add files to the task's repository or update the task, click the task hyperlink in the **Tasks** pane and see Updating tasks.
4. Save the job by clicking **Save > Save & Edit** or **Save > Save & Close** in the Edit Job window.

NEXT: Assigning resources or confirming jobs

If you pre-assign resources, you can assign them to tasks as you create the task or after you have saved the task. See Assigning resources. You can also assign all of a day's resources quickly using Quick Assignments *(RB9 Standard only).* If you prefer to wait until you have confirmed a job before assigning resources, see Confirming jobs.

NOTE: Review upcoming tasks

To be sure you do not overlook tasks and to catch errors, use Tasks (List View) or Tasks (Monthly View) to search for all jobs for tomorrow, next week, or that meet other criteria. Review the results and update or add tasks to the jobs as needed.

Reference

- Task definition
- Tasks
- Jobs lists

- Notes Log
- Tasks (Monthly View) preferences
- New Job preferences
- Date Navigator
- Send Assignment Notifications/Cancellations
- Quick Assignments
- Tasks (List View)
- Tasks (Monthly View)
- RB Connect
- RB Connect Mobile

Step-by-step instructions

- Monitoring & managing task assignments
- Scheduling jobs
- Searching jobs
- Searching task assignments
- Updating tasks
- Entering default task deadlines
- Updating forms for separate task times
- Customizing communications
- Assigning and pre-assigning resources
- Entering general job information
- Assigning resources to tasks
- Entering general resource information
- Customizing notes & remarks
- Notifying resources
- Sending individual assignment notifications
- Sending batch assignment notifications/cancellations
- Confirming jobs

Searching task assignments

Find tasks (and their associated jobs) to monitor and update. From the Tasks (List View) results grid, you can also quickly add tasks to existing jobs, record resource acknowledgements of assignments, and clear resource acknowledgements.

1. **Calendar > Tasks (List View)/Tasks (Monthly View)**
2. Depending on the function used:
   - Monthly View automatically displays the current month with the background of today's day highlighted in gray. See Viewing monthly task calendars.
   - If in List View click in the **Search By** pane to find tasks for all jobs scheduled for tomorrow.
3. In either version, use the **Search By** filters to restrict the results:
   - **Date Type**

     Job Date – Default. Date job was scheduled to occur.
     Order Date – Job date or the date a write-up was ordered for a previously billed non-transcribed job.

   - **Date From/Date To**

     List View only
     Default is tomorrow. Change date range, if desired (see Date Navigator).

   - **Task**

     Parts of jobs requiring separate resources. Default is ALL. Click to restrict search to specific tasks (see Lookup panel). Task options are set in Lists > Jobs.

   - **Task Status**

     Stage the task is in, e.g., Proofing or Complete. Default is ALL. Click to restrict the results (see Lookup panel). Task status options are set in Lists > Jobs.

   - **Resource**

     Leave blank unless you want to monitor tasks for a particular resource. To see tasks for a single resource, see Looking up resources.

   - **Priority Level**

     Order of preference or availability. Priority levels, including the default, are defined in Lists > Resources.

   - **Resource Type**

     Profession(s) and/or other type of resource(s). Resource types, including the default, are defined in Lists > Resources.

- **Job No.**

  List View only

  Single job number

- **Job Status**

  Stage the job is in, e.g., New or Cancelled. Default is ALL. Click to restrict the results (see Lookup panel). Job status options are set in Lists > Jobs.

- **Job Type**

  Categories of jobs requested by clients. Default is ALL. Click to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

- **Case**

  Leave blank unless you want to monitor tasks for a particular case. To select a case, see Looking up cases.

- **Show Cancelled Tasks**

  Yes – Default. All tasks that fit the rest of the search criteria.

  No – Reduced results returned, only active tasks.

- **Show Not-Assigned Tasks Only**

  Yes – Reduced results returned, only tasks that were not assigned to a resource yet.

  No – Default. All tasks that fit the rest of the search criteria.

4. Click . RB9 displays all of the tasks that meet the specified search condition(s) color coded by the related job's job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.) To:

   - **Add tasks:** Click **> New** next to the desired job number and enter a new task. See Entering tasks starting with step 2.
   - **View tasks:** Click **> View** next to the desired task or click the hyperlinked task name to view the task in the **View Task** panel in its job. See Monitoring & managing task assignments.
   - **Edit tasks:** Click **> Edit** next to the desired task to go directly to the task's **Edit Task** panel in its job. See Updating tasks.

     You can also click the hyperlinked task name, then click **Edit** in the View Job window to edit the task.

- **Record resource acknowledgements:** Click **> Set Acknowledged Date** next to the job number of the task a resource has acknowledged. In the popup that appears, click **Yes.** The current date and time will be automatically entered in the **Acknowledged Date** column.
- **Remove resource acknowledgements:** Click **> Clear Acknowledged Date** next to the job number of the task with a date and time in the **Acknowledged Date** column. In the popup that appears, click **Yes.** The date and time will be deleted from the **Acknowledged Date** column.
- **Manage tasks:** See Monitoring & managing task assignments.

TIP: Set up the results grid to work for you

The Tasks (List View) 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

- Task
- Tasks (List View)
- Tasks (Monthly View)
- Date Navigator
- Lookup panel
- Jobs lists
- Resources lists
- Business Units
- Job Status Color preferences

Step-by-step instructions

- Searching in RB9
- Viewing monthly task calendars
- Looking up resources
- Looking up cases
- Updating tasks
- Entering tasks
- Monitoring & managing task assignments
- Customizing grids

Monitoring & managing task assignments

To be sure that no part of a job that requires a separate resource has been overlooked, not assigned, or not acknowledged, use the Tasks functions to search for jobs, then review the jobs that RB9 found met your search criteria for any errors or omissions. You can update jobs here to add tasks, assign resources, send notifications and record acknowledgements. You can also delete or cancel tasks, and begin turning in the related job.

Continued from Searching task assignments.

1. In:
   - **Task (List View):** Check the list for any incorrect or missing tasks, unassigned tasks, and blank notification or acknowledged dates.
   - **Task (Monthly View):** Roll over a job number to view basic task, job, and case information.
2. To add tasks, see Entering tasks.
3. To manage an existing task, click:
   - **> Edit** next to the task in List View to go to the task's **Edit Task** panel in its job.
   - The task's hyperlink in List View or the job number on the calendar page in Monthly View. The View Job window opens with the **View Task** panel open automatically. Click **Edit**.
4. To:
   - **Update tasks:** To upload files or enter resource acknowledgements, page estimates, etc., see Updating tasks.
   - **Remove a task:** If there is no assigned resource or the resource assigned to the task hasn't been notified yet, you can delete it. Click **More > Delete Task** in the **Edit Task** panel. Then click **Yes** in the popup.
   - **Cancel a task:** If the resource assigned to the task has been notified, you cannot delete the task. Instead, cancel it. Click **More > Cancel Task** in the **Edit Task** panel. Then click **Yes** in the popup to notify the resource. See Notifying resources individually.
   - **Reactivate a task:** If a task has been canceled, it can be reactivated and a new resource assigned to it. Click **More > Reactivate Task** in the **Edit Task** panel. Then click **Yes** in the popup. You can then assign a resource to the task. See Assigning resources to tasks.

- **Cancel and reactivate a task at the same time:** To cancel an assigned task and reactivitate it at the same time, click **More > Cancel and Reactivate Task** in the **Edit Task** panel. Click **Yes** in the alert popup, then click **Yes** in the next popup if you want to send the canceled resource an Assignment Cancellation. The task remains in the **Edit Task** panel but the **Resource** field is empty.
- **Resend the assignment notification:** If you need to send an assignment notification again to a resource, click **More > Send Assignment Notification** in the **Edit Task** panel. Then send the notification from the **Send Assignment Notification** panel. See Notifying resources individually.
- **Turn in the related job:** Click **More > Turn In** in the Edit Job/View Job window. See Generating invoices.

TIP: Task shortcuts

In Tasks (List View), instead of clicking into a task to update it, there are 5 task functions you can access directly from the results pane: Click next to a job number and select:

- **New** to add a new task to the job.
- **View** to view the task in the **View Task** panel in its job.
- **Edit** to go directly to the task's **Edit Task** panel in its job.
- **Set Acknowledged Date** to record the current date and time as when the assigned resource acknowledged the job.
- **Clear Acknowledged Date** to remove the date and time listed in the **Acknowledged Date** column.

NEXT: Assigning resources vs. confirming jobs

If you pre-assign resources, you can assign them to tasks as you create the task or after you have saved the task. See Assigning resources. If you prefer to wait until you have confirmed a job before assigning resources, see Confirming jobs.

Reference

- Task
- Tasks (List View)
- Tasks (Monthly View)
- Date Navigator
- Lookup panel
- Jobs lists
- Resources lists
- Business Units
- Job Status Color preferences

Step-by-step instructions

- Searching task assignments
- Looking up resources
- Looking up cases
- Customizing grids
- Updating tasks
- Entering tasks
- Notifying resources individually
- Assigning resources to tasks
- Notifying resources individually
- Generating invoices
- Assigning resources
- Confirming jobs

Updating tasks

Update tasks with benchmark dates and other information as they progress and are completed. Upload files to the task-level repository and manage files in the repository.

Continued from Entering tasks, Monitoring & managing task assignments or Analyzing resources' workloads.

1. Update task

In the **Edit Task** panel's **General** pane, enter/update text and selections:

- ***Task**

  Required. Select new task type from the dropdown. Task types, including the default, are defined in Lists > Jobs. If you are changing the task to one with a different **Due Date,** a popup will appear asking if you want to update the current date. Click **Yes** to have RB9 calculate the date based on the new task. Click **No** to keep the same date, or if you want to enter a new date manually.

- ***Order Date**

  Uneditable once the task has been assigned. Date request for service was made.

- **Due Date**

  Deadline for the task. Due dates are calculated using the default deadlines set in the ordering firm's **Task Due Days** pane, or if the firm has no preferences set, from the assigned BU's **Task Due Days** pane. (See Entering default task deadlines.) You can override the default by editing the date or selecting a new one in the Date Navigator.

- **Use different task time from job time**

  If the task will start/end at a different time than the job slide to Yes.

- ***Start Time/*End Time**

  *Required when **Use different task time from job time** is set to Yes.* Default is job time. Enter different start and end times for the task as needed. RB9 automatically logs when a task's Start Time or End Time changes to the job's Notes Log.

  NOTE: Change task times manually if job times change

  If an assigned task has different start/end times from the job and the job time changes the system will display an alert to manually change the task time when you save the job time change. See Entering general job information.

- **Resource**

  To view/edit the resource: Click the **Resource** field's or **> View Resource.**

See Updating resources.

To remove the assigned resource from the task: If the resource has been assigned but not notified, you can click > **Remove Resource,** then click **Yes**.

To assign a new resource: If a resource has not been assigned, click to assign a resource. See Assigning resources to tasks.

NOTE: Canceling a task to remove a resource

If you sent the resource an assignment notification, you cannot remove the resource. Instead you have to cancel the task and re-enter it. When you cancel a task, RB9 will make an entry in the job's Notes Log about the canceled task and resource.

- **Resource Warning**

  If the assigned resource has a warning in their entry in RB9 it appears in this uneditable field. See Entering general resource information.

- **Notified Date**

  Date and time you notified resource of the job. Click to select a date in the Date Navigator and click to select a time in the drop-down. Once this information is saved, you cannot edit it.

- **Acknowledged Date**

  When the resource accepts a job via RB Connect, these date and time fields are filled automatically. If you do not use RB Connect, enter the date and time manually when the resource acknowledges the job.

TIP: Use shortcut to enter acknowledgments

You can have RB9 enter the time and date for you by finding the task in Tasks (List View) (see Searching task assignments). Then instead of clicking into a task to update it, click next to the task's job number and select **Set Acknowledged Date.** RB9 will fill in the current date and time as when the assigned resource acknowledged the job.

- **Cancelled**

  Uneditable. To cancel a task, click **More > Cancel Task** in the **Edit Task** panel. Then click **Yes** in the RB9 popup to notify the resource. See Notifying resources individually.

- **Check In Date**

  Date and time resource arrived at the job location. If resource checked in via RB Connect or RB Connect Mobile, these fields will automatically populate.

- **Status**

  Uneditable. To change the task's status, click > **Change Status.** In the **Change**

Status panel if ***Status to be** is blank or incorrect, select the new status from the drop-down *(required).* (Status options and default are set up in Lists > Jobs.) Enter any notes about the status change in **Remarks.** Remarks are stored in the Status History log. (To view the task's status changes, click ⋯ **> View Status History.)**

- **Estimated Pages**

  If the resource enters this information in RB Connect, it appears here automatically. Otherwise, enter the resource's estimate of the number of transcript pages manually.

- **Estimated Delivery Date**

  If the resource enters this information in RB Connect, it appears here automatically. Otherwise, enter the date resource predicts they will turn in the transcript/complete the task.

- **Turn In/Completed Date**

  Actual date and time the resource turned in the transcript/completes the task.

  NOTE: Automatically record task completion

  If you prefill parties when invoicing a job, you can quickly note which tasks have been completed to have RB9 fill in these fields automatically.

- **Notes**

  Any notes or other information that you want to record with the task. To customize the appearance of the notes, see Customizing notes & remarks.If you have RB Connect, your resource assigned to the task can see these notes in the **Remarks** field of the job in RB Connect and RB Connect Mobile.

2. Manage task files

In the **Repository** pane, to:

- **Add file(s)** – Click . See Uploading files to a repository.
- **Delete file(s)** – Check the box(es) of file(s) to delete, then click .
- **Download file(s)** – Check the box(es) of file(s) to download, then click . See Downloading & viewing files.
- **Re-classify files** – See Updating file values quickly.

3. Save task

1. In the **Edit Task** panel, click **Save.** The **Task** panel closes, and the updated task information appears in the **Task** pane of the Edit Job window.

2. If you changed resources, use Send Assignment Notifications/Cancellations to notify the resource.
3. In the Edit Job window, click **Save > Save & Edit** or **Save > Save & Close.**

Reference

- Task definition
- Tasks
- Jobs lists
- Notes Log
- Date Navigator
- RB Connect
- Prefill
- Send Assignment Notifications/Cancellations

Step-by-step instructions

- Entering tasks
- Monitoring & managing tasks
- Analyzing resources' workloads
- Entering default task deadlines
- Entering general job information
- Updating resources
- Assigning resources to tasks
- Entering general resource information
- Searching task assignments
- Notifying resources individually
- Prefilling parties & services
- Customizing notes & remarks
- Uploading files to a repository
- Downloading & viewing files
- Updating file values quickly

Assigning and pre-assigning resources

You can schedule resources for tasks either before or after jobs are confirmed by your clients. Resources include physical resources, such as your conference room.

There are several ways to assign resources to tasks in RB:

- **Within jobs**
  Assign resources to the task(s) from within each job.
- **By date**
  Use Quick Assignments *(RB9 Standard only)* to assign resources to all tasks scheduled for an upcoming date.
- **From Tasks functions**
  Use the Tasks (List View) or Tasks (Monthly View) to review assignments and assign resources to tasks that fit a particular criteria, such as a case, depos only, or all new jobs.

References

- Resources
- Quick Assignments
- Tasks
- Tasks (List View)
- Tasks (Monthly View)

Step-by-step instructions

- Assigning resources to tasks
- Quickly assigning for high volume of jobs
- Scheduling jobs
- Monitoring & managing task assignments

Assigning resources to tasks

You can assign resources to tasks as you enter the tasks in a job, or at any time before or after jobs are confirmed by your clients. You can also assign conference rooms to jobs as resources so that once scheduled, they are not available in RB9 for other jobs at the same time.

Continued from Entering tasks or Updating tasks.

1. In the **New Task/Edit Task** panel of a job, click next to **Resource.** (If a resource has already been assigned and notified, you cannot assign a new resource to the task. You have to cancel the task and set up a new task.)

2. In the **Assign Resource** panel, all available resources that fit the task's requirements are listed in the top grid, with preferred resources at the top, and the rest in order starting from closest to the job location. Availability is based on task time if task time is set. If not, availability is based on job time.

   If the job is part of a case, resources that have been previously assigned to jobs in the case are listed in the **Previous 30 Resources in the same Case** grid.

3. In the **Edit Task** panel, click next to **Resource.** (If a resource has already been assigned and notified, you cannot assign a new resource to the task. You have to cancel the task and set up a new task.)

4. In the **Assign Resource** panel's **Search By** pane, **Show Available Only** defaults to Yes. If the client requested any specific skills or expertise, they appear in the **Specialty** filter. Enter text or make selections to change the filters if needed, then click :

   - **Priority Level**

     Order of preference or availability. Priority levels, including the default, are defined in Lists > Resources.

   - **Resource Type**

     Profession(s) and/or other type of resource(s). Resource types, including the default, are defined in Lists > Resources.

   - **Specialty**

     Skills and/or expertise. Specialties, including the default, are defined in Lists > Resources.

   - **Resource**

     Specific resource name (can enter partial name).

- **Show Available Only**

  To override resource availabilty and double-book a resource, slide to No. See Overriding resource availability.

5. Click next to the resource you want and select:

   1. **Tasks in Progress**
      Before assigning the resource, check what their workload is. The **Tasks in Progress** panel shows all of the assignments the resource is currently working on. For a better idea of the resource's workload, look at the **Estimated Pages** column in addition to the number of jobs the resource has yet to turn in. See Tasks in Progress.

   2. **30-Day History**
      Before assigning the resource, see how often and to which jobs the resource has been assigned in the past month. Click **Close** in the **30-Day History** panel.

   3. **Assign**
      If the resource is not on the ordering firm/contact's list of blocked resources, RB9 assigns the resource, makes an entry in the job's Notes Log, and a popup appears asking if you want to send the resource an Assignment Notification (if their email address is in their RB9 file). If you want to:

      - **Send the resource an assignment notice now,** click **Yes.** See Notifying resources individually.
      - **Batch notify all assigned resources at once,** use Send Assignment Notifications/Cancellations. See Sending batch assignment notifications/cancellations.

      If the resource is on the client's list of blocked resources, a popup appears alerting you that the resource is blocked by the client. Click **OK.** RB9 will not assign the resource to the task.

6. Click **Save** in the **Edit Task** panel to close the panel.

IMPORTANT: Scheduling conference rooms to avoid double-booking
To avoid double-booking a room, in addition to selecting the room in Job Location, create a conference room task and assign the room to the task. See Scheduling conference rooms.

TIP: Assign resources quickly
Use Quick Assignments *(RB9 Standard only)* to drag and drop resources onto a list of jobs to assign them instantly.

NEXT: Notify resources
You can notify resources as you assign tasks or send out batch notifications, if desired, using Send Assignment Notifications/Cancellations. The Assignment Notification email assembles all of the pertinent information from a job request, including any instructions or remarks entered in the Resources Notification Notes field (see Entering additional job

information), into an easy-to-read worksheet. (You can customize or create your own worksheets in Tools > Form Templates.)

Reference

- Resources
- Preferred Resources
- Resources lists
- Tasks in Progress
- Assignment Notifications/Cancellations
- Notes Log
- Quick Assignments
- Form Templates

Step-by-step instructions

- Entering tasks
- Updating tasks
- Scheduling jobs
- Searching in RB9
- Overriding resource availability
- Notifying resources individually
- Sending batch assignment notifications/cancellations
- Scheduling conference rooms
- Send Assignment Notifications/Cancellations
- Entering additional job information

Overriding resource availability

When assigning resources, RB9 automatically removes resources from the Available Resources list who do not fit your search criteria for the task you are currently assigning. For example, if the task's date/time falls outside of a resource's schedule, the resource will not appear in the **Assign Resource** panel for the task. You can override RB9's available resource filter to access those resources and assign them.

1. When assigning resources, if you do not see a resource you want in the **Assign Resource** panel, slide **Show Available Only** to No in the **Search By** pane. See Assigning resources to tasks.
2. If you are looking for a particular resource, enter their name or partial name in the **Resource** field.
3. Click .
4. Click **> Assign** to the name of the resource you want to assign to the task.
5. In the **New Task/Edit Task** panel, click **Save.**
6. In the popup, click **Yes** to send the resource an assignment notification immediately or click **No** and alert them later. See Notifying resources.

Reference

- Resources

Step-by-step instructions

- Assigning resources to tasks
- Notifying resources

Notifying resources

You can notify resources individually when assigning a task/canceling a job, or send notices in batches by using Send Assignment Notifications/Cancellations. Notifications can be sent via text or email or both, and include attachments.

Step-by-step instructions

- Sending individual assignment notifications
- Sending batch assignment notifications/cancellations

Sending individual assignment notifications

There are 2 ways to send assignment notifications from within tasks:

- **New Task**

  If you assign a resource to a task while creating the task, when you click **Save** in the **New Task** panel, a popup appears asking if you want to send the assignment notification now (if you have the resource's email address on file in RB). Click **Yes.** Then select notification options and send the notice. See Notifying resources individually.

- **Edit Task**

  If you clicked **No** in the popup when assigning a resource to the task, you can send the notification as part of a batch, or when editing the job. You can also use this method to resend an assignment notification:

  1. In the job's Edit Job window, scroll or jump to the **Tasks** pane.
  2. Click the hyperlinked task to send a notice about.
  3. In the **Edit Task** panel, click **More > Send Assignment Notification.**
  4. Select notification options and send the notice. See Notifying resources individually.

NEXT: Recording acknowledgements

When a resource acknowledges an assignment, enter that information in the assigned task's **Edit Task** panel of the relevant job. See Logging resources' acknowledgements.

Reference

- Resource
- Task

Step-by-step instructions

- Entering tasks
- Notifying resources individually
- Sending batch assignment notifications/cancellations
- Logging resources' acknowledgements

Attaching files to notifications automatically

When notifying resources either when assigning a task or when using Send Assignment Notifications/Cancellations, you can attach additional files manually. (Resource worksheets are attached automatically.) However, save time and never miss a file by setting RB9 up to automatically send certain types of files for you. You can delete automatically attached files on an email-by-email basis (see Composing emails & text messages).

1. Create file types

1. **Setup > Lists**
2. Click **Repository.**
3. Click **File Type.**
4. RB9 includes a set of default file types, including Notice. Create additional types or update existing ones, if desired. See Customizing lists.

2. Attach files types to email type

1. **Setup > System Preferences**
2. Click **Calendar.**
3. Click **Assignment Notification.**
4. In the **Calendar-Assignment Notification** panel, click **Edit.**
5. Click in the **File types to be automatically attached to email from Job-level and Case-level repository** field and select Notice (or your custom file type) in the drop-down.
6. Repeat step 4 to add additional file types to automatically include in assignment notification emails.
7. Click **Save.**

3. Designate file type in repository

1. In an Edit Job window, scroll or jump to **Repository** pane.
2. Click .
3. Add file(s). See Uploading files to a repository.

4. When setting file options in the **New Repository** panel, select Notice (or your custom file type) in the **File Type** drop-down. RB9 will attach the file automatically to the assignment notification email the resource gets from the office.

TIP: Resource Worksheets can be attached or embedded

Forms like assignment notifications, AKA Resource Worksheets, are already set up in RB9 to be automatically attached to notification emails. You can choose to have them attached, embedded or both in System Preferences > Calendar. See Customizing communications.

Reference

- Send Assignment Notifications/Cancellations
- Resource Worksheets
- Repository lists
- Calendar preferences

Step-by-step instructions

- Assigning and pre-assigning resources
- Sending individual assignment notifications
- Sending batch assignment notifications/cancellations
- Composing emails & text messages
- Customizing lists
- Customizing communications
- Uploading files to a repository
- Customizing communications

Logging resources' acknowledgements

When a resource acknowledges an assignment through RB Connect, RB9 automatically enters the date in the task assigned. If you don't use RB Connect, enter that information in the assigned task's **Edit Task** panel of the relevant job.

1. If not already in a New Job/Edit Job window, find the job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)** and open the job. See Scheduling jobs or Searching in RB9.
2. In the View Job window, click **Edit.**
3. In the Edit Job window, scroll or jump to **Tasks** pane.
4. In the **Tasks** pane, find the task that the resource has acknowledged and click the task's hyperlink.
5. In the **Edit Task** panel, type in the date in **Acknowledged Date** or use the Date Navigator to enter the date.
6. Enter the time or click and select the acknowledged time in the drop-down.
7. Click **Save.**

TIP: Use shortcut to enter acknowledgments

Use Tasks (List View) to find a task (see Searching task assignments). Then instead of clicking into a task to update it, click next to the task's job number and select **Set Acknowledged Date** to record the current date and time as when the assigned resource acknowledged the job.

Click **> Clear Acknowledged Date** to remove the date and time listed in the **Acknowledged Date** column.

Reference

- RB Connect
- Date Navigator

Step-by-step instructions

- Notifying resources
- Sending individual assignment notifications
- Sending batch assignment notifications/cancellations
- Scheduling jobs
- Searching in RB9
- Searching task assignments

Resource Worksheets

Customizable assignment notifications, AKA **resource worksheets,** include everything a reporter or other resource needs to know about an assigned task.

Reference

- Date Navigator
- Calendar preferences
- Tools > Form Templates

Step-by-step instructions

- Sending individual assignment notifications
- Sending batch assignment notifications/cancellations
- Creating/updating forms & letters
- Emailing & texting from RB9
- Attaching files to notifications automatically

Managing resources' availability

View your resources' availability for a certain period. Quickly add or remove hours from a resource's schedule. Track resources' planned time off, such as vacations or personal days. During these scheduled times off, their names do not appear in the list of available resources when assigning jobs.

The work schedule in Resource Availability is color coded so you can easily track resources' schedules, including job assignments, available/unavailable times, and time off. When granting time off, you can include reasons for it and any notes or comments about it for your records.

Use the Change Availability option to add time to resources' schedules when they are willing to work extra hours for a month, or quickly block out time off for a resource if you do not need to keep track of the reason.

1. View availability

Find the resource(s) to check their availability:

1. **Calendar > Resource Availability**
2. In the **Search By** pane, change the filters as needed:

   - ### Date From/Date To

     Default to today. Change date range, if desired (see Date Navigator).

   - ### Resource

     Default is all resources. To see a single resource's availability, click and find the resource in the **Lookup Resource** panel. See Looking up resources.

   - ### Priority Level

     Order of preference or availability. Default is ALL. To restrict search to one or more levels, click to make selections in the **Lookup Priority Level** panel. Priority levels, including the default, are defined in Lists > Resources.

   - ### Resource Type

     Profession, e.g., Reporter, Scopist or Videographer; or other resource, e.g., Conference Room. Default is ALL. To restrict search to one or more types, click to make selections in the **Lookup Resource Type** panel. Resource types, including the default, are defined in Lists > Resources.

   - ### Specialty

     Distinguishing trait or unique skill, e.g., RealTime or Spanish. Default is ALL. To restrict search to one or more specialities, click to make selections in the **Lookup Specialty** panel. Specialties, including the default, are defined in Lists > Resources.

- **Resource City**

  Enter part of a city name to find resources in a specific city.

- **Time-Off Remarks**

  Comments/notes about time off granted.

3. Click . RB9 displays resources' availability for the specified period and other search criteria in the Resource Availability results grid. The time sheet starts at midnight, with 1-hour increments indicated over a 24-hour period.

   Color-coded bars represent time usage:

   - **Yellow** – available time
   - **White** – unavailable time
   - **Blue** – already-assigned time slots
   - **Red** – time off

2. Manage availability

From the results grid, click a resource's **>**

- **Change Availability**

  To quickly change a resource's availabilty in a single day without tracking the reason.

  In the Change Availability window, the **Resource, Date** and **Day of the Week** selected are listed, and the related **Current** availability is shown with color-coded bars on a 24-hour scale.

  1. Click and drag the beginning and end dots on the **Change To** slider to update the resource's availability for the date displayed.
  2. Click **Save.** The resource's revised Available time appears as a yellow bar in the Resource Availability grid.

- **Add Time-Off**

  To note a resource's time off in RB9 for tracking purposes and so they do not appear in the **Assign Resource** panel during their time off. See Adding time off.

- **View Time-Off**

  In the View Time-Off window, you can review any **Remarks** about the resource's time off. Click **Edit** to change the **Time-Off Reason** or **Remarks.** Click **Save/Close.**

- ### Remove Time-Off

  To cancel the resource's previously scheduled time off, click **Yes** in the popup. RB9 removes the time off, restoring the resource's default availabilty.

NOTE: Merged resources retain availability changes

If you merge a resource that has a changed availability — such as a time-off period you already entered into RB9 — into another resource that changed availability will be copied into the Merge To resource. See Merging data.

Reference

- Date Navigator
- Resources lists

Step-by-step instructions

- Assigning and pre-assigning resources
- Searching in RB9
- Adding time off
- Adding resources to RB9
- Merging data

Adding time off

Track resources' planned time off, such as vacations or personal days. During these scheduled times off, their names do not appear in the list of available resources when assigning jobs.

Continued from Managing resources' availability.

1. After selecting **Add Time-Off** for a resource in the Resource Availability window, the Add Time Off window appears, Enter text or make selections:

   - ***Start Date**

     Required. Defaults to today. Change to first date of the time-off range granted, if needed.

   - ***End Date**

     Required. Defaults to today. Change to last date of the time-off range granted, if needed.

   - ***Start Time**

     Required. Defaults to 9 AM. Select a different beginning time, if needed.

   - ***End Time**

     Required. Defaults to 5 PM. Select a different end time, if needed.

   - **Time-Off Reason**

     Reason for blocking out this time. (Options and default are set up in Lists > Resources.)

   - **Remarks**

     Comments/notes about the time off granted.

2. Click **Save.** The scheduled time off range appears as a red bar and reason selected appears in the **Time-Off Reason** column.

NOTE: Time off vs. changing availability

Use **Add Time-Off** if you want to track resource's vacations, holidays, and personal time off. If you do not need to know the reason for time off, for example, for a conference room, use **Change Availabilty.**

Reference

- Date Navigator
- Resources lists

Step-by-step instructions

- Assigning and pre-assigning resources
- Searching in RB9
- Adding resources to RB9

Quickly assigning for high volume of jobs

RB9 Standard only

After confirming tomorrow's jobs, assign resources to related tasks by dragging and dropping them in Quick Assignments. You can also use this function to assign resources to jobs for other days, past and future.

TIP: Assign resources on paper first

You can save time when assigning resources by printing out your upcoming calendar with Job Printout, writing your resources on your calendar, then using Quick Assignments to apply your assignments to your job calendar in RB9. See Printing job calendar back-ups.

1. View tasks

1. **Calendar > Quick Assignments**
2. Click to begin assigning tomorrow's jobs. Or change the search criteria:
   - **Date Type** – Default is Job Date. Select Order Date in the drop-down to search by date for write-ups ordered for previously billed non-transcribed jobs.
   - ***Date** *(required)* – Default is tomorrow. Click to select a different date in the Date Navigator.
   - **Task** – Service(s) requested. Default is ALL. Click to restrict search to specific tasks (see Lookup panel).
   - **Business Units** – Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.
3. RB9 lists all of the tasks for the next day color coded by the related job's job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.) Basic information about the job and task, including task notes and task start/end times, are visible in the results grid. View any task's details by clicking its hyperlinked job number.

   ### TIP: Set up the results grid to work for you

   The Quick Assignments function'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.

2. Find & assign resources

1. You can select resources in several ways:

   - **Previously assigned resource:** To find resources that were previously assigned to jobs on the same case as a job listed, click next to the **Job No.** in the results grid and select **Previous Resources** in the dropdown. In the popup that appears, click next to the resource you want to assign and select **Assign** in the dropdown.

   - **Preferred resource:** If you maintain preferred resource lists for firms and contacts you can save time in Quick Assignments by clicking next to a **Job No.** in the search results and select **Preferred/Blocked Resources.** In the Preferred/Blocked Resources popup, the ordering firm's preferred resources are listed first in the **Preferred Resources** pane followed by the ordering contact's preferred resources. If a preferred resource is available you can click their radio button, then click **Assign.**

   - In the ***Resource Name** field in the **Find Resources** pane, type part of the resource name, then press **Enter** (or click). RB9 lists all of the resources that include the text entered. Click and drag a resource to a task in the results pane to assign the resource to that task.

2. If the resource is:

   - **On the ordering contact/firm's Blocked Resources list,** a popup will alert you, and RB9 will not allow you to assign the resource. Click **OK.**

   - **Not available during the task's time period,** a popup will appear warning you and asking if you still want to assign the resource to the task. Click:

     - **Yes** to double-book the resource. In the results pane, you can remove the resource from an assignment by clicking next to the job number and selecting **Remove Resource.**

     - **No** to return to the main window without assigning the resource.

   ### TIP: Avoid blocked resources

   Instead of attempting to assign a resource only to find them blocked, before entering a resource's name in the **Find Resources** pane click next to the **Job No.** in the results pane and select **Preferred/Blocked Resources.** In the Preferred/Blocked Resources popup, the ordering firm's blocked resources are listed first in the **Blocked Resources** pane followed by the ordering contact's blocked resources. You can then close the popup and assign a resource that didn't appear in these lists.

3. RB9 assigns the resource and makes an entry in the Notes Log of the related job. A popup appears asking if you want to send an assignment notification to the resource

if you have the resource's email address and/or mobile phone number on file. If you want to send notifications:

- **Individually as you go,** click **Yes** and see Notifying resources individually.
- **As quickly as you assigned them by sending notices in batches,** click **No** and see Sending batch assignment notifications/cancellations.

4. Repeat finding and assigning resources until you have assigned resources to all tasks.

Reference

- Job Printout
- Date Navigator
- Lookup panel
- Business Units
- Job Status Color preferences
- Preferred Resource

Step-by-step instructions

- Printing job calendar back-ups
- Customizing grids
- Assigning and pre-assigning resources
- Assigning resources to tasks
- Overriding resource availability
- Notifying resources individually
- Sending batch assignment notifications/cancellations

Sending urgent requests for help

RB9 Standard only

Have you ever panicked looking for a reporter for a job called in at the last minute? How would you find someone who lives close to the job location and is willing to take the job without spending hours on the phone? Send an urgent job alert out to a group of resources based on a series of parameters.

1. View resources

1. **Calendar > Resource Blast**

   ### TIP: Access Resource Blast from Jobs (List View)

   If you are already in the Jobs (List View) results grid, you can access Resource Blast in the list of options under individual jobs' shortcuts button. For a job you want to send a blast to resources for, click its **> Resource Blast** option. See Searching jobs.

2. In the Resource Blast window's **Search By** pane, enter or change search criteria:

   - ***Job No.**

     Required. Enter the job number of the job that needs a resource.

   - **Miles within Job Location**

     Default is 20 miles. Enter a new number or press to increase or decrease the range by 1 (longest distance for a physical location is 100 miles). Delete the default number (leave the field blank) when the job location is Online Meeting.

   - **Resource State**

     To restrict the search to specific states, click to select a state or states in the Lookup State popup. See Lookup panel.

   - **Priority Level**

     Order of preference or availability. Priority levels, including the default, are defined in Lists > Resources.

   - **Resource Type**

     Profession(s) and/or other type of resource(s). Resource types, including the default, are defined in Lists > Resources.

   - **Use Job Specialties**

     Default is Yes. Results will include only resources whose skills and/or expertise match the specialties requested for the job. Slide to No if you want to include

resources in the results regardless of their listed specialties. Specialties, including the default, are defined in Lists > Resources.

- **Show Available Only**
  Default is Yes. Slide to No to include resources that have already been assigned to tasks that conflict time-wise with this new job.

3. Click . RB9 lists all of the available resources that meet your search criteria.

2. Send message blast

1. Select resources to alert via email, text message, or both:
   - **To send an email blast,** check the **Email** box at the top to send an email to all of the resources listed, or check individual resources' boxes.
   - **To send an SMS text-message blast,** check the **SMS** box at the top to send a text message to all of the resources listed, or check individual resources' boxes.
2. Click **Send.**
3. In the **Email/SMS** popup, different options appear depending on whether you choose to send blasts via email, text message, or both.
4. If you selected **Email** in the Resource Blast results grid for some/all resources, you can:
   - Change the email address you are sending the blast from by clicking the default address in the ***Email/SMS From** drop-down and selecting a different address. Email addresses and the default are set in System Preferences > General > Email.
   - Choose a different template from the default in the ***Email Template** dropdown. (Email templates and the default are set in System Preferences > Calendar > Resource Blast.)
   - Edit the ***Email Subject** and/or **Email Message** for this time only. See Customizing emails, messages, web pages, & stamps.
   - If this is an important job, slide **Important** to Yes.
5. If you selected **SMS** in the Resource Blast results grid for some/all resources, you can:
   - Choose a different template from the default in the ***SMS Template** dropdown. (SMS templates and the default are set in System Preferences > Calendar > Resource Blast.)
   - Edit the ***SMS Subject** and/or **SMS Message** for this time only. See Customizing emails, messages, web pages, & stamps.

6. Click **Send.** RB9 sends the blast.
7. Click **OK** in the popup that appears when the messages have been sent. RB9 notes the success of its emailing for each resource in the **Result** column.

Reference

- Lookup panel
- Resources lists
- Email preferences
- Resource Blast preferences

Step-by-step instructions

- Searching jobs
- Customizing emails, messages, web pages, & stamps

Sending batch assignment notifications/cancellations

Save time by sending assignment notifications (resource worksheets) or cancellations in batches, instead of one at a time. Notifications can be sent via text or email or both. You can also print out notifications.

1. Find resources to notify

1. **Calendar > Send Assignment Notifications/Cancellations**
2. In the **Search By** pane:
   - **Notification Type**

     Defaults to Assignment.

     Change to Cancellation to send task cancellation notices.
3. Enter search parameters/make selections in one of these fields:
   - **Date Type**
     - **Job Date** – *Assignment only.* Scheduled job date.
     - **Order Date** – *Assignment only.* Date job orders were placed.
     - **Task Cancel Date** – *Cancellation only.* Date the scheduled job was canceled.
   - **Date From/Date To**

     Click in these fields to enter a date range (see Date Navigator). Limited to a 30-day search range.

     TIP: For specific date, not date range, leave one field blank

     Instead of entering the same date twice when you want to search for information about a single day, enter the date in only one field and leave the other field blank. When you search, RB9 will autofill the blank field with the entered date.
   - **Job No.**

     Job number to send notifications for a single job
4. Enter optional search parameters, if desired:
   - **Task**

     Parts of jobs requiring separate resources. Default is ALL. Click to restrict search= to specific tasks (see Lookup panel). Task options are set in Lists > Jobs.

- **Resource Type**

  Categories of professions required for jobs, e.g., Reporter, Scopist, or Videographer; or other resources, e.g., Conference Room. Default is ALL. Click to restrict search to specific resource types (see Lookup panel). Resource type options are set in Lists > Resources.

- **Job Type**

  Categories of jobs requested by clients. Default is ALL. Click to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

5. Click . In the results pane, RB9 lists all of the assigned tasks that meet the search criteria color coded by the related job's job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.)

2. Select contact method(s)

1. Check the box(es) at the top of the results grid of the contact method column that you will use for sending assignments/cancellations to most of the resources listed. You can check both **Email** and **SMS** boxes to use both contact methods at once:

   - **Email**

     For sending messages to resources' email addresses that include worksheets/notifications and can include additional attached files.

   - **SMS**

     For sending text messages to resources' cellphones.

   - **Print**

     If you want to print out notifications, see Batch printing assignment notifications/cancellations.

2. Uncheck/check the contact method box(es) for any resource(s) that you want to contact via the other method.

   If a result does not have a contact method checkbox, either:

   - *(Assignment only)* The task has not been assigned. Click the hyperlinked task to assign a resource. See Assigning and pre-assigning resources.

   - The resource is missing contact information in their profile. Click the hyperlinked task to add the resource's contact information to their profile. See Entering general resource information.

3. Send messages

1. Click **Send.**
2. To finalize and send the message, see Emailing & texting from RB9.

   (Assignment only.) To automatically include notices or other types of files from your job repository, see Attaching files to notifications automatically.

   ### NOTE: Attached file size limitation

   RB9 will automatically attach repository files only if the attachment does not exceed 20MB.

3. RB9 sends each worksheet by the method(s) selected for that resource. Click **OK** again in the popup that appears when the message is sent. R9 notes the method used and the success of its send method for each notification in the **Result** column. RB9 also records the date and time in the task's **Notified Date** field in the job, and makes an entry in the job's Notes Log and RB9's Email Log *(RB9 Standard only)*.

TIP: Include iCalendar file with assignment notification emails

You can automatically include iCalendar files with notification emails by choosing that option in System Preferences > Assignment Notification. See Customizing communications.

TIP: Preview notifications

If you want to quickly check a worksheet before sending it, click **> Preview Assignment Confirmation/Cancellation** next to its **Job No.** in the Send Assignment Notifications/Cancellations window. In the Options popup, select a form in the **Form** drop-down and click **OK.** RB9 will display the worksheet with the assignment details filled in. Do not edit the form here.

NOTE: Customize your notifications

Update the RB9 default messages, worksheets, and attached file types:

- **Email & SMS Messages** – Setup > System Preferences > Calendar > Assignment Cancellation / Assignment Notification.
- **File types to automatically attach** – Setup > System Preferences > Calendar > Assignment Notification.
- **Worksheets/notification forms** – Tools > Form Templates.

NEXT: Recording acknowledgements

(Assignment only) When a resource acknowledges an assignment, enter that information in the assigned task's **Edit Task** panel of the relevant job. See Logging resources' acknowledgements.

Reference

- Lookup panel

- Jobs lists
- Business Units
- Job Status Color
- Assignment Cancellation preferences
- Assignment Notification preferences
- Form Templates
- Email preferences
- Notes Log
- Email Log

Step-by-step instructions

- Sending individual assignment notifications
- Entering dates
- Searching in RB9
- Entering additional job information
- Batch printing assignment notifications/cancellations
- Assigning and pre-assigning resources
- Entering general resource information
- Creating/updating forms & letters
- Emailing & texting from RB9
- Attaching files to notifications automatically
- Customizing communications
- Logging resources' acknowledgements

Batch printing assignment notifications/cancellations

Print assignment notifications (resource worksheets) or cancellations to hand out, mail, or for your files.

Continued from Sending batch assignment notifications/cancellations.

1. In the **Send Assignment Notifications/Cancellations** window, check the **Print** box at the top of the results grid to select all jobs listed, or check the box(es) for individual job(s).
2. Click **Print.**
3. In the **Options** popup, **Form Type** is uneditable, and the default **Form** comes from Tools > Form Templates:

   - **Form Group/Form**

     Select options in these drop-downs for a different form than the default. To modify RB9's default templates or create additional ones, see Creating/updating forms & letters.

4. Click **OK.** RB9 opens the Assignment Notifications/Assignment Cancellations window with a worksheet for each resource.
5. Review and edit the worksheet(s), if needed. Click a tab to access tools to edit the worksheet(s):

   - **Home**
     Default view. To customize the formatting using the tools in this tab, see Editing form Home options
   - **Insert**
     To add headers, footers, page numbers, images, graphics, pages, page breaks, tables, special symbols, hyperlinks, and text frames, see Editing form Insert options.
   - **Layout**
     To set page options like margins, orientation, columns, backgrounds, 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.
   - **Table Tools**

     In tables only.

     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 worksheet has graphics in it, such as your company logo, this tab appears. To set options for how graphics appear in your form, see Editing form Frame Formatting options.

NOTE: Editing the form here doesn't change the template

Changes to the form in the Assignment Notifications/Assignment Cancellations window change the current form only. If you want to update the information permanently, you must make the change in the Assignment Notification/Assignment Cancellation form template. See Creating/updating forms & letters.

6. Click **File >**

   - **Print**
     To print the worksheet(s) using your own printing application and printer.

   - **Export**

     To export the worksheet(s). Select an export file type in the Select Format popup, then click **Save.**

7. Click **Close.**

Reference

- Tools > Form Templates

Step-by-step instructions

- 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
- Creating/updating forms & letters

Auditing new and canceled jobs

View new job settings by date to check for errors. View canceled jobs to look for trends and see if you can reduce cancellations.

1. View jobs

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

   - ### Audit Type

     New – Refers to the date job was entered into the Calendar, not its Job Date.

     Cancellation – Refers to date job was canceled, not its Job Date.

   - ### Date From/Date To

     Default is today. Change date range, if desired (see Date Navigator).

   - ### Job Type

     Categories of jobs requested by clients. Default is ALL. Click to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

   - ### How Referred

     The way(s) clients heard of you. Default is ALL. Click to restrict search to specific categories of referrals in the **Lookup How Referred** panel (see Lookup panel). Job type options are set in Lists > Jobs.

   - ### Business Units

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. View details

RB9 lists all of the jobs that meet the specified search condition(s). Listings are color coded based on their job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.)

The Daily Calendar Audit function'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.

If you want to view details or make changes to a job, click its **Job No.**

3. ## Export/print results

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

BEST PRACTICES: Audit new jobs daily

At the end of each day, spend a few minutes auditing new job settings for errors. In particular, look for any job that is in the past or too far in the future. Sort the grid by the Job Date column so that you can scan down the list quickly.

Reference

- Jobs
- Date Navigator
- Jobs lists
- Business Units
- Job Status Color preferences

Step-by-step instructions

- Scheduling jobs
- Searching in RB9
- Customizing lists
- Customizing grids
- Exporting & printing results

Sending clients their job calendars

RB9 Standard only

A valuable service you can provide to clients with virtually no effort on your part: Sending clients their future job calendars by email so they can keep track of upcoming jobs.

1. View future calendar

1. **Calendar > Send Future Calendar**
2. Click in the **Search By** pane to see all upcoming jobs in your calendar for the next 30 days, or use the **Search By** filters to restrict the results before clicking :

   - **Send To**

     Default is Firm. Will display upcoming jobs by firm in descending order of number of jobs scheduled.

     Select Contact to view jobs by contact.

   - **Firm**

     Limit results to a single firm by selecting the firm (see Searching in RB9).

   - **Contact**

     Default is ALL. To limit results to single contact at a firm, select the firm first, then select the contact from that firm in the drop-down.

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

     Required. Job date default is from tomorrow to 30 days in the future. Change date range, if desired (see Date Navigator).

   - **Job Status**

     Stage the job is in, e.g., New or Cancelled. Default is ALL. Click to restrict the results (see Lookup panel). Job status options are set in Lists > Jobs.

   - **Case**

     Click to look up and select a case (see Looking up cases).

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. Prepare results

In the results pane, check the box(es) of the firm(s)/contact(s) you wish to send future calendars to.

- If you want to preview a client's job calendar, click the hyperlinked number in the **Total Jobs** column.
- If a result does not have a checkbox, the firm/contact is missing an email address in their profile. Click the hyperlinked name to add their email address to their profile.

3. Send email

1. Click **Send.**
2. To finalize and send the email, see Emailing & texting from RB9.
3. RB9 sends the email with the job calendar as a PDF attachment and logs the email in the Email Log. Click **OK** again in the popup that appears when the email is sent.

Reference

- Date Navigator
- Jobs lists
- Business Units
- Email preferences
- Email Log

Step-by-step instructions

- Searching in RB9
- Customizing lists
- Emailing & texting from RB9

Printing job calendar back-ups

View your job calendar as a report. Use filters to specify a date range, or restrict the report to specific job statuses or types, a particular firm or case, etc. Export or print out your reports. Use the printout to manually assign resources, then enter your work in Quick Assignments *(RB9 Standard only)*.

1. View job calendar

1. **Calendar > Job Printout**
2. Click in the **Search By** pane to see all jobs in your calendar for tomorrow, or use the **Search By** filters to restrict the results before clicking :

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

     Required. Default is tomorrow. Change date range, if desired (see Date Navigator).

   - **Job Status**

     Stage the job is in, e.g., New or Cancelled. Default is ALL. Click to restrict the results (see Lookup panel). Job status options are set in Lists > Jobs.

   - **Job Type**

     Categories of jobs requested by clients. Default is ALL. Click to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

   - **Firm**

     To restrict results to one firm, see Looking up firms.

   - **Case**

     To restrict results to a single case, see Looking up cases.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

   - **Show Tasks**

     Default is to create the report with task details included. Slide to No to create a report without tasks.

   - **Show Scheduling Notes**

     Default is to create the report without these notes. Slide to Yes to create a report

with these internal notes. See Entering additional job information.

- **Show Confirmation Notes**

  Default is to create the report without these notes. Slide to Yes to create a report with remarks for the client that appear on Confirmation emails. See Entering additional job information.

- **Show Resource Notification Notes**

  Default is to create the report without these notes. Slide to Yes to create a report with any instructions or remarks for the assigned resource(s) that appear on Assignment Notification emails. See Entering additional job information.

2. **Export/print results**

   RB9 lists all of the jobs that meet the specified search condition(s) as a report that includes each job's details, including any Specialties and Requested Services, and any related notes.

   Essential job information, such as date, time, job type, notations, and ordering client are in the header of each job, which also makes it easier to distinguish between jobs on the page.

   If a job entry doesn't fit at the end of a page, the entire job entry is moved to the next page so there are no entries split between pages.

   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. Use the printout to assign resources to tasks by writing them on the printout, then refer to it to assign resources in RB9 fast using Quick Assignments *(RB9 Standard only)*.

Reference

- Quick Assignments
- Date Navigator
- Lookup panel
- Jobs lists
- Business Units

Step-by-step instructions

- Looking up firms
- Looking up cases
- Entering additional job information
- Printing invoices, statements & reports

Knowing who is calling

RB9 Standard only

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

1. Set parameters

1. **Calendar > Job Analysis**
2. Change the search filters as needed, then click .

- ### View Option

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

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

- ### Show Quarterly

  By Month only

  No – Default. When viewing the report with **Expand/Collapse > Expand Date,** jobs will be displayed by month and year only.

  Yes – When viewing the report with **Expand/Collapse > Expand Date,** jobs will be displayed by month, quarter, and year.

- ### Sort By

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

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

- ### Date Type

  Entered Date – Default. Displays jobs that were entered into RB9 in the **Date From/Date To** range.

  Job Date – Displays jobs scheduled to take place during the date range.

- ### Date From/Date To

  Works with **Date Type.** Date range defaults to 30 days ago to today. Change date range, if desired (see Date Navigator).

Job Type

Categories of jobs requested by clients. Default is ALL. Click ▣ to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

- ### Firm

  Leave blank unless you want to analyze the job settings for a particular firm. To select a firm, see Looking up firms.

- ### Case

  Leave blank unless you are analyzing job settings for a particular case. To select a case, see Looking up cases.

- ### Business Units

  Profit centers or parts of your business you track separately. Default is ALL. Click ▣ to restrict search to job settings tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. ## View report

   RB9 totals new, canceled, and net jobs in the calendar by firm, broken down by contact, so you can see how many calendar settings you are getting from each client. Net jobs 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.

BEST PRACTICES: Holiday gift list

The best way to come up with a meaningful holiday gift list is to run the Job Analysis report sorted by the number of net jobs. 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
- Jobs lists
- Business Units

Step-by-step instructions

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

Analyzing resources' workloads

View all resources' outstanding tasks, grouped by resource, or use search filters to see a single resource's To-Do list, jobs outstanding on a case, or other criteria. Customize the results grid to show information in the order that works best for you, including grouping tasks by additional/different criteria. For example, group by case then resource to see who is working on what in each case.

Also, update tasks with benchmark dates and other information as they progress and are completed. You can even begin turn in from the job detail window.

1. View outstanding tasks

1. **Calendar > Tasks in Progress.**
2. In the **Search By** pane, **Order Date To** defaults to today. Change the search filters as needed:

   - ### Order Date From/Order Date To

     An order date is either the job date or the date a write-up was ordered for a= previously billed non-transcribed job. Default is all days up to today. Change date= range, if desired (see Date Navigator).

   - ### Due Date From/Due Date To

     Deadline date or date range to see which outstanding tasks you are expecting= from your reporters by a specific date.

   - ### Job Type

     Categories of jobs requested by clients. Default is ALL. Click to restrict search to= specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

   - ### Task

     Parts of jobs requiring separate resources. Default is ALL. Click to restrict search= to specific tasks (see Lookup panel). Task options are set in Lists > Jobs. Tasks= that have been set to "No Turn-in" in Lists > Jobs, such as your conference rooms,= will not appear in Tasks in Progress.

   - ### Resource

     Default is all resources. To see a single resource's To-Do list, click and find the= resource in the **Lookup Resource** panel. See Looking up resources.

   - ### Firm

     Click to restrict search to tasks for one firm's jobs. See Looking up firms.

- **Contact**

  Click ▣ to restrict search to tasks for one contact's jobs. See Looking up contacts.

- **Case**

  Click ▣ to restrict search to tasks for one case (see Looking up cases).

- **Show completed tasks if Job Status is still Turned In**

  Default is No. If you want the search results to include tasks that have been finished, but whose jobs haven't been invoiced yet, slide to Yes.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click ▣ to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

3. Click . RB9 lists all of the tasks that meet the specified search condition(s) color coded by the related job's job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.) If you did not search for a single resource, the default is that all tasks are grouped by resource, with each resource's tasks' **Average Days Old** and **Total Estimated Pages** listed in the footer of their task grouping.

   At a glance, you can see:

   - **Resource**

     Who was assigned the task.

   - **Job number and type**

     To view more details, click the hyperlinked job number.

   - **Job date, order date, due date and turned in date**

     Job date and order date are usually the same, but can be different if, for example, a depo was taken but a transcript was not ordered until later.

   - **Number of days since the job occurred (Days Old)**

     The **Days Old** column is calculated using the number of business days since the **Order Date.**

   - **Assigned task**

     What the resource was assigned to do.

   - **Current status of the assigned task**

     Where the task is in your production cycle.

   - **Job Type**

     Category that the job belongs to.

- **Current job status for each job**

  See Changing case or job status.

- **Case**

  If the job is part of a case.

- **Ordering firm and contact**

  The client who requested the job.

- **Estimated number of pages (if applicable)**

  For a better idea of any resource's workload, look at the **Estimated Pages** column in addition to the number of jobs the resource has yet to turn in.

- **Estimated delivery date**

  Date appears if the resource entered this information in RB Connect, or your staff entered it in RB9 (see Updating tasks).

- **Business unit**

  Part of your business responsible for invoicing the job.

- **Witness**

  If the job was a depostion, name of the person deposed.

TIP: Set up the results grid to work for you

The Tasks in Progress function's results grid layout is customizable. The default grid groups tasks by resource, but you can add other criteria to group by, arrange the grouping order, and delete grouping criteria. See Grouping 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. You can save your custom grid layout or return to the default layout. See Customizing grids.

2. View details & update tasks

View job and task details. Update task milestones and other information.

1. In the Tasks in Progress results grid, click a **Job No.** hyperlink to view details. RB9 opens the selected job's View Job window scrolled to the **Tasks** pane.
2. To update tasks, click **Edit** in the View Job window.
3. In the **Tasks** pane, click a hyperlinked task to update. See Updating tasks.
4. If the job is ready to turn in, click **More > Turn In.** See Generating invoices.

NOTE: Automatically record task completion

If you prefill parties when invoicing a job, you can quickly note which tasks have been completed to have RB9 update Tasks in Progress for the job automatically. If you do not note completed tasks that way, then manually update tasks to keep resource workload reports accurate.

Reference

- Tasks
- Date Navigator
- Lookup panel
- Business Units
- Jobs lists
- Business Units
- Job Status Color preferences
- RB Connect
- Prefill

Step-by-step instructions

- Looking up resources
- Looking up firms
- Looking up contacts
- Looking up cases
- Changing case or job status
- Grouping results
- Customizing grids
- Updating tasks
- Generating invoices
- Prefilling parties & services

Sending overdue task reminders

You can send Overdue Task Reports via email to all resources, selected resources, or a single resource. When you send a resource an Overdue Task Report, RB9 automatically logs it in the resource's Notes Log and the Email Log *(RB9 Standard only)*.

1. Find resources to notify

1. **Calendar > Send Overdue Tasks Report**
2. In the **Search By** pane, click to view all overdue tasks by all resources, listed in descending order starting from the resource with the most overdue tasks. Or change the search filters before clicking :

   - **Resource**

     To find a single resource's overdue tasks, see Looking up resources.

   - **Job Type**

     Categories of jobs requested by clients. Default is ALL. Click to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

   - **Task**

     Parts of jobs requiring separate resources. Default is ALL. Click to restrict search to specific tasks (see Lookup panel). Task options are set in Lists > Jobs. Tasks that have been set to "No Turn-in" in Lists > Jobs, such as your conference rooms, will not appear in the report.

   - **Case**

     To search for overdue tasks for a case, see Looking up cases.

   - **Task Due Date From**

     Click to select a beginning date for a date range search in the Date Navigator.

   - ***Task Due Date To**

     Default is yesterday. Click to select a different cutoff date in the Date Navigator.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. Select resources

In the results pane, RB9 lists all of the resources with overdue tasks that meet the search criteria.

1. Check the box at the top-left of the results grid to select all resources.
2. Uncheck the box for any resource that you do not want to send a report to.

NOTE: Missing checkbox

If a resource does not have a contact checkbox, the resource is missing an email address in their profile. Click the hyperlinked name under **Resource** to add the resource's contact information to their profile. See Adding resources to RB9.

3. Send reports

1. Click **Send.**
2. To finalize and send the message, see Emailing & texting from RB9. (You can also add files to the email. See Composing emails & text messages.)
3. Click **OK.** (If you are using the mail composer, also click **Send** in the Email popup of each report after previewing/editing the email.) RB9 emails the reports.
4. Click **OK** again in the popup that appears when the reports have been sent. RB9 notes the success of its emailing for each report in the **Result** column and enters the date, time, and number of tasks in each report in its related resource's Notes Log and the Email Log.

NOTE: Additional report options

To view an individual resource's overdue tasks report, click the hyperlinked number under **Total Tasks.** RB9 generates the resource's report in chronological order, oldest task first. You can export or print the report (see Printing invoices, statements & reports), or click **Send** to email to the report to the resource**.**

Reference

- Notes Log
- Email Log
- Lookup panel
- Jobs lists
- Date Navigator
- Business Units
- Email preferences

Step-by-step instructions

- Looking up resources
- Looking up cases
- Searching in RB9
- Adding resources to RB9
- Emailing & texting from RB9
- Composing emails & text messages
- Printing invoices, statements & reports

Analyzing job assignments by resource

RB9 Standard only

See who has been assigned to jobs in a set space of time. Use filters to more closely inspect for example, what types of jobs and which cases resources are assigned to. Save and print reports.

1. Set parameters

1. **Calendar > Assignment Analysis**
2. Click in the **Search By** pane to see all assigned upcoming jobs in your calendar for the next 30 days, or use the Search By filters to restrict the results before clicking :

   - ### View Option

     Summary – Default. Displays as a static report the total amounts of assigned, canceled, and net jobs by resource.

     By Month – When viewing this interactive report with **Expand/Collapse > Expand Date,** assigned, canceled, and net jobs by resource will be further broken down by month, quarter, and year.

     Summary by Case – Displays as a static report the total amounts of assigned, canceled, and net jobs by resource, further broken down by case.

   - ### Sort By

     Number of Assignments – Default. Displays who has the most assignments first.

     Resource Name – Displays the list alphabetically.

   - ### Date Type

     Job Date – Default. Job's scheduled date.

     Order Date – Includes assignments for write-ups ordered for previously billed non-transcribed jobs.

   - ### *Date From/*Date To

     Required. Works with **Date Type.** Default is from tomorrow to 30 days in the future. Change date range, if desired (see Date Navigator).

   - ### Job Type

     Categories of jobs requested by clients. Default is ALL. Click to restrict search to specific job types (see Lookup panel). Job type options are set in Lists > Jobs.

Resource

Leave blank unless you are analyzing assignments for a particular resource. To see assignments for a single resource, see Looking up resources.

- ### Case

  Leave blank unless you are analyzing assignments for a particular case. To select a case, see Looking up cases.

- ### Business Units

  Profit centers or parts of your business you track separately. Default is ALL. Click ▣ to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. ## View assignments

   RB9 lists all of the jobs that meet the specified search condition(s) as a report with totals for all assigned jobs, canceled jobs, and net jobs.

   On summary reports, the search criteria used to generate the 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.

BEST PRACTICES: Distributing work fairly

To figure out how to distribute job assignments more evenly, run the Assignment Analysis report on a case that your resources are asking for to see who has been given jobs on that case and how many times they've been assigned to it over a specific period. You will be able to see at a glance how evenly the workload is distributed between your resources and be able to make any adjustments necessary in future assignments.

Reference

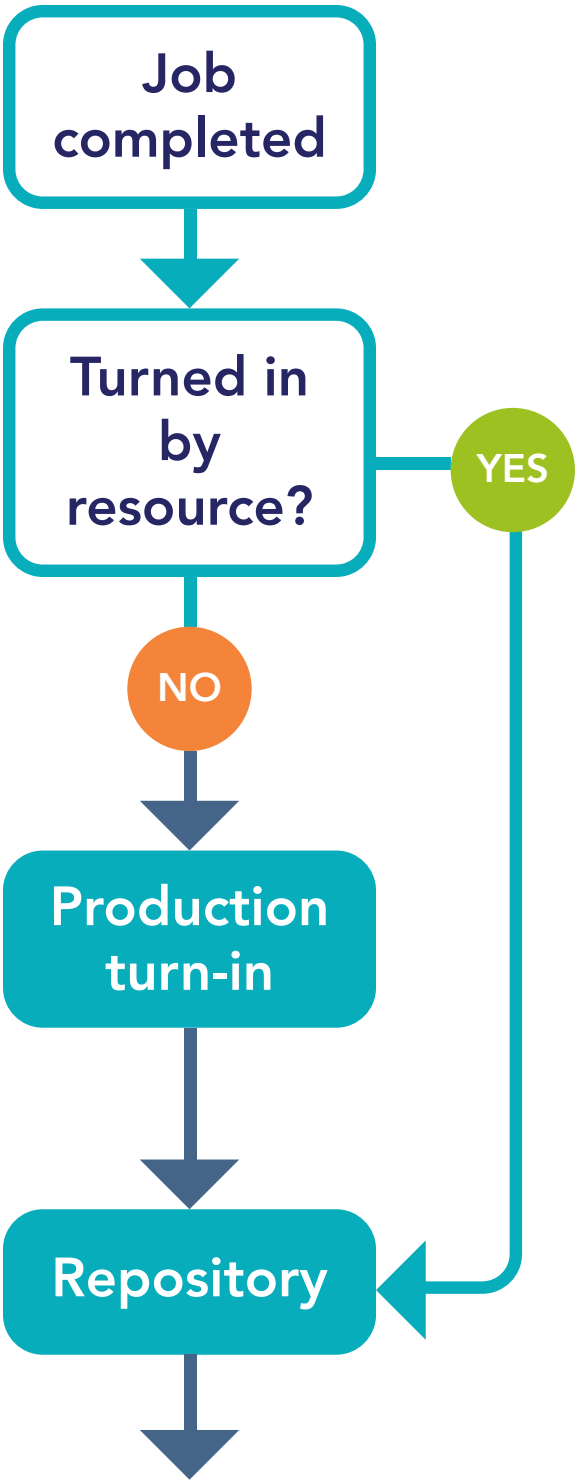
- Date Navigator
- Lookup panel
- Jobs lists
- Jobs
- Case
- Business Units
- Resources

Step-by-step instructions

- Assigning resources
- Looking up cases
- Looking up resources
- Using interactive reports
- Printing invoices, statements & reports
- Exporting & printing results

Production daily procedure

Production turn-in can be done by resources through RB Connect, or by your production department.



When resources turn in their jobs on RB Connect, the office is notified through Notifications and Messages.

If resources don't do their own turn-in, your production department enters witnesses, parties to bill, and services requested from the billing sheet.

Upload files (such as transcripts and exhibits) to RB9's Repository, then publish them for clients and resources.

Print labels for sending materials via surface mail. Or prepare FedEx/UPS shipping labels.

Use RB9's extensive variety of form letters to correspond with attorneys, witnesses and others.

After verifying turn-in information, select rate tables and enter miscellaneous charges. Calculate, post and print invoices.

NOTE: Turn In/Billing workflow

Creating an invoice involves two separate parts: Turn-in and Billing.

1. Turn-in is usually initiated by a resource, such as a reporter, through RB Connect, where they can enter details about the witness, ordering parties, and requested services into your RB9 database. Otherwise, your production department performs these tasks when they receive a billing sheet with an ASCII file from a resource.
2. After completing turn-in, the job is handed off to the billing department, which reviews and posts (finalizes) the invoices, then sends them to the clients.

Reference

- RB Connect
- Notifications and Messages
- ASCII

Step-by-step instructions

- Generating invoices
- Uploading files to a repository
- Printing labels
- Shipping to clients
- Sending letters
- Finalizing invoices

Searching Turn In

Find jobs to turn in by case, what stage they are in, or other filters.

TIP: Turn in jobs from job detail window

You do not have to search Turn In to begin job turn in if you are already in a View Job/Edit Job window. Click **More > Turn In** at the top of any job detail window to begin turning in that job.

Continued from Generating invoices.

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:

   - **Job No.**

     Enter the entire job number.

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

     To search for turned-in jobs by their scheduled job dates, enter date(s) in the field(s) or click each field's to select date(s) in Date Navigator.

   - **Job Status**

     Stage the job is in, e.g., New or Cancelled. Default is ALL. Click to restrict the results (see Lookup panel). Job status options are set in Lists > Jobs.

   - **Case**

     Click to look up and select a case (see Looking up cases).

   - **Resource**

     Click to look up and select a resource (see Lookup panel).

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. View results

1. Click . All jobs that fit the search criteria appear in the results pane. Listings are color coded based on their job status and include the date and time of the last time

their status was updated. (Job status colors are set in System Preferences > Calendar > Job Status Color.)

2. Click a hyperlinked job to view details or begin turn-in. See Generating invoices.

   TIP: Use shortcuts to save time

   Instead of clicking the job number, click its >

   - **View** – To open the job in its View Turn In window.
   - **Edit** – To open the job in its Edit Turn In window.

Reference

- Date Navigator
- Lookup panel
- Jobs lists
- Business Units
- Job Status Color preferences

Step-by-step instructions

- Searching cases
- Generating invoices

Generating invoices

In Turn-in, you begin the billing process by entering information about the witness(es), attending parties, firms to bill, and services ordered. If resources submit billing sheets through RB Connect, most of this information is entered into RB9 automatically.

1. Find job

To find the job you will turn in:

- Use the search criteria in **Production > Turn In.** See Searching Turn In.
- If you are in a View Job/Edit Job window, click **More > Turn In.** See Updating jobs.
- If resources turn in jobs through RB Connect, click the hyperlinked job number in the message you received through Notifications and Messages. See Communicating within RB9.

2. View details

1. In the View Turn In - Job# [selected job] window, click next to:
   - **Job No.**
     - **To view/edit job details.** See Updating jobs.
     - **To retrieve the billing sheet.** If the job was turned in via RB Connect scroll or jump down to the **Repository** pane in the **View Job/Edit Job** panel to download the billing sheet.

       NOTE: Scheduled by contacts included on billing sheets

       If your clients have paralegals scheduling jobs for attorneys, the scheduling contacts are included on the billing sheets turned in via RB Connect so you know who to copy the transcript and invoice to.
   - **Case**

     To view/edit the related case's details. See Updating cases. *(If there is no related case, this field is inactive.)*
2. The **Job Date, Production/Billing Notes,** and **Case Warning** appear at the top of the window for your reference and are uneditable.

3. Add witness(es)

The first step is to create the witness record(s) for the job. See Adding witnesses. If

you do not have resources turn in jobs through RB Connect, you can upload ASCII files here and generate RB-PDF Transcripts.

4. ## Add parties

   After saving a witness, and appear on the **Invoices** pane in the Edit Turn In - Job# window. To add parties and generate invoices, see Adding ordering parties. You cannot add parties to an invoice without adding witnesses first.

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

   After you add parties, you can turn off specific parties' access to specific files in the Witness-level repository of the job. For example, if Witness A has a PDF transcript, video, and exhibits in the repository, you can designate that Contact 1 can access only the PDF transcript and exhibits, while Contact 2 can access only the PDF transcript and video file. See Restricting contacts' file access.

5. ## Add services

   With invoices started for all parties to a job, add services requested and prepare invoices. You can pay resources for miscellaneous services you are not charging to the client, such as parking. 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

   Instead of the default RB9 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 a job, 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

- Witness record
- RB Connect
- Notifications and Messages

- RB-PDF Transcripts

Step-by-step instructions

- Searching Turn In
- Updating jobs
- Communicating within RB9
- Updating cases
- Adding witnesses
- 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

Adding witnesses

The first step in Turn In is to create the witness record(s) for the job. If resources turn in through RB Connect, most of this information will be entered automatically in RB9. If resources do not turn in files online, you can generate RB-PDF Transcripts from ASCII files you upload here.

Continued from Generating invoices.

1. Enter required information

1. In View Turn In-Job# window, click **Edit,** then click in **Witnesses** pane.
2. In the **New Witness** panel, a witness name appears in ***Witness** *(required)* if one was scheduled in RB9 for the job.
   - **If there is no name or if it is incorrect,** enter the correct name in the field.
   - **If there are multiple witness names in the field,** choose one to add to turn-in first, delete the rest. Then repeat "Add witnesses" step for each witness.
3. Click ***Resource** field's ▽ >
   1. **Lookup Task**
      If resources were assigned to the job's tasks in Calendar, the **Lookup Task** panel lists all assigned resources by task. (See Assigning and pre-assigning resources.)
      Click the hyperlinked task in the list to select the associated resource.
   2. **Lookup Resource**
      Select this option if:
      - **No resources were assigned to the job.** If RB9 alerts you when you select **Lookup Task** that no one was assigned, click **OK** in the popup, then use **Lookup Resource.**
      - **Someone other than the assigned resource did the task.**

      To search for a resource, see Looking up resources.

2. Enter other information

Other witness information is not required by RB9. It can be entered before or after saving the witness.

- **General**

  To enter information about the witness, deposition, and transcript, see Entering general witness information.

- **Additional**

  To track the transcript, see Entering additional witness information.

3. ## Save entry

   In the **New Witness** panel, click **Save >**

   - **Save & Edit**

     To enter more witness information related to the task completed. The window changes to Edit Witness, adds **Repository** and **Notes Log** panes, and scrolls to **Repository** pane.

     - **To upload witness-related files,** such as ASCII transcripts, exhibits, and reporter's bill, to the **Repository,** see Uploading files to a repository. Later, as related service items are produced, upload them here also.

       NOTE: Number exhibits automatically when uploading to the repository

       When uploading exhibits to the Witness repository in Turn In, you can have RB9 automatically number the exhibits sequentially. (See Adding stamps to exhibits.)

     - **To convert uploaded ASCII transcripts to RB-PDF Transcripts,** click **> Create PDF Transcript** next to the file name in the **Repository** pane to select the ASCII file you want to convert to PDF. See Creating PDF transcripts.

     - **To enter and manage notes** about the witness and related materials produced in the **Notes Log,** see Making entries in notes logs, Managing notes logs, and Canceling notes. Notes types for witness notes log are set in Lists > Witnesses.

   - **Save & Close**

     If you have no more information to add at this time.

   - **Save & New**

     If there are additional witnesses and/or resources for this job, repeat these steps for each one.

NEXT: Enter ordering parties

Enter information from resources about who attended the job and requested services. Alert contacts about uploaded files. See Adding ordering parties.

Reference

- Witness record
- RB Connect

- ASCII
- Witnesses lists
- Notes Logs

Step-by-step instructions

- Generating invoices
- Assigning and pre-assigning resources
- Looking up resources
- Entering general witness information
- Entering additional witness information
- Uploading files to a repository
- Adding stamps to exhibits
- Creating PDF transcripts
- Making entries in notes logs
- Managing notes logs
- Canceling notes
- Adding ordering parties

Entering general witness information

Enter details about the witness, deposition, and transcript during Turn In.

Continued from Generating invoices, Adding witnesses, or Updating witnesses.

In the **General** pane of the **New Witness/Edit Witness** panel:

- ***Witness**

  Required. If there is no name or it is incorrect, enter the correct name in the field.

- **Witness Email**

  This address is used in Letters to Witness to send transcripts to witnesses via email for them to proof and sign. See Sending letters to witnesses. *(RB9 Standard only)*

  You can also send email directly to the witness by clicking ✉. See Composing emails & text messages.

- **Pages**

  Total number of transcript pages to be billed. The number of pages produced and billed can be different; enter only the pages to be billed.

- **Deduct**

  If you do not pay resources for certain types of pages, such as index or appearance pages, enter the number of these pages to subtract before calculating the resource's pay.

- **Begin Page No./End Page No.**

  Default is 1 and the total number of pages. Changing beginning page number automatically changes end page number.

- **Volume/Last Exhibit Marked**

  If the deposition is part of an on-going case and the witness will be deposed more than once, you can keep track of the volume number and last exhibit number in these fields for future reference.

- ***Resource**

  Required. If there is no resource or it is incorrect, click ... **>**

  - **Lookup Resource:** To search for the job's resource. See Looking up resources.
  - **Lookup Task:** To find resources assigned to the job. The **Lookup Task** panel lists all resources assigned to the job by task. Click the hyperlinked task in the list to select the associated resource.

- **Actual Start Time/Actual End Time**

  Record the times from the resource by either entering the times or clicking to select them from the drop-downs.

- **Remarks**

  If the resource wrote any notes on the billing sheet, enter them here to keep a copy in RB9. Remarks are displayed in the Witness grid of the job in Turn In.

NEXT: Track original transcript location & status

Enter original transcript tracking information in the **Additional** pane. See Entering additional witness information.

Reference

- Letters to Witness

Step-by-step instructions

- Generating invoices
- Adding witnesses
- Updating witnesses
- Sending letters to witnesses
- Composing emails & text messages
- Looking up resources
- Entering additional witness information

Entering additional witness information

Enter original transcript tracking information.

Continued from:

- *Adding witnesses*
- *Updating witnesses*
- *Entering general witness information*
- *Tracking original transcripts*

1. In the **Additional** pane of the **New Witness/Edit Witness** panel, enter or update:

   - **Send Original To**

     Location of the original transcript. If the original stays in your office, leave blank.

     TIP: Send transcripts via email

     You do not need to leave RB9 to send transcripts to witness or attorneys. You can send transcripts via email through RB9, using the Letters function. See Sending letters. *(RB9 Standard only)*

   - **Sent Via**

     Delivery service or method used to send the original transcript from your office.

   - **Sent Date**

     Date you sent the original transcript.

   - **Received Date**

     Date original transcript was returned to your office.

   - **Return Due Date**

     Date you expect the original transcript to have been returned to your office.

2. If read and sign requirements apply to this witness, enter or update:

   - **Read & Sign**

     Slide to Yes.

   - **Read & Sign Date**

     Date the signed transcript was returned to your office.

   - **Read & Sign By Firm**

     Click ▽... **>**

- **Lookup Firm** – To select the contact's firm (see Looking up firms).
- **Lookup Job Parties** – To select a party to the job. In the **Lookup Job Parties** panel, click the radio button of the contact who should review and sign the transcript. Then click **Select.**

- ### Read & Sign By Contact

  If you selected the read & sign firm by:

  - **Lookup Firms,** select the contact in the drop-down. If the contact does not appear in the drop-down, click ⊞ to add the contact. See Adding contacts to RB9.
  - **Lookup Job Parties,** the contact is automatically filled in.

- ### Affidavit To Firm

  Click ⊡ to select the contact's firm.

- ### Affidavit To Contact

  With the **Affidavit To Firm** entered, select the contact in the drop-down. If the contact does not appear in the drop-down, click ⊞ to add the contact. See Adding contacts to RB9.

- ### Errata Sheet To Firm

  Click ⊡ to select the contact's firm.

- ### Errata Sheet To Contact

  With the **Errata Sheet To Firm** entered, select the contact in the drop-down. If the contact does not appear in the drop-down, click ⊞ to add the contact.

Reference

- Date Navigator

Step-by-step instructions

- Generating invoices
- Adding witnesses
- Updating witnesses
- Entering general witness information
- Tracking original transcripts
- Adding ordering parties
- Sending letters
- Looking up firms
- Adding contacts to RB9

Updating witnesses

You can enter/edit information about a witness at any time after creating their witness record(s) for a job.

Continued from Generating invoices, Searching witnesses, or Creating PDF transcripts.

1. Select witness

1. In View Turn In-Job#, Edit Turn In-Job#, Witness Inquiry, or PDF Transcripts window, click the hyperlinked **Witness** name.
2. If the **Edit Witness** panel does not open automatically, click **Edit** in the **View Witness** panel/window.

2. Enter/edit information

In the **Edit Witness** panel, ***Witness** and ***Resource** are required, but can be edited:

- **To change the resource**
  Click ***Resource** field's ▽ **> Lookup Resource.** See Looking up resources.
- **To view/edit the resource**
  Click ***Resource** field's ▽ **> View Resource.** See Updating resources.
- **To enter general information**
  About the witness, deposition, and transcript in the **General** pane, see Entering general witness information.
- **To track the transcript**
  In the **Additional** pane, see Entering additional witness information.
- **To add files**
  In the **Repository** pane, see Uploading files to a repository.
- **To 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.
- **To download files**
  In the **Repository** pane, check the box(es) of the file(s) you want to you want to download, then click .

- **To alert contacts to uploaded files**

  In the **Repository** pane, check the box(es) of published file(s) you want to notify clients about, then click . 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 alert, then click **Next.** In the **Email** panel, you can edit the defaults and attach files/delete attachments. See Composing emails & text messages.

- **To enter notes**

  In the **Notes Log** pane, see Making entries in notes logs.

- **To view notes in different ways**

  In the **Notes Log** pane, see Managing notes.

- **To cancel notes**

  In the **Notes Log** pane, see Canceling notes.

3. **Save update**

   In the **Edit Witness** panel, click **Save >**

   - **Save & Edit:** To save your changes and continue to update the witness.
   - **Save & Close:** To save your changes and close the Edit Witness panel/screen.

Reference

- Witness record

Step-by-step instructions

- Searching witnesses
- Creating PDF transcripts
- Looking up resources
- Updating resources
- Entering general witness information
- Entering additional witness information
- Uploading files to a repository
- Composing emails & text messages
- Making entries in notes logs
- Managing notes logs
- Canceling notes

Witness Record

A **Witness Record** can represent a deponent, a proceeding, a conference or a video/audio tape. Each witness record is associated with a task and the resource who performed the task. You can enter an unlimited number of witness records for one job.

Reference

- Jobs
- Task
- Resource

Step-by-step instructions

- Generating invoices
- Adding witnesses
- Updating witnesses

Adding ordering parties

After entering witness information, the next step in Turn In is to add parties that ordered services. RB9 will automatically generate invoices for each party. If resources turn in through RB Connect, most of this information will be entered automatically in RB9.

Continued from Adding witnesses. (You cannot add parties to an invoice without adding witnesses 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 attending 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 transcript. Click **> Set Original.** In the **Set Original** panel, check the box(es) of the original ordering client(s). Then click **Save.**

NEXT: Restrict individual file access, alert contacts, & customize orders

In the **Invoices** pane, each invoice created is listed with its witness(es) and any prefilled services. To:

- Turn off individual contacts' access to specific Witness-level repository files, see Restricting contacts' file access.
- Alert contacts that their files are available for download, see Alerting clients.
- Update the service lists, see Adding & updating services.
- 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
- RB Connect

- Prefill

Step-by-step instructions

- Generating invoices
- Adding witnesses
- Prefilling parties & services
- Adding ordering parties manually
- Restricting contacts’ file access
- Alerting clients
- Adding & updating services

Prefilling parties & services

Instead of entering parties and services manually, use RB9's prefill options to have RB9 create invoices that automatically include parties and their standing orders or previously ordered services. At the same time, you can tell RB9 which tasks have been completed to have it update the Tasks in Progress list automatically.

Continued from Adding ordering parties.

1. Find parties to prefill

1. In the **Invoices** pane of the Edit Turn In – Job# window, click **> Prefill Orders & Services.**
2. In the **Prefill Orders & Services** panel, defaults include:
   - **Consolidate Invoices**

     RB9 will include all of a firm's orders on this job 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**

     RB9 will include the service items from the selected parties' requested services for the job/case (see Selecting preferred or requested services) in the next step when creating orders. If you want to create blank invoices and add service items later, slide to No.
3. Parties related to the job appear in panes. Check boxes of parties you want to invoice:
   - **From Case**

     Parties that were entered at the case level and flagged to appear in Turn In prefills are listed.
   - **From Job**

     Parties that were entered in the job are listed under the witness(es) turned in.
   - **From recent 50 Turn-Ins**

     Parties that ordered services from the most recent jobs tied to the case.

TIP: Check recent orders first

If the job is part of a case that was set up during pre-trial discovery, parties were probably added to get access through RB Connect to the related calendar and repository files and might not have any preferred services. However, it's highly likely

that parties to a case that have ordered services on previous jobs in the case will order the same services for similar jobs on the same case, so check **From recent 50 Turn-Ins** to see if parties appear there.

NOTE: Missing parties?

Parties to a case or job do not appear in these lists unless the **Show in Turn-in > Prefill** box is checked in the party's **General** pane. See Entering general party information. (You can also add parties manually later. See NEXT: Add other parties/edit invoices below.)

4. Click **Create Invoice(s).** RB9 assembles invoices for each of the selected parties listing the witnesses and the party's preferred services and opens the **Set Turn In/Completed Date** panel.

TIP: Color-coded invoices

You can easily locate invoices in the Edit Turn In – Job# window because the background of invoice listings is yellow, while listings for witnesses 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.

2. Check off completed tasks

When you create an invoice, RB9 gives you the option to check off job-related assignments as completed. This keeps your resource work load reports (Tasks in Progress) accurate.

1. In the **Set Turn In/Completed Date** panel, check the box(es) of the task(s) being invoiced to the prefilled parties.
2. Click **Set Turn In/Completed Date.**
3. In the popup that appears, click **OK.**

NOTE: Keep task status up to date

If you don't check all the boxes of completed tasks here, you can note completed tasks in Tasks in Progress later.

NEXT: Add other parties/edit invoices

Additional parties: If there were ordering parties at the job who did not appear in a Prefill list, add them manually. See Adding ordering parties manually.

Incorrect invoices: If any of the invoices created is incomplete or incorrect, you can update it by removing services not ordered on this job, adding other service items, and re-arranging the order of how they will appear on the invoice. See Adding & updating services.

Reference

- Parties

- Prefill
- Tasks in Progress
- Consoldated Invoices and Statements
- RB Connect

Step-by-step instructions

- Generating invoices
- Adding ordering parties
- Selecting preferred or requested services
- Entering general party information
- Adding ordering parties manually
- Adding & updating services

Prefill

When you **prefill** a job, case, or invoice, RB9 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, case parties, job parties, and recent related jobs.

- Parties and their requested services can be entered in a case starting in the pre-trial discovery phase.
- They can be added to a job.
- 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.
- RB9 also tracks parties and services for jobs on the same case and offers the options selected for the most recent related jobs.

Reference

- Jobs
- Task
- Resource

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 a job 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 a job.

Step-by-step instructions

- Adding ordering parties manually
- Adding 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 job, 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

- Job

Step-by-step instructions

- Prefilling parties & services
- Entering additional firm information
- Sending monthly statements

Adding ordering parties manually

If attending parties ordered services but were not included when you prefilled parties, add them one at a time.

Continued from Adding ordering parties.

1. Add a party

1. Click in the **Invoices** pane header of the Edit Turn In – Job# 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** drop-down *(required)*. If the contact is not listed, click and enter the contact's information in the **New Contact** panel. See Adding contacts to RB9.
2. In the ***Select witness(es) this party is ordering pane** *(required)*, all witnesses are selected by default. Uncheck the box of any witness this party is not ordering.
3. In the **New Invoice** panel, click **Save.** Or add billing information, files and notes before saving. See Adding billing information to invoices.

NEXT: Customize orders

In the **Invoices** pane, each invoice created is listed with its witness(es) and any prefilled services. To update the service lists, see Adding & updating services.

Reference

- Parties
- Sold To vs. Bill To
- Prefill

Step-by-step instructions

- Generating invoices
- Adding witnesses
- Prefilling parties & services
- Adding billing information to invoices
- Adding & updating services

Restricting contacts' file access

Access Types "ALL" and "Contacts and Office" give file access through RB Connect to all contacts associated with a job/case, their seniors, and Sold To contacts for a witness. If you don't want to give an included contact access to a specific file in the Witness-level repository in Turn In, you can remove their access. For example, if Witness A has a PDF transcript, video, and exhibits in the repository, you can designate that Contact 1 can access only the PDF transcript and exhibits, while Contact 2 can access only the PDF transcript and video file.

Continued from Adding ordering parties. (You cannot restrict access to Witness-level repository files without generating invoices for parties first.)

1. Find file in Witness repository

1. After generating invoices for parties ordering transcripts or other services, if you want to restrict which parties have access to a specific file associated with the witness for the job being billed, click the hyperlinked witness name in the **Witnesses** pane of the Edit Turn In - Job# window.
2. In the **View Witness** panel, click **Edit.**
3. Scroll or jump to the **Repository** pane. All files uploaded to the selected witness are listed.
4. 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 witness and contacts granted access to from the sold to contact are listed, and by default their **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 RB 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.**

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 Witness-level repositories only

While you can view which contacts have access to a file in repositories in View Case/Edit Case and View Job/Edit Job windows, you cannot restrict access for individual contacts to these files.

Reference

- RB Connect
- Seniors
- Sold To vs. Bill To

Step-by-step instructions

- Generating invoices
- Adding ordering parties

Adding & updating services

After adding parties, add services they requested. RB9 will automatically generate invoices for each party. If resources turn in through RB Connect, most of this information will be entered automatically in RB9.

When you prefill parties with standing orders or previously ordered services, RB9 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 on this job, and re-arrange the order of how they will appear on the invoice.

You can pay resources for miscellaneous services you are not charging to the client — such as parking — now (or later in Override Resource Pay).

Continued from Adding ordering parties.

1. ## Manage services

   In the **Invoices** pane of an Edit Turn In - Job# window, all invoices created so far are listed with their related witness record(s) and any service items set to be billed. To:

   - ### Add services

     - **From billing sets/party's standing orders/case/job**

       To include service requests from a billing set, the party's Firm and/or Contact listing, the case, and/or job, use **Prefill Services.** See Adding multiple services at once.

     - **Individually**

       To add a single service to an invoice, click next to a hyperlinked **Witness** in the invoices and select **New Service.** See Adding & updating individual service items.

   - ### Edit included services

     - **Remove multiple services at once**

       When prefilling parties, all of the related services get added to their invoice(s), but you can easily remove any that were not ordered for this job.

       1. To remove multiple services, click next to a hyperlinked **Witness** in the invoices and select **Delete Services.**

       2. 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.

1. If any of the services on an invoice was not ordered by the **Sold To Contact** for this job, click its hyperlink.
2. In the **View Service** panel, click **Delete.** Then click **Yes** in the popup that appears.

- **Update services**

1. If a service item needs revising, click its hyperlink.
2. In the **View Service** panel, click **Edit.** To revise the service item in the **Edit Service** panel, see Adding & updating individual service items.

- **Copy party's services to another party**

  Save time if multiple parties to a job 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 services will appear on an invoice, click or next to a service to move it up or down in the list.

2. Add additional pay

To include pay for resources for miscellaneous services you are not charging to the client, such as parking.

1. Click the hyperlinked witness name in the invoice.
2. In The **Edit Order** panel, scroll or jump to the **Additional Pay** pane.
3. Click . See Adding additional pay amounts.
4. Click **Save >**
   - **Save & New:** To save the amount and add more additional pay amounts for the same resource.
   - **Save & Close:** When you have no more additional pay to add to the resource.
5. New additional pay appears as line items in the related invoice. (You can also add additional pay in Override Resource Pay.)

NEXT: Enter billing information

When you have orders for all attending parties, edit the invoice(s) created to include billing information, repository files, and notes. See Adding billing information to invoices.

Reference

- Parties
- RB Connect
- Billing Sets
- Override Resource Pay
- Prefill

Step-by-step instructions

- Generating invoices
- Adding ordering parties
- Prefilling parties & services
- Adding multiple services at once
- Copying services to another party
- Adding additional pay amounts
- 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.

Continued from Adding & updating services.

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 created in Setup. See Service Item Subgroups and Service Item Master.)

2. Service Subgroup

Select the relevant service subset in the drop-down.

3. Service Item

Select the specific service ordered in the drop-down.

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.
- **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).
- **Pages**
  This field only appears for service items that have the **Use Pages for calculation** option turned on in Service Item Master. See Entering billing & pay rates.
- **Delivery Method**
  Select how service item should be sent to client in the drop-down. Methods and the

default are defined in Lists > Production.

- **Turnaround Type**
  Select how how fast the client wants the service in the drop-down. Times and the default are defined in Lists > Contacts.

- **Due in days**
  If left blank, RB9 automatically calculates this field by adding **Due in days** default preferences to the **Job Date. Due in days** defaults come from the firm's preferences first (see Adding standing requests), then if that is blank, from the business unit's preferences (see Entering default task deadlines). Enter a number to override the defaults.

- **Produced**
  Click to select 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 under Witness in the **Invoice** pane, so you can quickly see which items still need to be completed for this job. This is also a filter on Production Sheets so your production staff can have a list of only the items that they need to produce.

- **Remarks**
  Enter details and comments about this service item.

NOTE: Overriding defaults

Slide **Override** to Yes if you want to enter billing & pay rate information and options here. See Entering billing & pay rates. However, it usually better to apply rates from your existing tables first, then edit them for individual invoices if needed. Rates are applied by billing staff after invoices have been generated.

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.**

RB9 adds/updates the service(s) with default rates (set in Service Item Master) to the witness selected.

Reference

- Service Item Subgroups
- Service Item Master
- Production lists
- Contacts lists

Step-by-step instructions

- Generating invoices
- Adding & updating services
- Entering billing & pay rates
- Adding standing requests
- Entering default task deadlines
- Adding multiple services at once
- Copying services to another party

Adding multiple services at once

Save time adding services by using a billing set to add a group of services at once.

Continued from Adding & updating services.

1. In the **Invoices** pane of an Edit Turn In - Job# window, click next to a hyperlinked **Witness** and select **Prefill Services.**
2. In the **Prefill Services** panel, check boxes of services you want to include:
   - **From Billing Set**

     The list displays the services in the default billing set. Select a different billing set in the drop-down 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 Case's Preferred Services**

     If the party to the case requested services for all jobs on a case. (See Selecting preferred or requested services.)
   - **From Job's Preferred Services**

     If the party to the job requested services when scheduling the job. (See Selecting preferred or requested services.)
3. All services in the F**rom Billing Set** pane are checked by default. Uncheck the **Service Subgroup** box in the header to deselect all services. Check/uncheck boxes in any of the panes to include the services ordered.
4. Enter/update the number of **Units** for each selected service, if needed.
5. Click **Save.** RB9 adds the service(s) with default rates (set in Service Item Master) to the witness selected.

Reference

- Parties
- Billing Sets
- Service Item Master

Step-by-step instructions

- Generating invoices
- Adding & updating services
- Adding & updating individual service items
- Selecting preferred or requested services

Copying services to another party

Save time if multiple parties to a job are ordering the same services by setting up one invoice with the services to be billed, then copying the service items to other parties.

Continued from Adding & updating services.

1. In the **Invoices** pane of an Edit Turn In - Job# window, locate the witness record you want to copy services from.
2. Click next to the hyperlinked **Witness** name and select **Copy Services To.**
3. In the **Copy Services To** panel:
   - Selected witness record appears in the **Copy From** pane with its invoice identifiers.
   - The rest of the witness records and their invoice identifiers are listed in the ***Copy To** pane. You must check at least one box in the list. Or click the box in the header to select all.
4. Click **Copy.**
5. All of the service items copy over to the selected witness record(s). To update each witness record's services, see Adding & updating services.

Reference

- Parties

Step-by-step instructions

- Generating invoices
- Adding & updating services
- Adding & updating individual service items
- Adding standing requests
- Selecting preferred or requested services

Adding billing information to invoices

After adding services to invoices, populate them with billing information, choose invoice messages, upload repository files, and enter notes.

Continued from Adding & updating services.

1. Select invoice

1. In the **Invoices** pane of an Edit Turn In - Job# window, click the hyperlinked **Invoice No.** you want to edit.
2. In the **View Invoice** panel, click **Edit.**

2. Update billing information

In the Edit Invoice **General** pane, not all fields are editable. Fields you can edit:

- **Invoice Date**

  Enter a new date or click to select date in the Date Navigator.

- **Original**

  Slide to Yes if this is your O&1 client.

- **COD**

  Slide to Yes if the invoice is due upon delivery.

  NOTE: Invoices for COD clients are COD by default

  If the Bill To firm has been designated COD in the **Additional** pane of its listing (see Entering additional firm information), this box will be checked by default.

- **Print details on invoice**

  Slide to Yes to have services listed on the invoice.

- ***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. Click **>**

  View Contact: To view/edit contact details. See Updating contacts.

  New Contact: To change contacts. See Adding contacts.

- **Bill To same as Sold To**

  - **If invoices are to be sent to this firm:** 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, slide to No and select a different contact from the drop-down.

  - **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. See Looking up firms.

- **Bill To Firm**

  If a third party is paying for this invoice, click 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 isnt listed, click to create a new contact (see Adding contacts).

  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.

- **Invoice Message**

  Unlimited character count. Your default 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 window. To customize the appearance of the message, see Customizing notes & remarks.

  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, use Set Invoice Messages to update all or some of the related invoices' messages in a batch. See Selecting invoice messages.

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 invoices.

4. ## Upload files

   If the resource gave you any files, such as exhibits and orders, scroll or jump to the **Repository** pane, and upload the files. See Uploading files to a repository.

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. RB9 automatically generates a standard invoice header for each witness 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 select one of your custom invoice messages, if the default isn't appropriate. 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
- Invoice lists
- Electronic billing
- Notes Logs

Step-by-step instructions

- Generating invoices
- Adding & updating services
- Entering additional firm information
- Updating firms
- Looking up firms
- Updating contacts
- Adding contacts
- Calculating & posting invoices
- Customizing notes & remarks
- Setting up invoice messages
- Selecting invoice messages
- Entering electronic billing information
- Uploading files to a repository
- Making entries in notes logs
- 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:

- **Ref. No. for Bill To Contact**

  If the contact provided a reference number for the job/invoice include it here so it relates to what they have in their own system.

- **Ref. No. for Resource**

  If this resource is an affiliate that provided a reference number, e.g., the number on the invoice they gave you for services rendered.

- **Invoice Type**

  Select an invoice type (e.g., Interoffice Invoice or Affiliate Invoice) in the drop-down. Invoice Types are set in Lists > Invoice.

- **Remarks**

  Any notes about this invoice.

2. Update e-billing information

If you will be billing the party electronically, this information should have been entered at the case level so that it appears automatically in invoices related to the case. You can enter or update it here for this invoice only. See Entering electronic billing information.

Reference

- Invoice lists
- Electronic billing

Step-by-step instructions

- Generating invoices
- Adding & updating services
- Adding billing information to invoices
- Viewing & sending single invoices
- Entering electronic billing information

Selecting invoice headers

After entering billing information, add custom invoice headers and messages, if desired.

RB9 automatically generates a standard invoice header for each witness based upon your input (e.g., "ORIGINAL AND 1 COPY OF THE TRANSCRIPT OF:"). If the default header is not appropriate or descriptive enough for a particular invoice or invoices, enter or select one of your custom invoice headers.

Continued from Generating invoices or Adding billing information to invoices.

1. In the **Invoices** pane of a Edit Turn In – Job# window, click **> Set Invoice Headers.**
2. In the **Set Invoice Headers** panel's ***Invoice Header** field, you must either:
   - Enter a custom header. This header will not be saved in your Invoice Headers list. To save a header, see Setting up invoice headers.
   - Click ▾ to select a header from your previously set headers.
3. In the ***Apply To** pane, 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 a job are filled with services and customized, apply billing, rush, and pay rates individually or in batches. See Applying rates.

Reference

- Parties
- RB Connect

Step-by-step instructions

- Adding billing information to invoices
- Selecting invoice messages
- Setting up invoice headers
- Applying rates

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 their 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 look of the message if desired. See Customizing notes & remarks.

    NOTE: Messages created here are one-off

    Messages entered from scratch in the Invoice Message field will not be saved in your Invoice Message list. Nor does RB9 save your edits made here to existing messages. To save a new or updated message, see Setting up invoice messages.
3. In the ***Apply To** pane, default message(s) that apply to this job's invoice(s) are listed. 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 & pay rates

When invoices for all parties to a job are filled with services and customized, apply billing, rush, and pay rates individually or in batches. See Applying rates.

Reference

- Lookup panel
- Invoice Messages setup

Step-by-step instructions

- Customizing notes & remarks
- Setting up invoice messages
- Applying rates

Finalizing invoices

After generating invoices, the second part of Turn In involves applying billing, rush, and pay 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

   Before RB9 can calculate the amounts to charge on an invoice, you must first apply billing rates, pay rates, and (optionally) rush types to the invoice. See Applying rates.

   ### NOTE: Finalize invoices in Turn In or Billing

   After applying rates to invoices, the next steps in finalizing invoices can occur within individual jobs in Turn In or in Billing > Post Invoices, usually at the end of the day.

2. ## Calculate invoice totals

   Direct RB9 to total service charges and resource pay on invoices. See Calculating invoices.

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 RB9 ledger. See Posting invoices in Turn In.

NEXT: Send invoices to clients

After posting, RB9 will automatically prompt you to send copies to ordering clients. See Sending & archiving invoices.

Reference

- Billing rates
- Pay rates
- Rush types
- Billing > Post Invoices

Step-by-step instructions

- Generating invoices
- Applying rates
- Calculating invoices
- Previewing invoices
- Posting invoices in Turn In
- Sending & archiving invoices

Applying rates

After entering billing information and producing the requested service items, the production part of Turn In is finished. The next part of Turn In is to finalize the invoices. Before RB9 can calculate the amounts to charge on an invoice, you must first apply billing rates, pay rates, and rush types to the invoice. If you have a separate billing department, they will handle this task and finish the invoice(s).

Continued from Finalizing invoices.

1. Apply billing rates

1. In the **Invoices** pane of the Edit Turn In – Job# window, click **> Set Billing Rates.**
2. In the **Set Billing Rates** panel, click ***Billing Rate** *(required)*.
3. In the **Lookup Billing Rate** panel, your active billing rates appear. You can click a hyperlinked **Billing Rate Name** to select that rate, or search for the billing rate (see Lookup panel).
4. In the **Set Billing Rates** panel's ***Apply To** pane, check:
   - The box(es) of the invoice(s) you want to apply the 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 have billing rates applied.

2. Apply pay rates

1. In the **Invoices** pane of the Edit Turn In – Job# window, click **> Set Pay Rates.**
2. In the **Set Pay Rates** panel, click ***Pay Rate** *(required)*.
3. In the **Lookup Pay Rate** panel, your active pay rates appear. You can click a

hyperlinked **Pay Rate Name** to select that rate, or search for the pay rate (see Lookup panel).

4. In the **Set Pay Rates** panel's ***Apply To** pane, check:
   - The box(es) of the invoice(s) you want to apply the pay 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 pay rates without closing the panel.
   - **Save & Close –** To close the panel when you have finished applying pay rates.
6. Repeat until all invoices have pay rates applied.

3. Apply rush type

If any orders require expedited turn-around, add related rush surcharges.

1. In the **Invoices** pane of the Edit Turn In – Job# window, click **> Set Rush Types.**
2. In the **Set Rush Types** panel, select a ***Rush Type** in the drop-down.
3. In the ***Apply To** pane, check:
   - The box(es) of the invoice(s) you want to apply the rush type 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.
4. Click **Save >**
   - **Save & New –** To continue applying rush types without closing the panel.
   - **Save & Close –** To close the panel when you have finished applying rush types.
5. Repeat for any additional invoices that include expedited services.

TIP: Use blank rush type to remove applied rush types

If you applied a rush type to an invoice incorrectly, repeat this step but leave ***Rush**

Type blank and apply it to the invoice that shouldn't have a rush type. When you save the rush type this time, the **Rush Type Name** field for the invoice will be blank.

4. ## Review charges applied

   Before calculating invoices, check that each service item has the proper rates applied.

   1. If any rates need adjusting, click the hyperlinked service item.
   2. In the **View Service Item** panel, click **Edit.**
   3. In the **Edit Service Item** panel, check the **Override** box.
   4. Update rates and options as needed. See Entering billing & pay rates.

NEXT: Calculate & post invoices

After applying rates to invoices, calculate invoice totals. You can then preview the invoices, post them to your RB9 ledger, and send copies to ordering clients. See Calculating invoices.

Reference

- Billing rates
- Pay rates
- Rush types
- Lookup panel

Step-by-step instructions

- Finalizing invoices
- Adding billing information to invoices
- Entering billing & pay rates
- Calculating invoices

Calculating invoices

After applying rates to invoices, calculate invoice totals. You can then review the invoices for errors, post them to your RB9 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 job or in the Billing module later, individually or in batches to save time.

- **Within Turn In:**

  Continued from Applying rates or Finalizing invoices.

  1. To calculate charges on invoices, click **Calculate Invoices** in the Edit Turn In – Job # header.
  2. In the **Calculate Invoices** panel, all invoices are listed and selected. If you don't want to calculate an invoice now, uncheck its box.
  3. Click **Calculate.**
  4. RB9 calculates each invoice. When it finishes successfully, a popup appears. Click **OK.**

- **In Billing > Post Invoices results:**

  Continued from Searching unposted invoices.

  In Post Invoices search results, any invoice that needs to have its charges calculated and totaled appear in the results grid with a checkmark in the **Need Calculation** column.

  Click the invoice's **> Calculate Invoice.** RB9 calculates the invoice amounts.

NEXT: Preview, then post invoices

After calculating invoice total amounts, review invoices for errors, then post them to your RB9 ledger from within Turn In or in Billing > Post Invoices.

Reference

- Post Invoices
- Send Invoices
- Billing module

Step-by-step instructions

- Finalizing invoices
- Applying rates
- Entering additional firm information
- Previewing invoices
- Posting invoices
- Sending & archiving invoices

Previewing invoices

After calculating invoice totals, review what will be on the invoice before posting 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 job or in the Billing module later, individually or in batches to save time.

Continued from:

- *Calculating invoices*
- *Finalizing invoices*
- *Searching unposted invoices*
- *Sending & archiving invoices in batches*

1. Click an **Invoice No.** **> Preview Invoice** in:

   - **Turn In**

     The **Invoices** pane of the Edit Turn In – Job# 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 window of an invoice selected in the results pane of the COD Invoices window.

   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, RB9 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 view/hide line item charges,** click **Turn detail on** or **Turn detail off.**
   - **To export the invoice** to save it and/or edit it in another application, or print it. See Printing invoices, statements & reports.

3. When finished, click **Close.**

Next: Post and send invoices

After previewing invoices, post them to your RB9 ledger (i.e., record the billed items) and send copies to ordering clients. See Posting invoices and Posting invoices in Turn In.

Reference

- Post Invoices
- Send Invoices
- COD Invoices
- Invoice Inquiry

Step-by-step instructions

- Calculating invoices
- Finalizing invoices
- Searching unposted invoices
- Sending & archiving invoices in batches
- Entering additional firm information
- Printing invoices, statements & reports
- Posting invoices
- Sending & archiving invoices

Posting invoices in Turn In

After previewing invoices, post them to your RB9 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 – Job # header.

   ### NOTE: COD invoices cannot be posted

   If after calculating an invoice, the Post Invoices button is grayed out, the invoice is a COD invoice. Because COD invoices in RB9 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 job 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 archive the invoices at the same time.

4. After posting successfully, posted invoices' text changes to green and an 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 in the results pane. See Sending & archiving invoices.
   - **No** – If you have a lot of jobs 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 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

- Finalizing invoices
- Applying rates
- Entering additional firm information
- Previewing invoices
- Working with COD invoices
- Posting invoices
- Sending & archiving invoices

Monitoring production

RB9 Standard only

After customizing the Tracking module to fit into your workflow, you can track transcripts, exhibits, video, so you always know their current status.

View current tracking status

1. **Production > Tracking**
2. In the Tracking window's **Search By** pane, **Status** defaults to "In Progress." To see all current To-Do items, click .

Customize tracking results

1. You can set up the results grid layout to show only what you want and in the order you would like. Then save your custom grid layout so the next time you use the Tracking function it is already set up as you want. See Customizing grids.
2. If you want to refine the list, set different search parameters in the Tracking window's **Search By** pane before clicking :

   - **Status**

     Click to select other tracking status. See Lookup panel.

   - **Job No.**

     Enter a job number to see only tracking items connected to a single job.

   - **Tracking Description**

     Enter part of a tracking item's label.

   - **Date Type**

     Job Date – Default. Date the job, e.g., deposition, occurred.

     Item Due Date – Set in each item's Edit Tracking window. See Updating tracking.

     Step Due Date – Set in Setup > Tracking Steps.

   - **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.

   - **Assign To**

     To search for tracking items that were assigned to a resource, see Looking up resources.

- **Case**

  To search for tracking items that are related to a case, see Looking up cases.

- **Firm**

  To search for tracking items that were ordered by a firm, see Looking up firms.

- **Contact**

  To search for tracking items that were ordered by a contact, see Looking up contacts.

- **Manager**

  To search for tracking items that are assigned to an RB9 user, see Lookup panel.

- **Tracking Item**

  Default is ALL. Click ▾ to choose other tracking item categories. 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 jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

- **View details/create new**

  To:

  - **View or update a tracked service item,** see Updating tracking.
  - **Initiate a new tracking session,** see Starting new tracking.

Reference

- Tracking setup workflow
- Lookup panel
- Tracking lists
- Tracking Steps
- Date Navigator
- Business Units

Step-by-step instructions

- Customizing lists
- Defining tracking steps
- Customizing grids
- Updating tracking
- Looking up resources
- Looking up cases
- Looking up firms
- Looking up contacts
- Updating tracking
- Starting new tracking

Starting new tracking

RB9 Standard only

Tracking can be initiated as soon as a job is created (scheduled). Or use the Production Sheet as a guide for which service item's to track through production.

1. Initiate tracking item

1. **Production > Tracking**
2. In the Tracking window, click **New.**
3. In the New Tracking window, enter the job number for the service item you want to start tracking, then click .
4. RB9 populates some of the fields in the **General** pane with job information. Some information is not editable. View and update details of any field with an active by clicking it. See Updating jobs and Updating cases.

2. Enter required info & save

1. Enter a descriptive title for the tracking item in ***Tracking Description** *(required)*.
2. Click **Save >**
   - **Save & Edit:** To continue entering and updating information. The window changes to Edit Tracking with additional fields and panes, adds the tracking start date, default step and status. See Updating tracking.
   - **Save & Close:** To save the tracking item and close the window.

Reference

- Production Sheet

Step-by-step instructions

- Generating production sheets
- Updating jobs
- Updating cases
- Updating tracking
- Monitoring production

Updating tracking

RB9 Standard only

Keep the status of items being tracked current by updating tracking information as the items move through production and into storage.

Continued from Monitoring production.

1. View tracking item details

1. To view or update a tracked service item, click its hyperlink in the Tracking window results grid or click its >
   - **View** – To open the service item in its View window.
   - **Edit** – To open the service item in its Edit window.
2. RB9 displays the selected service item's status and other details in the View/Edit Tracking window. To update the item from the View Tracking window, click **Edit**.
3. In the Edit Tracking window's **General** pane, some information in not editable. You can view and update details of any field with an active by clicking it. See Updating jobs and Updating cases.

2. Update information

In the Edit Tracking window's **General** pane, enter/update text or select other information:

- ***Tracking Description**

  Required. Title for the tracking item

- **Item**

  Type of tracking item. Tracking item categories and default are set in Lists > Tracking.

- **Due Date**

  Deadline date for the item. Can search Tracking by Item Due Date.

- **Cancelled Date**

  If service item request is canceled, enter the date

- **Assign To**

  If the step was assigned to a resource, you can click to view/update the resource.

- **Units Expected**

  Number of units ordered

- **Units Delivered**

  Number of units produced so far

- **Priority**

  Item's urgency or order of importance

- **Manager**

  RB9 user responsible for overseeing the tracking item

- **Witness**

  If witnesses have been entered for this job in Turn In, they appear in the drop-down.

- **Contact**

  If the (ordering) parties have been entered for this job in Case, Job or Turn In, they appear in the drop-down.

- **Firm**

  If you selected a **Contact,** the contact's firm automatically fills in.

- **Remarks**

  Any special notes that staff needs to see when producing/completing the tracking item

3. ## Document media

   In the **Media** pane, enter/update text and selections if the item being tracked is a recording of some sort, usually video:

   - **Archival Status**

     Current archival status of original media, such as DVD. Archival Status options are set in Lists > Tracking.

   - **Classification**

     Access level for the media. Classification options are set in Lists > Tracking.

   - **Archival Notes**

     Any remarks or other information about the item or its handling

   - **Storage**

     Description of location of media

- **Media Set**

  If a deposition was recorded, use **Media Set** panel to document the source tapes and their archival status. See Entering video information.

4. Move item to next step

1. If the currrent tracking step has been completed, click **Change Tracking Step** in the Edit Tracking window.
2. In the **Change Tracking Step** panel, enter or update information as needed:

   - **Next Step**

     Automatically displays the next step in the production cycle. Select a different step if desired. Tracking steps and their order are set in Setup > Tracking Steps.

   - **Assign To**

     If the next step is to handled by a resource, click … and look up the resource. See Looking up resources.

   - **Step Due Date**

     Deadline for next step. Default is calculated based on number set for the step in Setup > Tracking Steps.

   - **Remarks**

     Any special notes for the new step

3. Click **Save.**
4. In the Edit Tracking windows General pane, **Step** updates to the new step, and the **Step History** pane documents the change. Step History records the history of tracking step changes and is un-editable. To record your own notes, use the **Notes Log,** see Making entries in notes logs.

5. Save updates

Click **Save.**

IMPORTANT: RB9 marks when tracking is completed

If you move to the last step in the workflow, RB9 will automatically complete the tracking item by changing **Status** from "In Progress" to "Completed." **End Date** will default to today's date.

Reference

- Turn In
- Tracking lists
- Tracking Steps

- Lookup panel
- Date Navigator
- Notes Logs

Step-by-step instructions

- Monitoring production
- Updating jobs
- Updating cases
- Entering video information
- Looking up resources
- Making entries in notes logs

Generating production sheets

After all jobs 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:

   - **Job No.**

     Enter the job number.

   - **Turned In Date**

     Enter the date the job was turned in, or click to look up date in the Date Navigator.

   - **Rush Type**

     Default is ALL. Click to restrict search to service items with a specific turnaround time (see Lookup panel). Options are set in Rush Type Master.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

   - **Show Produced Items**

     Defaults to No. If you want a report that shows both completed service items and work still to be completed, slide to Yes.

2. View results

Click . RB9 lists all of the jobs (along with their service items) that meet the specified search condition(s) as a report.

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.

TIP: Start tracking production & storage

Use the Production Sheet as a guide for service item production to track in RB9's Tracking

module *(RB9 Standard only)*. Tracking is independent of other modules, but if service items pass through multiple hands as they move through your production workflow, Tracking can ensure that nothing slips through the cracks.

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
- Rush Type Master
- Business Units
- Tracking

Step-by-step instructions

- Searching in RB9
- Printing invoices, statements & reports
- Shipping to clients
- Adding & updating individual service items
- Finalizing invoices

DYMO

DYMO (dymo.com) is a popular line of label printers that is compatible with RB9.

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

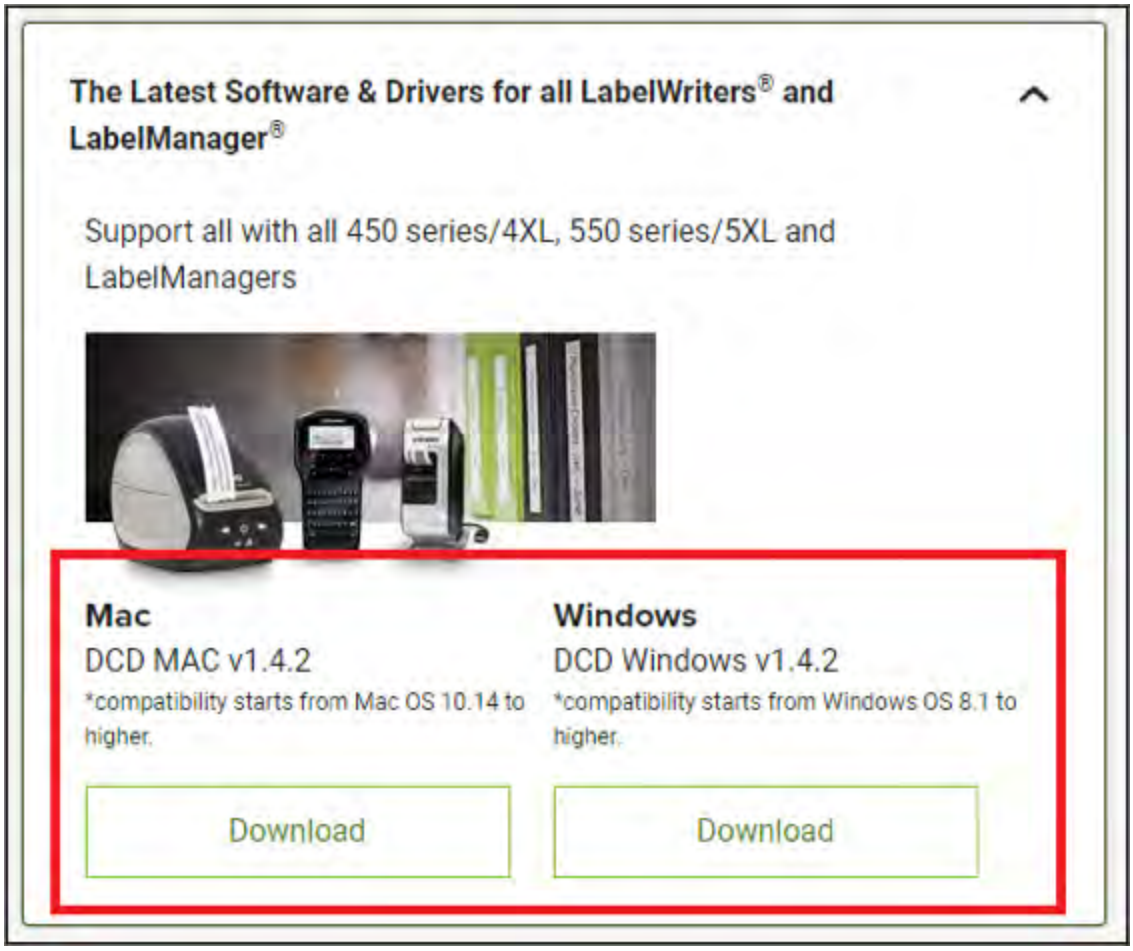
RB9 Standard only

Before you can print labels in RB9, you must have a DYMO printer that is ready to print labels in a web environment.

Continued from Printing labels.

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 RB9 for everyone on your staff to use. To create DYMO label templates, see Creating DYMO label templates. To add your label templates to RB9, see Managing label templates.

Reference

- DYMO
- Label templates

Step-by-step instructions

- Printing labels
- 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

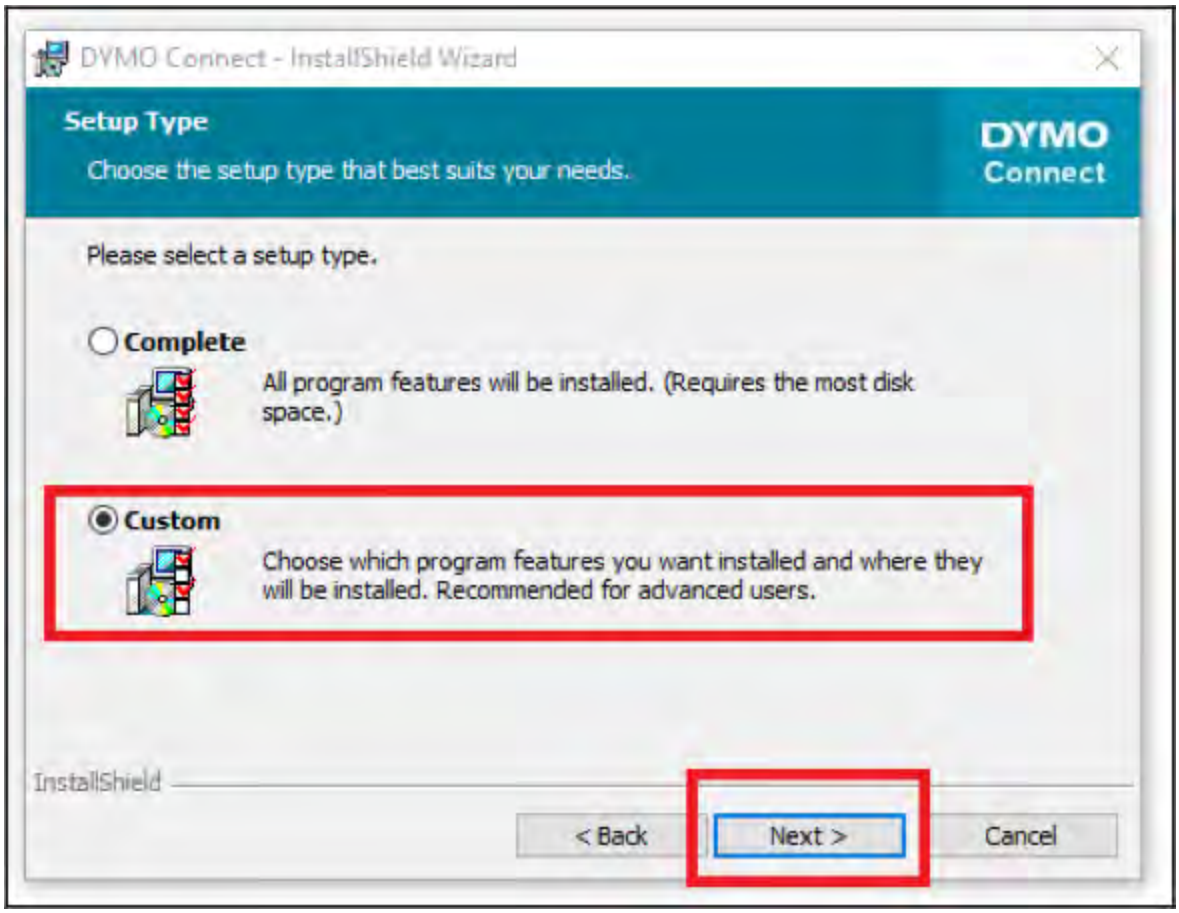
RB9 Standard only

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 RB9.

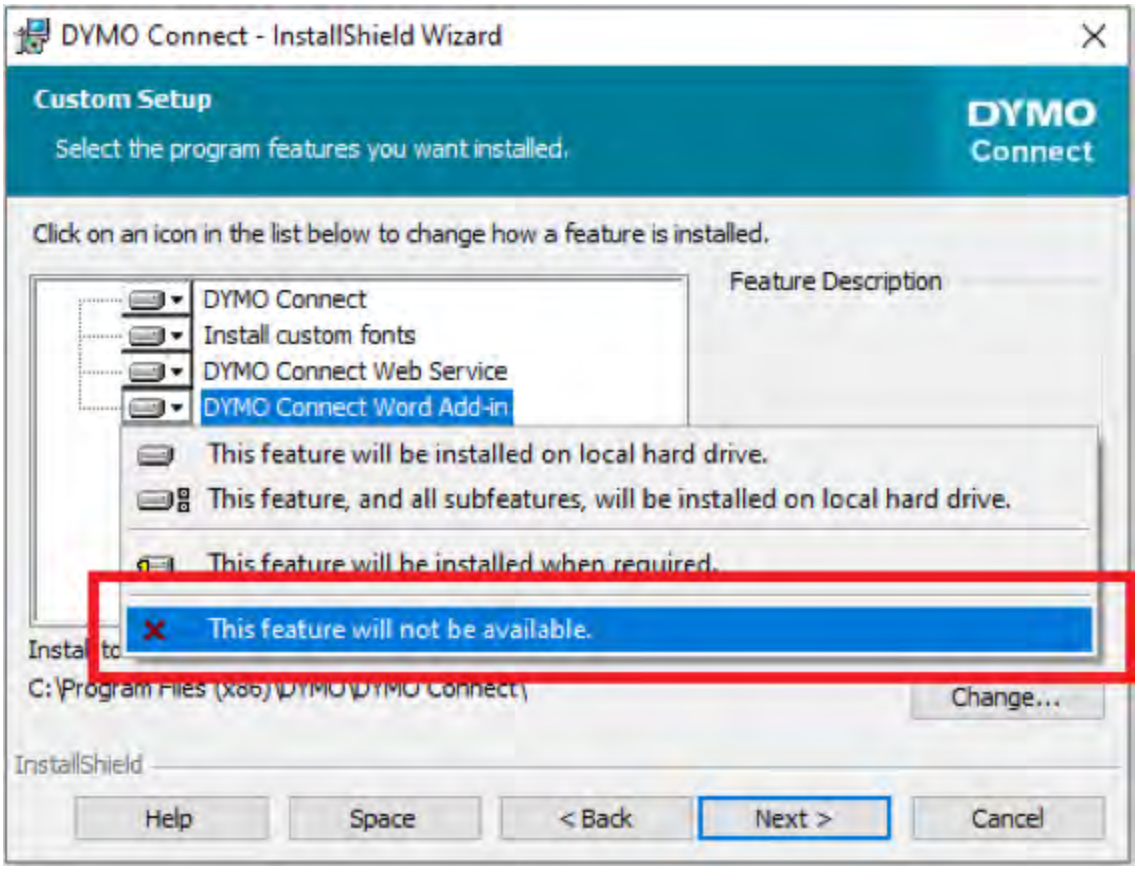
Continued from Setting up for online label printing.

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.**



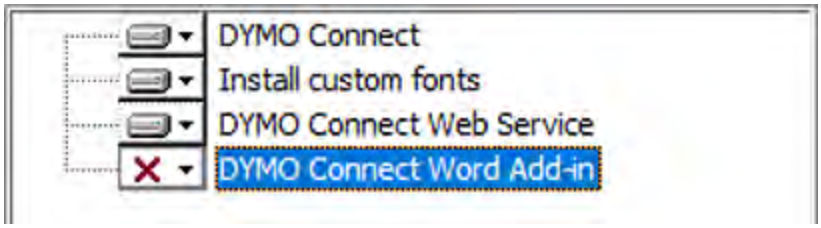
7. In Custom Setup, select **DYMO Connect Word Add-in,** then click **This feature will not be available.**



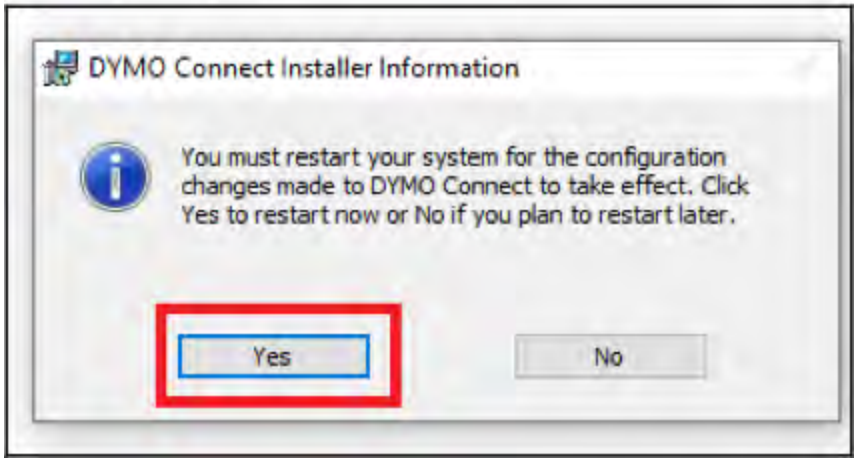
NOTE: Skip this step if you want to use DYMO with Word

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).

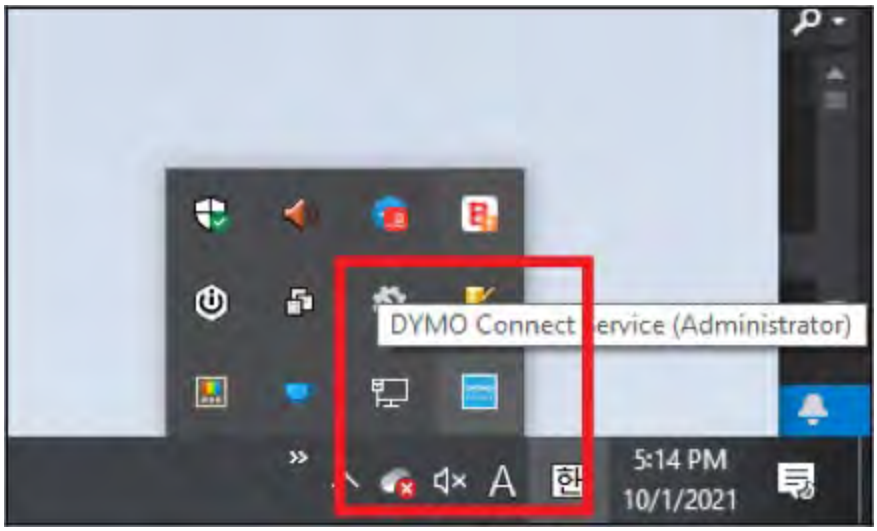
8. When **DYMO Connect Word Add-in** is disabled, click **Next.**



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.



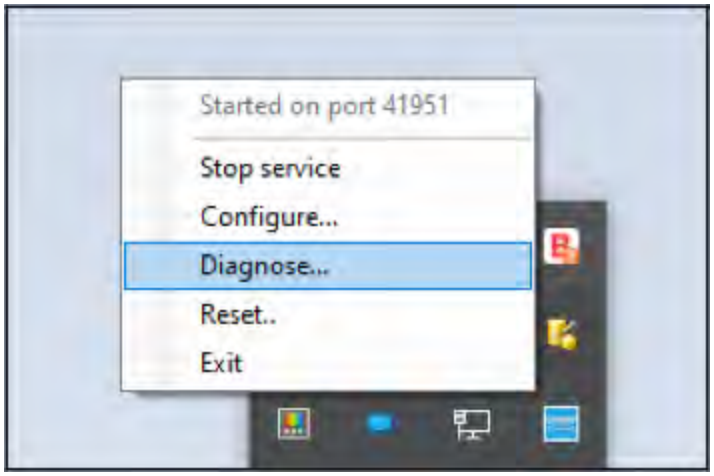
13. Confirm whether the Dymo Connect Web service icon exists in the notification area from the Windows taskbar.



If the icon is missing:

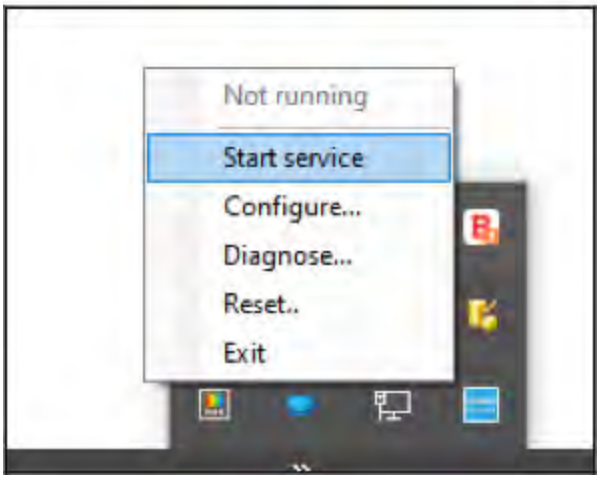
1. Check if the file exists in the following path:
   C:\Program Files (x86)\DYMO\DYMO Connect\
2. Select the "DYMO.Webapi.Win.Host.exe" file, and double click to execute.

14. Right-click on the Dymo Connect icon from the notification area of the Windows taskbar. When the menu appears, click **Diagnose.**

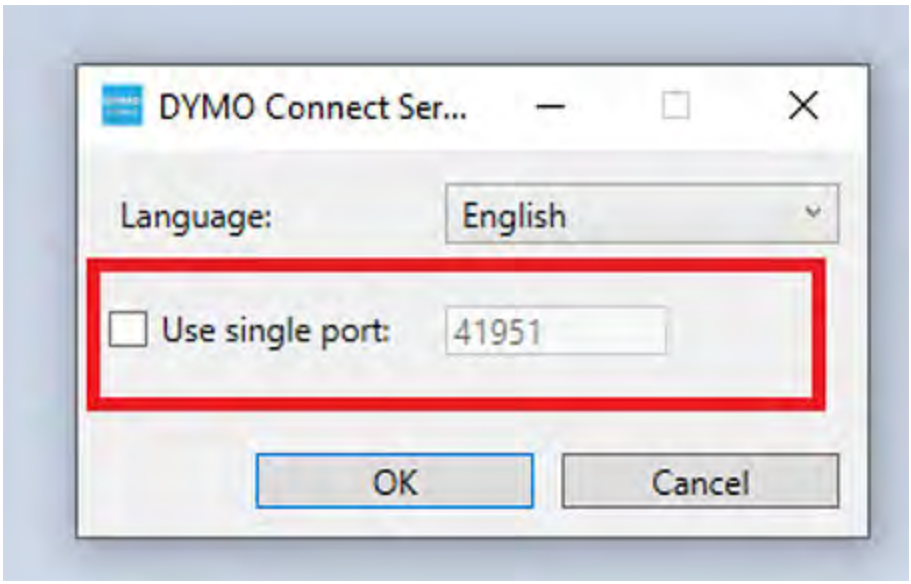


15. If the DYMO Connect Service is properly implemented, the popup message will display the port information. Click **OK.**
    If a different message appears, click **OK,** then check the following:

    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

- Printing labels
- Setting up for online label printing
- Creating DYMO label templates
- Managing label templates

Setting up DYMO in Mac OS

RB9 Standard only

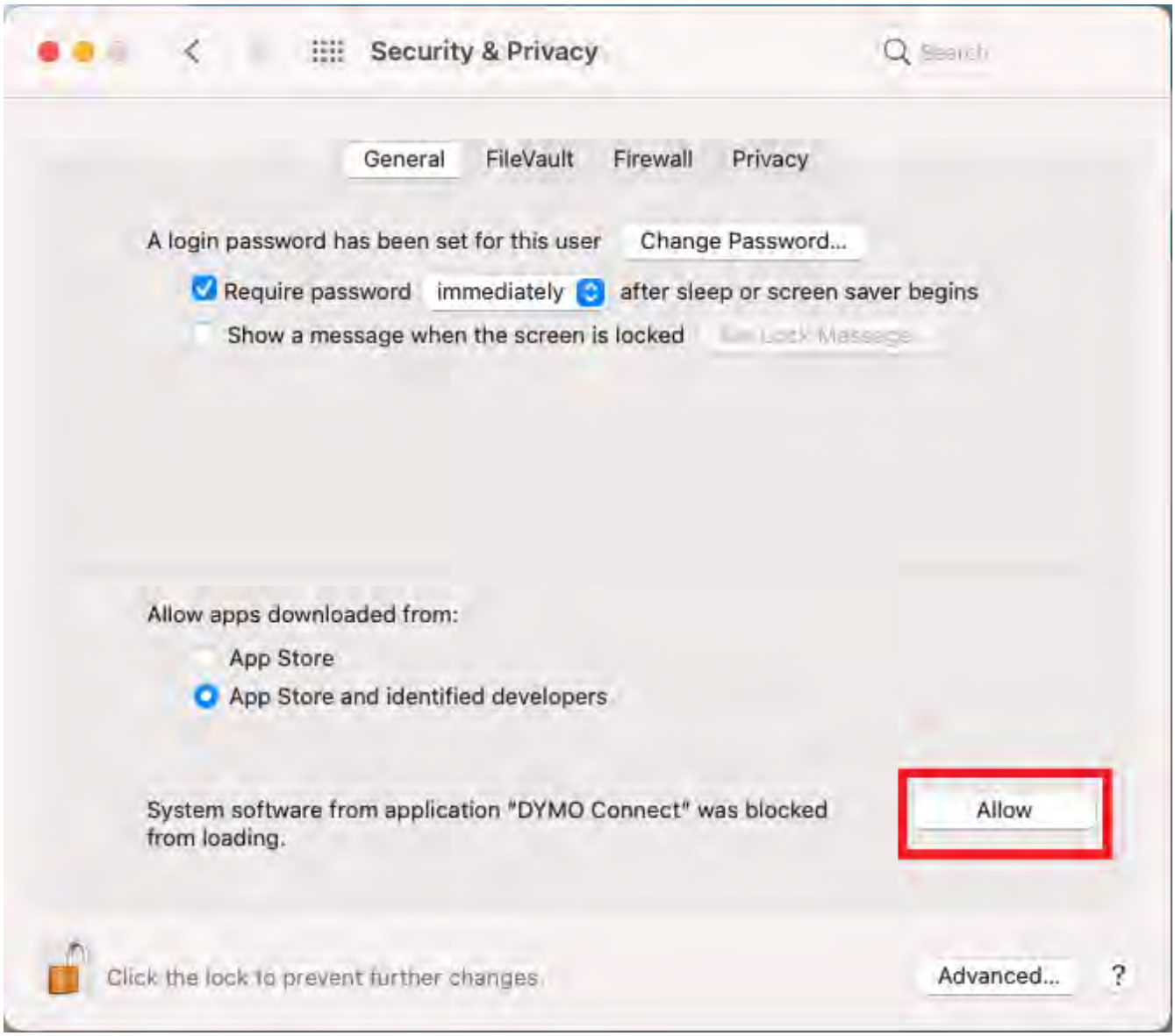
If your computer has a Macintosh operating system, after downloading DYMO software, you must install it and configure your system to use a DYMO printer before printing labels from RB9.

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, and return to the DYMO Connect app.

Reference

- DYMO
- Label templates

Step-by-step instructions

- Printing labels
- Setting up for online label printing
- Creating DYMO label templates
- Managing label templates

Printing envelopes and labels

RB9 Standard only

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

1. Designate recipient

1. **Production > Envelopes and Labels**
2. In Envelopes and Labels window **Search By** pane's **For** drop-down, 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 RB9 database, enter recipient name and address in blank label in **Recipient** pane.

   - ### Case

     Click to look up a case. See Looking up cases. RB9 will list all parties to the case with their default address(es) in label format in the **Recipient** pane.

   - ### Contact

     Can use either or both fields:

     Firm – Click to look up a firm. See Looking up firms. RB9 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. RB9 will list all of the firm's contacts with their default address(es) in label format in the **Recipient** pane.

   - ### Invoice Bill To

     Enter the number of an invoice addressed to a billed client or third-party payer in **Invoice No.,** then click . Billed party and their default address appear in label format in the **Recipient** pane.

   - ### Invoice Sold To

     Enter the number of an invoice for a job scheduled by a client in **Invoice No.,** then click . Scheduling party and their default address appear in label format in the **Recipient** pane.

- **Job**

  Enter a job number in **Job No.,** then click . RB9 will list all of the parties to the job 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.

- **Resource**

  Click to look up a resource. See Looking up resources. The resource and their default address appear 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 drop-down, then clicking :

   - **Firm Address**

     Entity's business address. Default for firms, contacts, case, invoice billed to/sold to clients, and job 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

   - **Resource Address**

     Main address for resource. Depending on the resource, it could be a business address, home address, or P.O. box. Default for resources.

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

2. Print label/envelope

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

Reference

- PDF
- DYMO

- Sold To vs. Bill To
- Label templates

Step-by-step instructions

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

Printing labels

RB9 Standard only

With a DYMO printer and RB9 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 drop-down.

     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 drop-down. (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 RB9 for everyone on your staff to use. To create DYMO label templates, see Creating DYMO label templates. To add your label templates to RB9, 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

RB9 Standard only

When clients call to find out where their order is, you don't have to leave RB9 to check the shipping status. Initiate shipping within RB9, including printing FedEx and UPS labels. Then keep track of when and via what method you send jobs out, update job status, and even follow up an order's current location if sent via FedEx or UPS.

TIP: Initiate shipping from Turn In

You do not have to leave Turn In to initiate shipping for a turned-in job. Instead, click **Shipping** at the top of the job's Turn In window, and the main Shipping window will open with the job's Job No. already filled in and all invoiced clients listed.

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:
   - **Job No.**

     Job number associated with the service item(s) you are sending.
   - **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. 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). BUs are set in Business Units.
3. Click . RB9 lists all jobs that meet the search criteria.
4. To:
   - **Check shipping status or update info**

     Click the **Delivery Method** hyperlink of an invoice or job 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

- Tracking shipments
- Shipping to clients

Shipping to clients

RB9 Standard only

When sending completed service items to clients, use Shipping to print a FedEx or UPS label from within RB9, and you will be able to track the shipment from here too. You can also designate other sending methods, such as via courier or email. And if your billing department does not invoice a job until it has shipped, change a job'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 job number for which you want to send another shipment.

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

4. In the **Include** pane, service items that were billed on the invoice are listed by witness. Check the box(es) for the witness(es) 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:

  - **Sold To** – Default. Client listed in the **Sold To Firm/Sold To Contact** as ordering the job.
  - **Bill To** – Client listed in the **Bill To Firm/Bill To Contact** as paying for the job.
  - **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 select FedEx or UPS,** click **Create Shipping Label.** See Shipping via FedEx and UPS.
     - **If you select Email,** see Sending letters, and be sure to include the service items as attachments to the email.
     - **If you select one of the other methods**, see Printing labels.

   - ### Tracking No.

     If you created a FedEx or UPS label, RB9 fills in this number.

   - ### Ship Date

     If you created a FedEx or UPS label, RB9 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 job status

   If your billing department does not invoice a job until it has shipped, notify them by changing the job'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 a job’s status later by:

- Finding the shipment in Shipping and changing the status in its Edit Shipment window.
- Updating the status in the job’s detail window. See Changing case or job status.

Reference

- Turn In
- Sold To vs. Bill To
- Production lists
- Date Navigator

Step-by-step instructions

- Searching shipping
- Updating jobs
- Updating cases
- Updating firms
- Updating contacts
- Shipping via FedEx and UPS
- Sending letters
- Printing labels
- Tracking shipments
- Changing case or job status

Shipping via FedEx & UPS

RB9 Standard only

With your FedEx and/or UPS account(s), you can print official labels and track shipments without leaving RB9.

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. RB9 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 RB9. To print using:
  - **The original address** – Click **Skip.**
  - **A recommended address** – Click radio button for the desired address, then click **Replace.**

2. RB9 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 a job until it has shipped, notify them by changing the job's status to Shipped. See Changing case or job 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 case or job 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**

     FedEx only

     Uneditable. Default is FedEx 2Day.

   - **Price Option**

     FedEx only

     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 RB9 information on the label, Select Yes for up to 3 options (FedEx) or 2 options (UPS):

   - **Print Invoice No.**

     The related RB9 invoice number.

   - **Print Job No. in Purchase Order Number section**

     The related RB9 job number.

- **Print Witness in Department Number section**

  The related witness name from RB9.

- **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 drop-down. 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

RB9 Standard only

When clients call to find out where their order is, you don't have to leave RB9 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 shipping or its related job, case, and contacts.

1. Track shipping

1. To find a shipment to track, see Searching shipping.
2. To see where a FedEx or UPS shipment is at any time, click **Tracking No.**'s in the View Shipment window.

   RB9 automatically opens the related shipping company's webpage in your browser showing the current status of your shipment.

2. Update details

In the View Shipment window, click **Edit.** You can update some information and selections. See Shipping to clients.

Step-by-step instructions

- Searching shipping
- Shipping to clients

Sending letters

RB9 Standard only

Correspond with contacts, witnesses and third parties about turned-in jobs, with relevant details about the jobs filled in by RB9 automatically. Email letters can include cc's and bcc's. You can edit letters before emailing or printing. You can also customize the form letters used. RB9 records letters sent via email in the Email Log.

1. Find job

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

     Enter a job number.
   - **Job Date From/Job Date To**

     Enter a date range that includes the scheduled job, if desired (see Date Navigator).
   - **Job Status**

     Stage the job is in, e.g., New or Cancelled. Default is ALL. Click to restrict the results (see Lookup panel). Job status options are set in Lists > Jobs.
   - **Case**

     To restrict results to a single case, see Looking up cases.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.
3. Click . RB9 lists all of the jobs that meet the specified search condition(s). Listings are color coded based on their job status. (Job status colors are set in System Preferences > Calendar > Job Status Color.)

2. Create & send letter

Click next to the job you want to correspond about, then:

- **Letter to Contact**

  To send a letter to a job party, see Sending letters to contacts.

- **Letter to Witness**

  To send a letter to a job witness, see Sending letters to witnesses.

- **Letter to Other**

  To send a letter to a third party about a job, see Sending letters to others.

TIP: Customize form letters to fit your business

Edit any form letter template, if desired, and create your own templates from the existing ones.

Reference

- Email Log
- Date Navigator
- Lookup panel
- Jobs lists
- Business Units
- Job Status Color preferences
- Form Templates

Step-by-step instructions

- Looking up cases
- Sending letters to contacts
- Sending letters to witnesses
- Sending letters to others
- Creating/updating forms & letters

Sending letters to contacts

RB9 Standard only

Email transcripts to and correspond with a contact about a turned-in job using RB9 form letters, which automatically include relevant details about the job. Edit the letter before emailing or printing the letter to send. If emailing, you can add or remove Cc and Bcc contacts, enter a custom Subject line, and attach files.

Continued from Sending letters.

1. Set up recipient

1. In the Letter to Contact window, basic job and case information appears at the top. Click next to any field to view and edit details, if desired.
2. All of the contacts turned in for the job are displayed in the **Parties** pane.
   - Click the **Send To** radio button to select the letter recipient.
   - Check the box(es) of contact(s) you want cc'ed on the letter.
   - If a party does not appear in the list, click to look up the party. See Looking up contacts.
3. Deponents for the job are displayed in the **Witnesses** pane with the **Include** box checked. If you do not wish a deponent to be listed on the letter, uncheck their box.
4. Click **Next.**

2. Select letter

1. In the **Select a Letter** panel, click the desired letter template in the **Form** pane. (If template doesn't appear in the pane, select a different set of forms in **Form Group.)**
2. In **Send Method:**
   - **Email**
     Default method of sending letters.
   - **Print**
     To send letter via the post or other delivery service.
3. Click **Next.**

3. **Send**
    - **If emailing,** see Composing emails & text messages.
    - **If printing,** see Printing letters.

Step-by-step instructions

- Sending letters
- Looking up contacts
- Composing emails & text messages
- Printing letters

Sending letters to witnesses

RB9 Standard only

Correspond with a witness about the transcript of their deposition using RB9 form letters, which automatically include relevant details. Edit the letter before emailing or printing the letter to send. If emailing, you can add or remove Cc and Bcc contacts, enter a custom Subject line, and attach files.

Continued from Sending letters.

1. Set up recipient

1. In the Letter to Witness window, basic job and case information appears at the top. Click next to any field to view and edit details, if desired.
2. Any deponents for the job are displayed in the **Witness** pane with the first witness selected. Click the **Send To** radio button of a different witness to change the letter recipient.
3. Enter the witness's mailing address in:
   - **Address 1**

     Street address, P.O. box, company name, c/o
   - **Address 2**

     Apartment, suite, building, floor, etc.
   - **Address 3**

     City, State ZIP
4. Enter the witness's name as you want it to appear in the letter's salutation in **Dear.**
5. All of the contacts ordering transcripts are displayed in the **Parties** pane with the **Include** box checked.
   - If you do not wish a party to be cc'ed on the letter, uncheck their box.
   - If a party does not appear in the list, click to look up the party. See Looking up contacts.
6. Click **Next.**

2. Select letter

1. In the **Select a Letter** panel, click the desired letter template in the **Form** pane. (If

template doesn’t appear in the pane, select a different set of forms in **Form Group.)**

2. In **Send Method:**

   - **Email**
     Default method of sending letters.

   - **Print**

     To send letter via the post or other delivery service.

3. Click **Next.**

3. Send

- **If emailing,** see Composing emails & text messages.
- **If printing,** see Printing letters.

Step-by-step instructions

- Sending letters
- Looking up contacts
- Composing emails & text messages
- Printing letters

Sending letters to others

RB9 Standard only

Correspond with a third party about a turned-in job using RB9 form letters, which automatically include relevant details. Edit the letter before emailing or printing the letter to send. If emailing, you can add or remove Cc and Bcc contacts, enter a custom Subject line, and attach files.

Continued from Sending letters.

1. Set up recipient

1. In the Letter to Other window, basic job and case information appears at the top. Click next to any field to view and edit details, if desired.
2. In the **Send To** pane, enter the recipient's name in **Name.**
3. Enter the recipient's mailing address in:
   - **Address 1**
     Street address, P.O. box, company name, c/o
   - **Address 2**
     Apartment, suite, building, floor, etc.
   - **Address 3**
     City, State ZIP
4. Enter the recipient's name as you want it to appear in the letter's salutation in **Dear.**
5. Click **Next.**

2. Select letter

1. In the **Select a Letter** panel, click the desired letter template in the **Form** pane. (If template doesn't appear in the pane, select a different set of forms in **Form Group.)**
2. In **Send Method:**
   - **Email**
     Default method of sending letters.
   - **Print**
     To send letter via the post or other delivery service.
3. Click **Next.**

3. **Send**

   - **If emailing,** see Composing emails & text messages.
   - **If printing,** see Printing letters.

Step-by-step instructions

- Sending letters
- Looking up contacts
- Composing emails & text messages
- Printing letters

Tracking original transcripts

RB9 Standard only

Track the location of original transcripts, plus keep detailed notes about where and when you sent them and when they were returned.

1. View sent transcript status

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

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

     Enter a date range that includes the scheduled job, if desired (see Date Navigator).

   - **Job No.**

     Enter the job number.

   - **Case**

     To restrict results to a single case, see Looking up cases.

   - **Date Type**

     Sent Date – Default. Date original was sent out.

     Received Date – Date original was returned.

     Return Due Date – Date you expect the original transcript to have been read, signed and returned to your office.

   - **Date From/Date To**

     Works with **Date Type.** 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 witnesses tied to specific BUs (see Lookup panel). BUs are set in Business Units.

3. Click . RB9 lists all of the witnesses who meet the specified search condition(s) with information about their transcripts, including **Sent, Received,** and **Return Due Dates.**

2. Update status

1. To view more details/update the tracking information for a witness, click the witness or click their >
   - **View** – To open the witness in their View window.
   - **Edit** – To open the witness in their Edit window.
2. RB9 displays the selected witness's status and other details in the View/Edit Witness window. To update the witness from the View Witness window, click **Edit.**
3. In the Edit Witness window, scroll or jump to the **Additional** pane. See Entering additional witness information.
4. Click **Save.**

Reference

- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up cases
- Entering additional witness information

Using repositories

Store documents linked to a case, job, task, witness, invoice, firm, contact, location, resource, or all resources 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 has access via RB Connect and downloaded it from there. Download files for viewing, archiving, or emailing. Alert clients when files are uploaded. Delete files you no longer need to store.

- ## Uploading & granting access to files

  Upload related files within individual cases, jobs, tasks, witnesses, invoices, firms, contacts, locations, and resources. (Upload files you want all resources to have, such as a blank billing sheet, to the All-Resources level repository in the central repository.) Upload multiple files at a time.

  Categorize files by file type to make searching easier and to have RB9 automatically attach relevant files to emails. If documents are 'published,' contacts and resources can access them through RB Connect. Restrict which clients can access specific files. See Uploading files to a repository.

- ## Searching repositories

  Search for files in a single repository or across all repositories at once. Use filters to narrow results returned. 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 RB Connect or recipients do not have web access. See Downloading & viewing files.

- ## Viewing file details

  To view RB9 information about a file, such as its download history, see Viewing & updating repository file details.

- ## Alerting clients to files

  If you have RB Connect, email clients to alert them when you have published their files online. In the **Repository** pane of a case, job, witness, invoice, firm, resource or location, check the box(es) of any file(s) you want to include in an alert email to a client. Then click . See Alerting clients.

Deleting files

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).** 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 and resources can access through RB Connect, see Updating file values quickly.

Reference

- RB 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

Uploading files to a repository

Store files in their related repository within individual cases, jobs, tasks, witnesses, invoices, firms, contacts, locations, and resources. If you have a file to share with resources, such as a blank billing sheet, upload it to the All-Resources level repository in the central repository.

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 RB9 automatically attach relevant files to emails.

You can also publish specific repository files and designate who can have access to them through RB Connect. Plus send email alerts to contacts that files are available for download.

You can upload files of any type and size to RB9'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 a case, job, task, witness, invoice, firm, resource or location. The **Select Files** panel appears.

NOTE: The 2 types of resource repositories

Uploading files in the **Repository** pane of a Resource window only allows file access to that specific resource. If you want to give all resources access to a file, you must upload it in **Production > Repository.** In the Repository window, click **New > All-Resources level.**

2. Select file(s) to upload

1. In RB9, 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 ASCII or Exhibit, in the drop-down. (File types and default are set up in Lists > Repository.)

- **Publish**
  Yes by default, slide to No if you do not want to give online access to the file through RB Connect to clients and resources.

- **Access Type**

  Repository files are always accessible to your office, and the default access is ALL, meaning others (clients and/or resources) have access through RB Connect. You can restrict access to your company only, or your office and clients/resources by selecting from this drop-down.

  NOTE: Restrict individual contacts' access to a file

  Access Types "ALL" and "Contacts and Office" give file access to all contacts associated with a job/case, their seniors, and Sold To contacts for a witness. If you don't want to give an included contact access to a specific file in the Witness-level repository in Turn In, you can remove their access. For example, if Witness A has a PDF transcript, video, and exhibits in the repository, you can designate that Contact 1 can access only the PDF transcript and exhibits, while Contact 2 can access only the PDF transcript and video file. See Restricting contacts' file access.

- **Description**
  Any text entered here also appears in RB Connect and is searchable.

TIP: Speed option setting

When uploading multiple files at once, save time setting file options by clicking **Set Value > Access Type/File Type/Publish.** In the **Set Value** panel, set the option's value (such as File Type: Exhibit), then check the boxes of the files in the **Apply To** list you want to have that option. Or check the box at the top of the list to select them all. Click **OK.**

NOTE: Number exhibits automatically when uploading to the repository

When uploading exhibits to the Witness repository in Turn In, you can have RB9 automatically number the exhibits sequentially. (See Adding stamps to exhibits.)

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. If the repository file with the same name is due to a failed upload attempt previously, you can choose to remove the existing file, then continue uploading the correct file. Otherwise, if the file has the same name as a file that uploaded correctly, you will be told to rename the new file and try again. Click **OK.**

2. To alert contacts that the file is available to download from RB Connect, see Alerting clients.

TIP: Include blank billing sheets in Assignment Notifications

Make resources' lives easier by giving them a blank billing sheet when notifying them of jobs. Upload your blank billing sheet to the All-Resources repository with Billing Sheet as its **File Type.** Then in **Setup > System Preferences > Calendar > Assignment Notification,** select "Billing Sheet" in **File Type to be automatically attached to email from All-Resources-level, Firm-level, Job-level, Task-level, and Case-level repository** drop-down. See Assignment Notification preferences.

NOTE: Other types of file uploads

You can also upload:

- **Image files of your company logo** to use in correspondence and PDF transcripts. See Adding your company logo to invoices and Adding your company logo to transcripts.
- **Files as attachments to emails.** See Composing emails & text messages.

Reference

- RB Connect
- ASCII
- Repository lists
- Seniors
- Sold To vs. Bill To
- Turn In
- Assignment Notification preferences

Step-by-step instructions

- Using repositories
- Restricting contacts' file access
- Adding stamps to exhibits
- Alerting clients
- Adding your company logo to invoices
- Adding your company logo to transcripts
- Composing emails & text messages
- Attaching files to notifications automatically

Adding stamps to exhibits

RB9 Standard only

You can have RB9 number exhibits automatically when uploading them to the Witness repository in Turn In. Create one or more stamp templates to match different specifications first in Setup > Exhibit Stamps, then select the appropriate stamp when uploading.

You can also give your reporters the ability to number exhibits automatically when uploading them during online turn in through RB Connect. (See Resource – Turn In preferences.)

Continued from Adding witnesses > Uploading files to a repository.

IMPORTANT: Prepare exhibit files before uploading

To be able to apply numbered exhibit stamps in RB9, exhibit files must be set up correctly before uploading to the Witness repository:

- Files must be in PDF format.
- File names must be numbered consecutively.
- If there is any text other an a number in the file name, the number must appear last.

1. In the **New Repository** panel of an **Edit Witness** panel of a job in Turn In, make sure the **File Type** of any PDF exhibits you are uplading is set to Exhibit. Then check the **Add Exhibit Stamp** box before uploading exhibit files.
2. Click **Upload file(s).**
3. In the **Set Stamp and File Name Pattern** panel, select:
   - ***Exhibit Stamp**
     Required. In the drop-down, click the stamp template you want to apply to these exhibits. Stamp templates are created and stored in Exhibit Stamps.
   - ***File Name Pattern**
     Required. Enter the common portion of the file names of the exhibits being uploaded and add "?" at the end for the file number. For example, if you are naming exhibit files Exhibit 1, Exhibit 2, enter Exhibit ?.
4. Click **OK.** RB9 adds the numbered stamps and uploads the files.

Reference

- Turn In
- Exhibit Stamps
- RB Connect
- Resource – Turn In preferences
- PDF

Step-by-step instructions

- Using repositories
- Adding witnesses
- Uploading files to a repository

Searching repositories

Search for files in a single repository or across all repositories at once. Use filters to narrow results returned.

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 drop-down. 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 and options 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 drop-down, depending on the repository you are searching.

  - **Upload Date** – Default. When the file was uploaded to RB9.
  - **Job Date** – *ALL, Job, Task, and Witness repositories only.* When the related job is/was scheduled to occur.
  - **Order Date** – *ALL and Task repositories only.* Includes assignments for write-ups ordered for previously billed non-transcribed jobs.
  - **Invoice Date** – *ALL and Invoice repositories only.* Date job was billed.

- **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 and resources upload files through RB Connect, you can search files uploaded by one of those groups by selecting it in this drop-down.

- **Uploaded By**

  Restrict the search by specifying the person who uploaded the file(s). Click , then in the Lookup User/Contact/Resource popup, find the person's name. See Searching in RB9.

- **Job No.**

  Not available in All-Resources, Case, Contact, Firm, Invoice, Location, Resource repositories

  Enter a job number to find files related to a single job.

- **Invoice No.**

  Not available in All-Resources, Case, Contact, Firm, Job, Location, Resource, Task, Witness repositories

  Enter an invoice number to find files related to a single invoice.

- **Case**

  Not available in All-Resources, Contact, Firm, Invoice, Location, Resource, Task, Witness repositories

  Click to look up and select a case (see Looking up cases).

- **Firm**

  Not available in All-Resources, Case, Invoice, Location, Resource, Task, Witness repositories

  Click to look up and select a firm (see Searching firms).

- **Contact**

  Not available in All-Resources, Case, Firm, Invoice, Job, Location, Resource, Task, Witness repositories

  Click to look up and select a contact (see Searching contacts).

- **Resource**

  Not available in All-Resources, Case, Contact, Firm, Invoice, Job, Location, Task, Witness repositories

  Click to look up and select a resource (see Searching resources).

- **Location**

  Not available in All-Resources, Case, Contact, Firm, Invoice, Job, Resource, Task, Witness repositories

  Click to look up and select a location (see Searching locations).

3. Click .
4. RB9 displays all files that fit 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 the settings for a file or group of files, see Updating file values quickly.

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
- Repository lists
- Date Navigator
- RB Connect

Step-by-step instructions

- Using repositories
- Searching in RB9
- Looking up cases
- Searching firms
- Searching contacts
- Searching resources
- Searching 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 a case, job, task, witness, firm, contact, resource or location window.

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 RB9 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 that has a repository, scroll or jump to the **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. RB9 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: 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.

TIP: Download a file from its detail panel

You can download a file from within its detail window, see Viewing & updating repository file details.

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 *Microsoft Windows'* Help.

Reference

- RB 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 a case or job. Update information about files, such as file and access types. Download files to view, print or email. In Witness repositories, convert ASCII files to RB-PDF Transcripts.

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 Case/Job/Witness/Invoice/Firm/Contact/Resource/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** or **Create Full-Text Search** ***(RB9 Standard only)***, 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 file size, who uploaded the file, related case, job number & date, invoice number & date, witness, firm, contact, resource, and location.
2. For more information than listed in the repository grid, click the file's hyperlinked **File Name.**

2. View details

1. In the View Repository window, you can view the following:
   - **Repository Level**

     Central repository only

     Repository where the file is stored. Depending on the repository level, additional fields identify the RB9 entry attached to the file.
   - **File Name**

     Complete file name including the file extension. Click to download the file.
   - **File Type**

     Category the file belongs to, such as ASCII or Exhibit. (File types and options are set in Lists > Repository.)

- **File Size**

  In kilobytes (1KB=1000bytes).

- **Access Type**

  Which types of entities have access to this file via RB Connect.

- **Publish**

  If Yes, file is accessible via RB 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 >**

   - **Create PDF Transcript**

     (Only in View Witness/Edit Witness windows)
     To generate an RB-PDF Transcript from an ASCII file, see Creating PDF transcripts.

   - **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, Contact, or Resource). Click **Close.**

   - **View Accessible Contacts**

     (Only in View/Edit Case, Job, Invoice, & Witness windows)
     In the **View Accessible Contacts** panel, all contacts who can access the file via RB 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 Witness-level repository of a job 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 Case/Job/Witness/Firm/Contact/Resource/Location window, click **Edit.** Then click the file's hyperlink in the **Repository** pane.

- **Individual repository**
  In the View Case/Job/Witness/Firm/Contact/Resource/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 ASCII or Exhibit, in the drop-down. (File types and options are set up in Lists > Repository.)

   - **Access Type**

     Restrict access to your company only, or your office and clients/resources by selecting from this drop-down.

   - **Publish**

     Yes by default, slide to No if you do not want to give online access to the file through RB Connect to clients and resources.

   - **Description**

     Any text entered here also appears in RB Connect and is searchable.

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/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 Case/Job/Witness/Invoice/Firm/Contact/Resource/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/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 Case/Job/Witness/Invoice/Firm/Contact/Resource/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 its File Type, Access Type, or Publish status, use **Set Value/** to change them all at once to the same value. See Updating file values quickly.

Reference

- Create Full-Text Search
- Turn In
- ASCII
- Repository lists
- RB Connect

Step-by-step instructions

- Using repositories
- Searching cases
- Searching jobs
- Searching witnesses
- Searching firms
- Searching contacts
- Searching resources
- Searching locations
- Searching repositories
- Creating PDF transcripts
- Restricting contacts' file access
- Downloading & viewing files
- Updating file values quickly

Alerting clients

RB9 Standard only

If you have RB Connect, email clients to tell them they can access their files after you have uploaded the files online. Or alert clients when you have published a transcript package to their RB Connect account.

Continued from Using repositories Uploading files to a repository, or Assembling transcript packages.

1. Select recipients

1. In the **Send To** panel, your RB Connect site name appears in the **Connect Site** drop-down. If you have more than one RB Connect site connected to your RB9 database, you can select the appropriate one in the drop-down. (Your site name is set in General Connect preferences.)
2. The ordering contact, job party contacts, and any of their seniors are listed under **Accessible Contacts.** Sold To contacts are selected by default. If you do not want to notify a Sold To contact about the uploaded file, uncheck their box. Grant Access contacts are indented and labeled "Grant Access" in the **Access Level** column. Check the boxes of any Grant Access contacts you want to notify. (Any contacts missing a checkbox means they do not have an email address in their RB9 file. See Entering general contact information.)
3. Click **Next.**

2. Customize alert & send files

1. In the **Email** panel, the email recipient(s) you selected appear in ***To.** Default information from your preferences appears in ***Subject** and ***Message.** (Defaults are set in Connect Preferences > Contact–Repository or Contact–Transcript Packages.) You can edit recipients, add Cc's and Bcc's, edit content, and attach files. See Composing emails & text messages.
2. Click **Send.** RB9 sends the email and logs it into the Email Log.

Reference

- RB Connect
- Transcript Package
- General Connect preferences
- Seniors
- Contact–Repository preferences

- Contact–Transcript Packages preferences
- Email Log

Step-by-step instructions

- Using repositories
- Uploading files to a repository
- Assembling transcript packages
- Entering general contact information
- Composing emails & text messages

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 RB Connect is permitted, for one or more repository files related to a single entity, case, job or witness, or across repositories.

Continued from Using repositories.

1. To find files to update:

   - **Individual repository**
     In a View Case/Job/Witness/Firm/Contact/Resource/Location window, scroll or jump to the **Repository** pane. All files uploaded to this individual entity, case, job or witness 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)' RB Connect access in the drop-down to:

     - **ALL:** Your staff, clients, and resources
     - **Contacts and Office:** Your staff and clients
     - **Office Only:** Your company staff
     - **Resources and Office:** Your staff and resources

   - **File Type**

     In the **Set Value** panel/popup, select the category the file(s) belong to, such as ASCII or Exhibit, in the drop-down. (File types and options are set up in Lists > Repository.)

   - **Publish**

     In the **Set Value** panel/popup, slide to Yes to give online access to the file through RB Connect to clients and resources 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

- ASCII
- Repository lists
- RB Connect

Step-by-step instructions

- Using repositories
- Searching repositories

RB-PDF Transcripts

RB9 Standard only

RB-PDF Transcripts are PDF versions of your reporters' ASCII transcripts. As PDFs, they retain the appearance of the original document and can be easily shared with others because PDF is a universal format.

As a part of RB9, they automatically include job and case information from your RB9 database, are fully customizable, and can include condensed transcripts, word lists, word indexes, and linked exhibits.

You can create and apply stamps to RB-PDF Transcripts without leaving RB9.

They also come with free digital signatures in that you can apply as proxy for reporters. Both you and reporters can monitor your proxy usage.

If you require a different PDF format for archival reasons, you can create RB-PDF Transcripts in PDF/A formats, which include limited features.

Reference

- PDF
- PDF Transcript Preferences
- ASCII
- Condensed Transcript
- Word List
- Word Index
- PDF Transcript Stamps
- RB Digital Signature Proxy
- PDF/A

Step-by-step instructions

- Creating PDF transcripts

Condensed Transcript

RB9 Standard only

Condensed transcripts are exact replicas of full-sized transcripts but reduced in size so that 2 or 4 transcript pages fit on one sheet of paper.

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Setting word index & word list preferences

Creating PDF transcripts

RB9 Standard only

Generate RB-PDF Transcripts from "page image" ASCII files (ASCII files prepared in the image of a transcript) or any ASCII file which includes line numbers, page numbers and page breaks, as generated by most CAT systems and word processing applications.

NOTE: ASCII files must be properly formatted for RB9

RB9 can accept page-image ASCII files that include headers, footers, and timestamps. However, RB9 cannot accept ASCII files that contain binary code, such as borders, so borders must be removed before an ASCII transcript can be converted to PDF. You can re-apply borders to a transcript in the Select PDF Transcript Preference window (see Setting general PDF preferences).

1. Find ASCII file to convert

You can create RB-PDF Transcripts in either:

- **Production > PDF Transcripts**
  In the PDF Transcript window, to search for an ASCII file to convert to an RB-PDF Transcript, see Selecting transcripts to convert. Click the radio button of the desired ASCII file in the results grid.

- **Production > Turn In**

  If you do not have resources turn in jobs through RB Connect, you can convert an ASCII file to an RB-PDF Transcript when you upload it to the Witness repository of a job you are turning in. See Adding witnesses.

2. Customize settings

For the desired ASCII file, click:

- **Create PDF Transcript**
  (in PDF Transcripts window)

- **> Create PDF Transcript**
  (in Turn In's Witness repository)

The Select PDF Transcript Preferences window displays default preferences. To change preferences, see Selecting PDF transcript preferences.

3. Verify ASCII

After clicking **Next** in the Select PDF Transcript Preferences window, the Verify ASCII window appears. See Verifying ASCII.

4. **Finish PDF transcript**

    1. After RB9 verifies the ASCII file successfully, it converts the file into PDF transcripts. The PDF Transcript window displays the converted transcripts. In the PDF Transcript window, you can apply a stamp to the transcript (such as “Original” or ”Certified Copy”), automatically hyperlink exhibits to transcripts, attach digital signatures, set security restrictions on transcripts, and upload the files to your repository. See Finishing PDF transcripts.
    2. Click **Close.**

Reference

- RB-PDF Transcripts
- Turn In
- ASCII
- RB Connect
- PDF Transcript Preferences

Step-by-step instructions

- Setting general PDF preferences
- Selecting transcripts to convert
- Adding witnesses
- Selecting PDF transcript preferences
- Verifying ASCII
- Finishing PDF transcripts

Selecting PDF transcript preferences

RB9 Standard only

The Select PDF Transcript Preferences window displays preferences entered in your default PDF Transcript Preferences set. You can select a different set of preferences and/or edit individual preferences here for this transcript only.

Continued from Creating PDF transcripts or Creating master word lists.

1. Click:

   - **Create PDF Transcript**
     (in PDF Transcripts window)
   - **> Create PDF Transcript**
     (in Turn In's Witness repository)
   - **Next**
     (in the Set File Name and Merged Data window of Create Master Word List)

2. The Select PDF Transcript Preferences window displays preferences entered in your default PDF Transcript Preferences profile. If desired, select a different profile in the **Preference Name** drop-down. (Default values in preferences sets are entered in Setup > PDF Transcript Preferences.)

3. Update any preferences in the Select PDF Transcript Preferences window for the transcript selected, if desired:

   - **General** pane, see Setting general PDF preferences.
   - **Header & Footer** pane, see Setting RB-PDF Transcript header & footer preferences.
   - **Word Index & Word List** pane, see Setting word index & word list preferences.
   - **Condensed Transcript** pane, see Setting condensed transcript preferences.
   - **PDF File Properties** pane, see Setting RB-PDF Transcript file preferences.
   - **Cover Page & Errata Sheet** pane, see Setting cover page & errata sheet preferences.
   - **Digital Signature** pane, see Setting RB-PDF Transcript digital signature preferences.
   - **Exclude Word** pane, see Setting RB-PDF Transcript word exclusion preferences.

   NOTE: Preferences changes are for the current transcript only

   Changes made here do not affect the RB-PDF Transcript Preferences profile you

selected, and not all options in profile are editable here. To change the profile's preferences, see Setting global RB-PDF Transcript preferences.

4. Click **Next.** The Verify ASCII window appears. See Verifying ASCII.

Reference

- RB-PDF Transcripts
- PDF Transcript Preferences
- Create Master Word List

Step-by-step instructions

- Creating PDF transcripts
- Creating master word lists
- Setting global RB-PDF Transcript preferences
- Setting general PDF preferences
- Setting RB-PDF Transcript header & footer preferences
- Setting word index & word list preferences
- Setting condensed transcript preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences
- Setting RB-PDF Transcript word exclusion preferences
- Verifying ASCII

Verifying ASCII

RB9 Standard only

Before ASCII files can be converted into RB-PDF Transcripts, they must be verified by RB9. At this point, you can also edit the ASCII contents, download the file, and prepare a condensed transcript.

NOTE: ASCII files must be properly formatted for RB9

RB9 can accept page-image ASCII files that include headers, footers, and timestamps. However, RB9 cannot accept ASCII files that contain binary code, such as borders, so borders must be removed before an ASCII transcript can be converted to PDF. You can re-apply borders to a transcript in the Select PDF Transcript Preference window (see Setting general PDF preferences).

Continued from Creating PDF transcripts or Selecting PDF transcript preferences.

1. After clicking **Next** in the Select PDF Transcript Preferences window, the Verify ASCII window appears. Job and case information displayed is not editable. Review the ASCII file and make any corrections needed.

2. You can also:

   - **File Name**

     Download the ASCII file by clicking .

   - **Do not condense first X pages**

     If you are creating a condensed transcript, you can keep some pages at the start of the transcript at 100% by entering the number here.

   - **Do not condense last X pages**

     If you are creating a condensed transcript, you can keep some pages at the end of the transcript at 100% by entering the number here.

3. Click **Next.** RB9 verifies the ASCII file and creates the transcript(s) based on your preferences. (If RB9 discovers errors in the ASCII file, a popup appears describing the errors. Close the popup, fix the ASCII file and upload it again to create the PDF transcript.)

4. After RB9 verifies the ASCII file successfully, the PDF Transcript window displays the converted transcripts. In the PDF Transcript window, you can automatically hyperlink exhibits to transcripts, attach digital signatures, set security restrictions on transcripts, and upload the files to your repository. See Finishing PDF transcripts.

Reference

- RB-PDF Transcripts

PDF Transcript Preferences

- ASCII

Step-by-step instructions

- Setting general PDF preferences
- Creating PDF transcripts
- Selecting PDF transcript preferences
- Finishing PDF transcripts

Finishing PDF transcripts

After converting a transcript from ASCII to PDF, apply stamps to the transcripts, hyperlink exhibits to transcripts, attach digital signatures, set security restrictions, and upload the files to your repository.

Continued from Creating PDF transcripts or Verifying ASCII.

1. After RB9 verifies the ASCII file successfully and generates the PDF transcript(s), the PDF Transcript window displays the converted transcript(s) and optional generated files (word index and/or word list). To:

   - **Apply a stamp,** like "Original" or "Certified Copy", see Stamping transcripts.
   - **Automatically hyperlink exhibits to a transcript:**

     1. Click **Link Exhibits** next to a document you want to link exhibits to.
     2. A popup will appear asking if you want to link exhibits for both the full-sized and condensed transcripts at the same time.
        - Click **Yes** to have linked exhibits added to both transcripts.
        - Click **No** to link exhibits to the selected transcript only.
     3. To add the linked exhibits to the transcript(s), see Linking exhibits.

   - **Add your reporter's and/or agency's digital ID to the transcripts,** see Adding signatures to PDF transcripts.
   - **Duplicate the document,** click **> Duplicate.** The new document will appear in the list with "-Copy" appended to the file name.
   - **Rename the document,** click **> Rename.** In the **Rename** panel enter the preferred name in the ***New Name** field. The file extension cannot be changed. Click **OK.**
   - **Delete the document,** click **> Delete.** In the popup that appears, click **Yes.**
   - **Restrict transcript access and set permissions,** see Restricting access & setting permissions.

2. When you have finished preparing transcripts, check their boxes and click **Save to Repository.** The selected transcript(s) appear in the **New Repository** panel with default values filled in. To make changes to the values and/or upload the files to the Witness repository, see Uploading files to a repository.

3. Click **Close.**

Reference

- RB-PDF Transcripts
- ASCII

Step-by-step instructions

- Creating PDF transcripts
- Verifying ASCII
- Stamping transcripts
- Linking exhibits
- Adding signatures to PDF transcripts
- Restricting access & setting permissions
- Uploading files to a repository

Stamping transcripts

RB9 Standard only

Instead of using other software to stamp RB-PDF Transcripts, "certified" or "original," create your own stamps in RB9 and apply them without leaving the program. You can apply stamps to full-sized and condensed transcripts as well as word lists and word indexes if you create them as separate documents. You can apply as many stamps to a document as you want.

Continued from Finishing PDF transcripts.

1. In the PDF Transcript window, click **Add Stamp** next to the document you want to stamp.
2. In the **Add Stamps** panel, scroll or navigate to a page you want to stamp, then click **Add Stamp >** and select your stamp in the drop-down.
3. The selected stamp image appears, move your cursor on the document to where you want the stamp to appear and click to place it.
4. If you have more stamps to apply to the transcript, repeat steps 2 and 3.
5. Click **Save.**

Reference

- RB-PDF Transcripts
- PDF Transcript Stamps

Step-by-step instructions

- Creating transcript stamps
- Finishing PDF transcripts

Linking exhibits

RB9 Standard only

Create RB-PDF Transcripts with hyperlinked exhibits embedded inside the transcripts. You can link exhibits to PDF transcripts as you create the transcripts or add them later in the separate Link Exhibits function.

NOTE: Save time with pre-set linking patterns

Before using Link Exhibits, set up a default list of commonly used exhibit file names with their transcript aliases (the words and phrases used in transcripts to reference the exhibits) in Setup > Link Exhibits Patterns. (See Setting up alias patterns.)

Continued from Finishing PDF transcripts or Finding PDFs for linking exhibits.

1. After clicking **Link Exhibits** in either a PDF Transcript window or Link Exhibits window, the **Link Exhibits-[transcript].pdf** panel appears. Job and case information displayed is not editable. You can:

   - **File Name**

     Click to download the PDF version of the transcript you selected in the list.

   - **Do not link first X pages**

     Enter the number of pages at the start of the transcript you do not want hyperlinks on.

   - **Do not link last X pages**

     Enter the number of pages at the end of the transcript you do not want hyperlinks on.

2. Click **Next.**

3. To designate which exhibits will be hyperlinked in the transcripts and which words in the transcripts will used for the hyperlinks, see Using alias patterns.

4. Check the box in the **Aliases** panel header to select all of the patterns or check individual boxes to select them, then click **Next.**

5. When linking is finished, depending on which function you are in:

   - **PDF Transcripts**

     RB9 closes the panels, adds the hyperlinked transcript (denoted with -LE suffix on the file name), and grays out the **Link Exhibits** button in the PDF Transcript window.

   - **Link Exhibits**

     The **Sign & Save to Repository** panel appears. To digitally sign the transcript, see

Adding signatures to PDF transcripts. If not signing the transcript, click **Save.** RB9 closes the panels and lists the hyperlinked transcript in the Link Exhibits window (denoted with -LE suffix on the file name).

NOTE: Link exhibits before digitally signing transcripts

When using Link Exhibits, if you attempt to link exhibits to a transcript that has already been digitally signed, a popup will appear warning you that this is not allowed because it would invalidate the digital certificate.

TIP: Hyperlinked exhibits open in their original format

When your clients open the PDF, they can view any exhibit image in its native format by clicking a hyperlinked reference to it in the PDF. They do not have to maintain any additional files or file structure to access the exhibits.

Reference

- RB-PDF Transcripts
- Link Exhibits Patterns

Step-by-step instructions

- Setting up alias patterns
- Using alias patterns
- Adding signatures to PDF transcripts

Using alias patterns

RB9 Standard only

When linking exhibits to RB-PDF Transcripts or Transcript Packages, designate which words in the transcripts will be hyperlinked to the exhibits.

NOTE: Save time with pre-set linking patterns

Before linking exhibits, set up a default list of commonly used exhibit file names with their transcript aliases (the words and phrases used in transcripts to reference the exhibits) in Setup > Link Exhibits Patterns. (See Setting up alias patterns.)

Continued from Linking exhibits or Assembling transcript packages.

1. In the **Exhibits** panel/pane, all files that were uploaded to the witness repository during Turn In as **File Type:** Exhibit appear. (See Adding witnesses and Uploading files to a repository.) Check the box in the header to select all exhibits or check individual boxes in the list to select one or more exhibits.
2. In Link Exhibits, click **Next.**
3. In the **Aliases** panel/**Alias for Exhibit** pane, click **New > Choose from Alias Pattern** to use default alias patterns from Link Exhibits Patterns.
4. In the **Choose from Alias Patterns** panel, your default alias patterns are listed and checked by default. You can uncheck any that do not apply to the transcript.
5. Click **Save.** RB9 generates a list of all exhibit files with file names that match your alias patterns and their designated alias in the transcript.
6. If any of your exhibit files are not named in a way that matches your default alias patterns, you can add those patterns to the transcript. Select **New > Add New Alias,** and enter your new pattern in the **New Alias** panel. See Setting up alias patterns.
7. RB9 adds the new pattern(s) to the list of aliases patterns for the transcript.

NOTE: One-off patterns are not saved to your list

Patterns entered within a transcript (with **New > Add New Alias)** are used for that transcript only and not saved in your Link Exhibits Patterns database. If you will be using a pattern in other transcripts, save it in Setup > Link Exhibits Patterns so you don't have to enter it each time you want to use it. See Setting up alias patterns.

Reference

- RB-PDF Transcripts
- Transcript Packages
- Turn In
- Link Exhibits Patterns

Step-by-step instructions

- Setting up alias patterns
- Linking exhibits
- Assembling transcript packages
- Adding witnesses
- Uploading files to a repository
- Adding signatures to PDF transcripts

Adding signatures to PDF transcripts

If you use RB9's free digital signature system, ReporterBase Digital Signature Proxy, you can apply both reporters' digital IDs and a digital version of your agency's designated signer's wet signature to transcripts.

Continued from Finishing PDF transcripts.

1. To add your reporter's digital ID and/or agency's digital signature to an RB-PDF Transcript, click its **Add Signature** button in the PDF Transcript window.

2. In the **Add Signature** panel, the RB-PDF Transcript automatically opens to the last page of the file for you to apply signatures. If you prefer to sign a different page:

   - Drag on the side scroll bar to scroll to a different page.
   - Use the navigation arrows at the top of the transcript window to jump to the first page, page back and forth one page at a time, or jump back to the last page.
   - Enter a page number in the box between the navigation arrows to jump directly to a page.

3. To apply a copy of your agency's designated signer's wet signature to the transcript, click **Agency Sign.** (Use this only if the transcript is for a court proceeding that requires an agency signature on electronic transcripts.) Agency signatures are set up in System Preferences > Production > Signature Proxy.

   ### IMPORTANT: If using both signatures, apply agency's first

   If you are applying both an agency signature and a reporter's signature, you must apply the agency signature first. Reporter signatures contain a digital ID, which will alert readers if changes were made to the transcript after the signature was applied.

4. Position the signature where you want it to appear on the page and click to apply it.

5. To apply the reporter's signature/digital ID to the transcript, click **Resource Sign.** (Resource signatures are set up by the resources in RB9's Digital Signature Proxy Service.)

6. Position the signature where you want it to appear on the page and click to apply it. If you want to add
   additional instances of the signature, click **Yes** in the popup window that appears and repeat the procedure until you have added all the instances you want. Then click **No** in the popup window.

7. Click **Save.**

Reference

- RB-PDF Transcripts
- ReporterBase Digital Signature Proxy
- Signature Proxy preferences

Step-by-step instructions

- Finishing PDF transcripts

Restricting access & setting permissions

You can limit access to an RB-PDF Transcript by setting passwords and restricting certain features, such as printing and editing.

Continued from Finishing PDF transcripts.

1. To restrict transcript access and set permissions, check the transcript box(es) in the PDF Transcript window, then click **Set Security.**
2. In the Set Security popup, if you would like to restrict what recipients can do with the transcript, set a ***Change Permission Password** and define what it prohibits transcript readers from doing. Recipients don't need the password to open the document in *Adobe Acrobat.* They only need the password if they want to perform actions it prohibits:

   - ***Change Permission Password**

     Required. Enter a password in the field, then select which activities you will restrict users from performing by checking their box(es):

     - **Do not allow printing** – Recipients cannot print copies of the transcript.
     - **Do not allow changing** – Recipients cannot edit or otherwise alter the transcript.
     - **Do not allow copying content** – Recipients cannot copy any part of the transcript to use elsewhere.
     - **Do not allow adding and changing comments** – Recipients cannot make comments in the transcript or alter any existing comments in the transcript.

   - **PDF Transcript Open Password**

     If you want to require users to enter a password to open the transcript, check the **Require a password to open PDF Transcript** box, then enter a different password than the Change Permission Password in the ***PDF Transcript Open Password** field *(required).*

3. Click **OK.**

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Finishing PDF transcripts

Word List

RB9 Standard only

A **word list** shows the words appearing in a transcript; it can also include the number of times they appear in parentheses (word count). Each word on the list appears in the same way as it first appears in the document.

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Setting word index & word list preferences

Word Index

RB9 Standard only

A **word index** lists the words appearing in a transcript, along with the pages and lines they appear on.

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Setting word index & word list preferences

RB Digital Signature Proxy

ReporterBase Digital Signature Proxy (RB-DSP) is a free way to apply reporters' digital signatures to their RB-PDF Transcripts through the normal production process while maintaining the integrity of the signature.

Reference

- RB-PDF Transcripts
- ReporterBase.net

Step-by-step instructions

- Creating PDF transcripts

Creating master word lists

RB9 Standard only

Give reporters a master word list for jobs on on-going cases, instead of access to all of the previous transcripts for their preparation.

1. **Production > Create Master Word List**
2. In the **Search By** pane:
   - ***Case**

     Required. Click . See Looking up cases.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.
3. Click .
4. RB9 lists all of the ASCII files in the Witness repository that meet the specified search condition(s). Check the **Keep/Select** box in the header to select all files, or check individual boxes to select specific files.
5. Click **Create Master Word List.**
6. In the Set File Name and Merged Data window, the files selected are listed in the Select merged data grid, and a default file name appears:
   - ***File Name of Master Word List**

     Required. Default is Word List for [case name]. Edit if you use a different naming convention for word list files.
   - ***Select merged data**

     Required. Default is the first job listed. Click the radio button of a different job to use its RB9 data for the Master Word List's file properties, such as the title and keywords. See Setting RB-PDF Transcript file preferences.
7. Click **Next.**
8. In the Select PDF Transcript Preferences window, your default preferences appear. If you want to change any preferences, see Selecting PDF transcript preferences.
9. Click **Next.**
10. In the Save to Repository window, some fields are uneditable.

- ***File Type**

  Required. Select Word List in the drop-down.

- **File Name**

  Click to download the master word list to your device.

- **Access Type**

  Default is Resources and Office. If you have RB Connect, your resources can access the master word list online. You can change access to allow contacts access also, or restrict access to your office only.

- **Publish**

  If you have RB Connect and want resources or others to have access to this master word list, slide to Yes.

- **Description**

  Enter any text you want to appear with the file in RB9/RB Connect.

11. Click **Save.** The master word list uploads to the case-level repository and if published, resources and/or contacts can access it on your RB Connect.

12. The View Repository window appears. To view or update the master word list's details, see Viewing & updating repository file details.

IMPORTANT: Master Word List accepts ASCII File Type only

Only those files whose **File Type** was set to ASCII when uploaded to the repository will appear in Master Word List search results. (See Uploading files.) If you used a different name for this type of file, change the File Type's name to ASCII using the Merge To function in Setup > Lists > Repository. See Merging data.

TIP: Let reporters create their own Master Word Lists

If you and your reporters prefer, you can allow them to create their own word lists in RB Connect. Instead of full access to previous transcripts in an on-going case, they can only select transcripts, then RB Connect assembles the master word list for them. Give resources access in Connect > Connect Preferences > Resource-Accessibility.

Reference

- RB-PDF Transcripts
- Lookup panel
- Business Units
- ASCII
- PDF Transcript Preferences
- Repository lists
- RB Connect

- Resource-Accessibility preferences

Step-by-step instructions

- Looking up cases
- Setting RB-PDF Transcript file preferences
- Selecting PDF transcript preferences
- Viewing & updating repository file details
- Uploading files
- Merging data

Master Word List

A **Master Word List** compiles word lists from multiple RB-PDF Transcripts belonging to a case into a single word list.

Reference

- RB-PDF Transcripts
- Word List
- Create Master Word List

Step-by-step instructions

- Creating master word lists

Finding PDFs for linking exhibits

RB9 Standard only

If you did not link exhibits to a transcript when creating it, you can add them later in the Link Exhibits function.

NOTE: Save time with pre-set linking patterns

Before using Link Exhibits, set up a default list of commonly used exhibit file names with their transcript aliases (the words and phrases used in transcripts to reference the exhibits) in Setup > Link Exhibits Patterns. (See Setting up alias patterns.)

1. **Production > Linked Exhibits**
2. In the **Search By** pane, find a transcript to embed exhibits into. No specific search filter is required, but you must use at least one:
   - **Job No.**

     To find transcripts for one job, enter its job number.
   - **Witness**

     To find transcripts for one deponent, enter part of the deponent's name.
   - **Upload Date From/Upload Date To**

     To find transcripts by the dates they were uploaded, enter a date or date range. See Date Navigator.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to transcripts tied to specific BUs (see Lookup panel). BUs are set in Business Units.
3. RB9 lists all of the PDF transcripts that meet the specified search condition(s). To select a transcript for linking exhibits, click the transcript's radio button, then click **Link Exhibits.**
4. To link exhibits to the transcript, see Linking exhibits.

Reference

- Link Exhibits Patterns setup
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Creating PDF transcripts
- Setting up alias patterns
- Linking exhibits

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 :

   - **Job No.**

     Enter a job number to post invoice(s) for a single job.

   - **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.

   - **Show COD**

     No – Default. COD invoices cannot be posted or archived to the central repository, so they do not appear in default search results.

     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 (see Lookup panel). BUs are set in Business Units.

3. RB9 displays all unposted invoices that fit the search criteria in the Post Invoices results pane:

   - If a checkmark appears in **Need Calculation** column for an invoice, charges on the invoice have not been totaled. **To total charges,** see Calculating invoices.
   - **To view and edit invoice details,** click its hyperlink. See Viewing & sending single invoices.
   - **To review the invoice** before posting and sending, see Previewing invoices.
   - **To post invoices,** see Posting invoices.

NOTE: Color-coded results

Invoices listed in the Post Invoices results pane are color coded based on their job status. Job status colors are set in System Preferences > Calendar > Job Status Color.

Reference

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

Step-by-step instructions

- Working with COD invoices
- Calculating invoices
- Viewing & sending single invoices
- Previewing invoices
- Posting invoices

Posting invoices

You can post invoices as you create them in Turn In, or save time by posting multiple invoices at once with Post Invoices. You can also calculate invoices, preview invoices, and send/archive invoices in this function. Once posted, an invoice cannot be deleted.

Continued from Searching unposted invoices or Previewing invoices.

1. In the Post Invoices results pane, check the boxes of invoices you want to post.
2. Click:
   - **Post** – To only post the invoices.
   - **Post & Archive** – To post and archive the invoices at the same time.
3. If you have set the option in System Preferences to have RB9 check whether invoices have assigned Pay Rates or if their total pay amount is $0, a popup appears asking if you want to post the invoice as is. Click:
   - **No** – If you want to fix the pay rate issues. Return to the invoice in Turn In and update the invoices. See Applying rates.
   - **Yes** – If you do not need to alter the invoice.
4. RB9 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 in the results pane. See Sending & archiving invoices.
   - **No** – To post the invoices in RB9 without sending a copy to the clients (or archiving the invoices if you selected **Post** above). You can send and/or archive the invoice later.

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 Calculating invoices.
- Is COD and cannot be posted. See Working with COD invoices.
- Has zero billable charges. See Generating invoices.

Reference

- Invoice preferences
- COD invoices

Step-by-step instructions

- Searching unposted invoices
- Previewing invoices
- Applying rates
- Sending & archiving invoices
- Calculating invoices
- Working with COD invoices
- Generating invoices

Viewing & sending single invoices

View and update details in individual invoices. Not all information is editable. Send the original or current invoice to the client. You can also perform other functions, such as updating client and job information, uploading files to the repository, and exporting grids.

Continued from:

- *Searching unposted invoices*
- *Sending & archiving invoices*
- *Sending & archiving invoices in batches*
- *Searching for invoices*
- *Viewing client activity*
- Searching for payment histories
- *Searching pay overrides*

1. View & update 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), case, and job.

     - **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 window. 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, job, or case (see Updating firms, Updating contacts, Updating jobs, or Updating cases).

   - **Additional**

     Client-submitted information related to the job, such as e-billing data.

     - To enter or update miscellaneous billing information, including electronic billing information, see Adding optional billing information to invoices.

- **Orders**

  Witness and billed service item(s) information. Includes billed and outstanding amounts for taxes, fees, discounts, and other charges. *Not editable.*

- **Resource Pay**

  Information about what the resource was paid for, when, and how much in relation to this invoice. *Not editable.*

  - Click any active to view and edit details about the related Client Of or Sales Rep resource (see Updating resources).

- **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 RB9 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).
  - Email files to 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

1. To send the invoice from the 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.

2. Depending on your selection:

   - **If you chose an email option**
     Click **OK** in the **Options** popup to send the invoice immediately. If you want to use different options from the defaults, preview the email, edit, or attach files, see Emailing & texting from RB9. After sending the email, RB9 makes an entry recording the email in the Notes Log of the invoice.

   - **If you chose a print option**
     RB9 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 PDFs from RB9.)

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 Posting invoices.

3. ## Export/print grids

   You can export and print the grid in any pane that has a button (see Exporting & printing results).

Reference

- Notes Logs

Step-by-step instructions

- Searching unposted invoices
- Sending & archiving invoices
- Sending & archiving invoices in batches
- Searching for invoices
- Viewing client activity
- Searching for payment histories
- Searching pay overrides

- Setting up invoice messages
- Updating firms
- Updating contacts
- Updating jobs
- Updating cases
- Adding optional billing information to invoices
- Updating resources
- Using repositories
- Managing notes logs
- Updating file values quickly
- Emailing & texting from RB9
- Printing PDFs from RB9
- Posting invoices
- Exporting & printing results

Working with COD invoices

Send COD invoices to clients via email, RB 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 in Turn In

   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 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.

   - **Case**

     Case related to the COD invoice. See Looking up cases.

   - **Bill To Firm**

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

   - **Job No.**

     Job number related to the COD invoice.

   - **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). BUs are set in Business Units.

2. **Send invoice to client**

    1. RB9 displays all invoices that fit the search criteria. To preview and send a COD invoice, click its:

        - **> View.**
        - The 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 & texting from RB9.

        - **Publish the COD invoice on RB Connect**

            To allow the client to pay online, see Publishing COD invoices.

        - **Export/print the invoice**

            To send via traditional delivery methods or archive, see Printing invoices, statements & reports.

    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.**
- The 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.** RB9 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. 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

- RB Connect
- Turn In
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Adding billing information to invoices
- Purging COD invoices
- Looking up cases
- Looking up firms
- Emailing & texting from RB9
- Publishing COD invoices
- Printing invoices, statements & reports
- Entering additional firm information
- Entering payments
- Searching unposted invoices

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, enter a date (90 days in the past, for example) in **Invoice Date To,** then click .
3. RB9 displays all invoices that are older than the cut-off date. Copy the **Job No.** of an invoice you want to purge from the results grid.

2. Delete invoice

1. **Production > Turn In**
2. Paste the job number into the **Search By** pane's **Job No.** field, then click .
3. Click the hyperlinked **Job No.** in the search results or its **> Edit.**
4. In the Turn In–Job window, click the COD invoice's hyperlinked **Invoice No.**
5. In the **View 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

Send invoices to ordering clients and/or archive the invoices. Use the Send Invoices function if you want to send multiple invoices at once or archive invoices. Use either Send Invoices or Invoice Inquiry to send individual invoices.

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, "Do you want to send or archive invoices?" 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 invoices.
   - Click **Inquiry > Invoice Inquiry** and search for posted invoices. See Searching for invoices.
2. To send invoices:
   - From **Billing > Send Invoices,** see Sending & archiving invoices in batches. You can send 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, but not archive, invoices one at a time.

   In addition to sending the invoices, RB9 logs them into the Email Log *(RB9 Standard only)*.

Reference

- Email Log

Step-by-step instructions

- Posting invoices
- Posting invoices in Turn In
- Searching for invoices
- Sending & archiving invoices in batches
- Viewing & sending single invoices

Sending & archiving invoices in batches

Send multiple invoices to ordering clients or archive the invoices in 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 & archiving 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:
   - **Don't Send** – To select clients who do not receive invoices (for archiving invoices).
   - **Email** – To select clients who want emailed invoices, and have been set to Email or Print & Email in their Invoice Sending Method (see Entering additional contact information).
   - **Print** – To select clients who want invoices mailed or otherwise delivered, and have been set to Print or Print & Email in their Invoice Sending Method (see Entering additional contact information).
2. Click **Apply.** Then uncheck the box(es) for any invoice(s) you do not want to send this time/check the box(es) for any invoice(es) 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 RB9 repository.
4. Depending on your selection:
    - ### If you chose an email option
      Click **OK** in the **Options** popup to send the invoice(s) immediately. If you want to use different options from the defaults, preview the emails, edit, or attach files, see Emailing & texting from RB9. After sending the email, RB9 makes an entry recording the email in the Notes Log of the invoice(s).
    - ### If you chose a print option
      RB9 opens the invoice(s) 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 PDFs from RB9.)
    - ### If you chose the archive option
      RB9 archives the invoice(s). When it finishes, click **OK** in the popup that appears.

Reference

- Notes Log

Step-by-step instructions

- Sending & archiving invoices
- Searching for invoices
- Previewing invoices
- Viewing & sending single invoices
- Entering additional contact information)
- Emailing & texting from RB9
- Printing PDFs from RB99

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 job was billed. Enter a date or date range. See Date Navigator.
   - **Job No.**

     Enter a job number tied to the invoice.
   - **Case**

     Look up the case related to the invoice. See Looking up cases.
   - **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). BUs are set in Business Units.
3. RB9 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 drop-down.
  - If the contact is not listed, click **> New Contact** to add the contact to the firm. See Adding contacts to RB9.

- **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** drop-down *(required).* If contact is not listed, click ⊞ to add the contact to the firm. See Adding contacts.

- **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** drop-down *(required)*. If contact is not listed, click ⊞ to add the contact to the firm. See Adding contacts.

3. Click **Save.**

Reference

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

Step-by-step instructions

- Looking up cases
- Looking up firms
- Adding contacts to RB9

Exporting invoices in LEDES format

RB9 Standard only

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 in the Lookup Firm popup. See Looking up firms.
   - **Date Type**

     Invoice Date – Default. Date job 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 (see Date Navigator).
   - **Case**

     Click to look up and select a case (see Looking up cases).
   - **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). BUs are set in Business Units.
3. Click . All invoices that fit 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 the invoice, click **OK** and edit the invoice. See Entering electronic billing information.
3. RB9 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.

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

Step-by-step instructions

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

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.

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

RB9 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 RB9 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
- UTBMS codes
- ABA Litigation Code Set

Step-by-step instructions

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

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

Searching for 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 RB9-generated invoice number, enter the full invoice number.

   - ### Date Type
     - **Invoice Date** – Default. Date job was billed.
     - **Job Date** – Date job occurred.
     - **Post Date** – Date invoice was posted in RB9.
   - ### Date From/Date To

     Works with **Date Type.** Enter dates in the fields or click to select dates in the Date Navigator.

   - ### Job No.

     To find invoices for a job, enter the full job number.

- **Account Status**

  Invoice Inquiry only

  - **ALL** – Default. Displays both paid and unpaid invoices. Requires the use of at least one other filter.
  - **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). Requires the use of at least one other filter.

- **Case**

  Click to find invoices for a case (see Looking up cases).

- **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

  Works with **Amount From/Amount To.** To find invoices by:

  - **Invoice Amount** – Billed totals within a certain dollar amount range, enter numerals only.
  - **Balance** – Original invoice minus any payments amount.
  - **Balance+** – 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.

- **Amount From/Amount To**

  Invoice Inquiry only

  Works with **Amount Type.** To find invoices with totals within a certain dollar amount range, 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.

- **Ref. No. for Resource**

  Invoice Inquiry only

  Some reporters or agencies who work for other agencies have their own reference number for their invoices. Enter part of the reference number to search for invoices that include services from a resource that sent you an invoice.

- **Invoice Type**

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

- **Job Location City**

  Invoice Inquiry only

  Enter part of the city name where the billed job took place.

- **Job Location State**

  Invoice Inquiry only

  Default is ALL. Click to restrict the search to specific states, provinces, territories (see Lookup panel).

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. ## View results

   Click . RB9 lists all of the posted invoices that meet the specified search condition(s). Voided invoices appear in red.

   - To view an individual invoice's details and send the invoice to the client, click its hyperlinked **Invoice No.** See Viewing & sending single invoices.
   - 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.

Reference

- Date Navigator
- Lookup panel
- Invoice lists
- Business Units

Step-by-step instructions

- Sending & archiving invoices
- Customizing grids
- Looking up cases
- Viewing & sending single invoices
- Exporting & printing results
- Working with COD invoices
- Searching unposted invoices

Viewing client activity

Use Client Activity to find invoices for a specific client. 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** – Firm that pays invoices.
   - **Bill To Parent** – Parent company of firm paying invoices.
   - **Sold To** – Default. Firm that schedules jobs and pays invoices unless a separate Bill To firm has been designated.
   - **Sold To Parent** – Parent company of firm that schedules jobs.
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 drop-down.

- **Date Type**
  - **Invoice Date** – Default. Date job was billed.
  - **Job Date** – Date job occurred.
  - **Post Date** – Date invoice was posted in RB9.
- **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).

- **Case**

  Click to find invoices for a single case (see Looking up cases).

- **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). BUs are set in Business Units.

3. ## View invoices

   Click . RB9 lists all of the invoices that meet the specified search condition(s). To view an individual invoice's details, click its hyperlinked **Invoice No.**

   ### 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 box in the header to select all of the invoices listed, or check only the boxes next to the hyperlinked **Invoice No.** of specific invoices that you want to send to the client.
     2. Click **Send Invoices.**
     3. In the Email popup, RB9 compiles the invoices into a PDF file under Attachment(s). To send, see Composing emails & text messages.

   - **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, step 2.

   When you send invoices by email, RB9 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
- Date Navigator
- Business Units

Step-by-step instructions

- Looking up firms
- Looking up cases
- Searching in RB9
- Composing emails & text messages
- Viewing & sending single invoices

Summarizing client activity

RB9 Standard only

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** – Firm that pays invoices.
   - **Bill To Parent** – Parent company of firm paying invoices.
   - **Sold To** – Default. Firm that schedules jobs and pays invoices unless a separate Bill To firm has been designated.
   - **Sold To Parent** – Parent company of firm that schedules jobs.
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 drop-down.

- ### Date Type

  - **Invoice Date** – Default. Date job was billed.
  - **Job Date** – Date job occurred.
  - **Post Date** – Date invoice was posted in RB9.

- ### 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).
- **Case**

  Click to find invoices for a single case (see Looking up cases).
- **Show Quarterly**
  - **No** – Default. Billed amounts are shown by month and year only.
  - **Yes** – Billed amounts are shown by month, quarter, and year.
- **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). BUs are set in Business Units.

3. View summary

1. Click . RB9 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.
   - A single Service Group, click ▸ next to the Service Group. RB9 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, RB9 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 **> Excel.** See Exporting & printing results.

Reference

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

Step-by-step instructions

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

Viewing resource activity

Search for invoices that include a specific resource's billable services. Use filters to focus your search. For example, you can find the next pay amount or the total payable for any resource within seconds. See basic information about the invoices, such as invoice and pay amounts, or view complete details of individual invoices.

1. Identify the resource

1. **Inquiry > Resource Activity**
2. In the **Search By** pane, click next to ***Resource** field *(required).* See Looking up resources.

2. Restrict results

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

- **Account Status**
  - **ALL** – Default. Includes paid invoices as well as payables attributed to the selected resource.
  - **Next Pay** – Invoices that will be included in the resource's next paycheck.
  - **Payable** – All outstanding invoices that include payments to the selected resource.
- **Date Type**
  - **Invoice Date** – Default. Date job was billed.
  - **Job Date** – Date job occurred.
  - **Post Date** – Date invoice was posted in RB9.
- **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.
- **Party Type**
  - **Sold To** – Default. The party that ordered the job.
  - **Bill To** – The party that is paying for the job.

Firm

Leave blank unless you want to view the resource's activity for a particular firm. To select a firm, see Looking up firms.

- #### Contact

  Leave blank unless you want to view the resource's activity for a particular contact. See Looking up contacts.

- #### Case

  Leave blank unless you want to view the resource's activity for a particular case. To select a case, see Looking up cases.

- #### Business Units

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

3. ## View invoices

   Click . All invoices that fit the search criteria appear in the results pane. To view an individual invoice's details, click its hyperlinked **Invoice No.**

   #### NOTE: Save the results

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

Reference

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

Step-by-step instructions

- Looking up resources
- Looking up firms
- Looking up contacts
- Looking up cases
- Searching in RB9
- Exporting & printing results

Summarizing resource activity by service item

RB9 Standard only

Summarize a resource's billing and payroll amounts by service item. Find out what services are being provided by the resource. Compare totals by period to monitor your most productive resources. Resource Analysis includes sales and court taxes as separate line items so amounts match Client Activity reports.

1. Identify the resource

1. **Inquiry > Resource Analysis**
2. In the Resource Analysis window's **Search By** pane, click next to ***Resource** field *(required)* and choose the resource. (See Looking up resources).

2. Restrict results

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

- **Account Status**
  - **ALL** – Default.
  - **Next Pay** – To see only amounts that will be included in the resource's next paycheck.
  - **Payable** – To see all of the resource's outstanding payable amounts.
- **Date Type**
  - **Invoice Date** – Default. Date job was billed.
  - **Job Date** – Date job occurred.
  - **Post Date** – Date invoice was posted in RB9.
- **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.
- **Party Type**
  - **Bill To** – Firm that pays invoices.
  - **Bill To Parent** – Parent company of firm paying invoices.
  - **Sold To** – Default. Firm that schedules jobs and pays invoices unless a separate

Bill To firm has been designated.

- **Sold To Parent** – Parent company of firm that schedules jobs.

- **Firm**

  To see payables related to a single firm, click . See Looking up firms.

- **Contact**

  To see payables related to a single contact, click . See Looking up contacts.

- **Case**

  Click to see payables for a single case (see Looking up cases).

- **Include Void Invoices**

  - **No** – Default. No pay amounts tied to voided invoices will be included.
  - **Yes** – If you do not void resource pay when voiding invoices, this option will included pay amounts from voided invoices.

- **Show Quarterly**

  - **No** – Default. Payable amounts are shown by month and year only.
  - **Yes** – Payable amounts are shown by month, quarter, and year.

- **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). BUs are set in Business Units.

3. **View summary**

   1. Click . RB9 displays a snapshot of the resource's payables that meet the specified search condition(s), broken down by year in an interactive report.
   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. RB9 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, RB9 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 **> Excel.** See Exporting & printing results.

Reference

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

Step-by-step instructions

- Looking up resources
- Looking up firms
- Looking up contacts
- Looking up cases
- Using interactive reports
- Exporting & printing results

Searching witnesses

Search for deponents by name, job number, date, or case name. Get complete witness details, and enter new information about deponents.

1. Use search criteria

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

   - **Witness**

     Enter part of the witness name.

   - **Job No.**

     Enter the full RB9 job number.

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

     Enter scheduled job dates in the fields or click to select dates in the Date Navigator.

   - **Case**

     Click to find witnesses for a single case (see Looking up cases).

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to witnesses on jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. View results

Click . RB9 lists all of the witnesses that meet the specified search condition(s). Click a hyperlinked witness to view or update details (see Updating witnesses).

NOTE: Save the results

To export and save the results, click and select an export file type. RB9 automatically exports the file. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel

- Business Units

Step-by-step instructions

- Looking up cases
- Searching in RB9
- Exporting & printing results
- Updating witnesses

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 the client entered on the check.
     - **Post Date** – The date you posted the payment.
     - **Transaction Date** – The date you entered the payment into RB9.

   - **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 payments applicable to a single invoice.

   - **Payer**

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

   - **Made By/Description**

     To find payments 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 a job, click . (See Looking up firms).

3. Click . RB9 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 thecheck 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
- Date Navigator
- Lookup panel

Step-by-step instructions

Grouping results

- Customizing grids
- Searching in RB9
- Looking up firms
- Entering simple payments (one check per invoice)
- Viewing & sending single invoices
- Exporting & printing results

Searching pay overrides

Search historical data about Override Resource Pay payments separately from the resource pay total.

1. Use search criteria

1. **Inquiry > Override Resource Pay Inquiry**
2. In the **Search By** pane, no specific filter is required, but you must use at least one of the search filters:
   - **Date Type**
     - **Entered Date** – Default. Date override was entered in RB9.
     - **Invoice Date** – Date job was billed.
     - **Job Date** – Date job occurred.
     - **Pay Date** – Date pay was posted in RB9.
   - **Date From/Date To**

     Enter dates in the fields or click to select dates in the Date Navigator.
   - **Resource**

     Click to find a resource (see Looking up resources).
   - **Invoice No.**

     Enter the full RB9 invoice number.
   - **Job No.**

     Enter the full RB9 job number.

2. View results

Click . RB9 lists all of the payments that meet the specified search condition(s). Click a hyperlinked:

- **Invoice number** – To view or update invoice details. Not all details are editable. See Viewing & sending single invoices.
- **Job number** – To view or update the associated job's details. Not all details are editable. See Updating jobs.

NOTE: Save the results

To export and save the results, click and select an export file type. RB9 automatically exports the file. See Exporting & printing results.

Reference

- Date Navigator
- Lookup panel

Step-by-step instructions

- Searching in RB9
- Looking up resources
- Viewing & sending single invoices
- Updating jobs
- Exporting & printing results

Celebrating client anniversaries

RB9 Standard only

Print envelopes and labels for cards and gifts to send to clients celebrating upcoming birthdays and other anniversaries. Enter dates in their profiles first (see Remembering important client dates).

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 Of**

     To restrict anniversaries shown to only those of clients who are tied to a particular reporter or other resource, click (see Looking up resources).

   - **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 resources).

   - **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 . RB9 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 and labels

   1. Check the box in the header to select all of the contacts listed, or check only the box(es) next to the hyperlinked **Contact** of specific client(s) that you want to send mail to.
   2. Click **Print Envelopes and Labels.** See Printing envelopes and labels.

Reference

- Lookup Panel
- Others lists
- Client Of
- Sales Rep

Step-by-step instructions

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

Knowing your market

RB9 Standard only

Evaluate clients on a firm level or by contact in terms of jobs 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 jobs scheduled during a particular time period, see Finding inactive clients.
- With the most jobs scheduled during a particular time period, see Finding most-scheduled clients.
- With no billed jobs 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.

NOTE: Evaluate your business by resource

If you want to see how your business is doing from the resource side, such as who is your highest paid resource or who hasn't worked in a while, see Evaluating your business by resource.

Step-by-step instructions

- Finding new clients
- Finding inactive clients
- Finding most-scheduled clients
- Finding non-invoiced clients
- Finding highest-invoiced clients

Finding new clients

RB9 Standard only

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** drop-down.
3. Leave **Type** as New, the default.

2. Update required information

***Entered From/*Entered To** *(required)* – Default is current month to date. To view new clients within a different time period, change the date range (see 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

  Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. View clients & print envelopes/labels

Click . All new clients that fit 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 next to **Firm Name/Contact** in the header to select all results, or check the box(es) next to individual client(s) to select specific results.

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

Step-by-step instructions

- Knowing your market
- Finding inactive clients
- Finding most-scheduled clients
- Finding non-invoiced clients
- Finding highest-invoiced clients
- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results

Finding inactive clients

RB9 Standard only

Find clients that had no scheduled jobs during a particular time period.

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** drop-down.
3. Select No Calendar in **Type** drop-down.

2. Update required information

***Entered From/*Entered To** *(required)* default is current year to date. To view clients within a different time period, change the date range (see 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). BUs are set in Business Units.

- **Notification Type**

  Contacts only

  Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. View clients & print envelopes/labels

Click . All clients that fit 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 next to **Firm Name/Contact** in the header to select all results, or check the box(es) next to individual client(s) to select specific results.
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

Step-by-step instructions

- Knowing your market
- Finding new clients
- Finding most-scheduled clients
- Finding non-invoiced clients
- Finding highest-invoiced clients
- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results

Finding most-scheduled clients

RB9 Standard only

Find clients that had the most scheduled jobs during a particular time period. You can search by ordering client or scheduled by (typically secretaries and paralegals, not attorneys). 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** drop-down.
3. In **Type** drop-down, select:
   - **Top N Calendar by Ordering** – For ordering clients that had the most jobs scheduled in the time period.
   - **Top N Calendar by Scheduled** *(contacts only)* – For scheduling contacts who scheduled the most jobs in the time period.

2. Update required information

***Scheduled Date From/*Scheduled Date To** *(required)* – Default is current month to date. To view clients within a different time period, change the date range (see Date Navigator).

3. Restrict results

With Top N Calendar by Ordering/Scheduling 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 jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

- **Notification Type**

  Contacts only
  Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. **View clients & print envelopes/labels**

   Click . All clients that fit 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 next to **Firm Name/Contact** in the header to select all results, or check the box(es) next to individual client(s) to select specific results.
     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

Step-by-step instructions

- Knowing your market
- Finding new clients
- Finding inactive clients
- 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

RB9 Standard only

Find clients that had no billed jobs 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** drop-down.
3. Select No Revenue in **Type** drop-down.

2. Update required information

***Invoice Post Date From/*Invoice Post Date To** *(required)* default is current month to date. To view clients within a different time period, change date range (see 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). BUs are set in Business Units.

- **Notification Type**

  Contacts only

  Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. View clients & print envelopes/labels

Click . All clients that fit 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 next to **Firm Name/Contact** in the header to select all results, or check the box(es) next to individual client(s) to select specific results.
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

Step-by-step instructions

- Knowing your market
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- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results

Finding highest-invoiced clients

RB9 Standard only

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** drop-down.
3. Select Top N Revenue in **Type** drop-down.

2. Update required information

***Invoice Post Date From/*Invoice Post Date To** *(required)* default is current month to date. To view clients within a different time period, change the date range (see 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 jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

Notification Type

Contacts only

Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. ## View clients & print envelopes/labels

   Click . All clients that fit 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 next to **Firm Name/Contact** in the header to select all results, or check the box(es) next to individual client(s) to select specific results.
     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

Step-by-step instructions

- Knowing your market
- Finding new clients
- Finding inactive clients
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- Managing notification emails
- Updating firms
- Updating contacts
- Printing envelopes and labels
- Exporting & printing results

Evaluating your business by resource

RB9 Standard only

Evaluate resources in a variety of ways, including how many jobs they took and how much pay and commissions they earned. Print envelopes and labels from inquiry results. View individual resources' details. Export results to save and create your own reports.

To find resources:

- Added during a particular time period, see Finding new resources.
- With no assignments during a particular time period, see Finding non-assigned resources.
- With the most assignments during a particular time period, see Finding your busiest resources.
- With no income during a particular time period, see Finding zero-pay resources.
- With the most income during a particular time period, see Finding highest compensated resources.
- That are sales representatives or Client Of resources with the most commissions during a particular time period, see Finding highest commissioned resources.

NOTE: Evaluate your business by client

If you want to see how your business is doing from the client side, such as who is scheduling the most jobs with you or who you haven't heard from in a while, see Knowing your market.

Reference

- Client Of
- Sales Rep

Step-by-step instructions

- Finding new resources
- Finding non-assigned resources
- Finding your busiest resources
- Finding zero-pay resources
- Finding highest compensated resources
- Finding highest commissioned resources
- Knowing your market

Finding new resources

RB9 Standard only

Find resources added during a particular time period. Review each new resource's details to check for errors. Print envelopes and labels for sending welcome cards or new employee packages. Export results to save and create reports.

1. Select resource status

1. **Inquiry > Marketing Inquiry**
2. Select Resources in the **Category** drop-down.
3. Leave **Type** as New, the default.

2. Update required information

***Entered From/*Entered To** *(required)* default is current month to date. To view new resources within a different time period, change date range (see Date Navigator).

3. Restrict results

Notification Type – Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. View resources & print envelopes/labels

Click . All new resources that fit the search criteria appear in the results pane.

- **To view/update a resource's details,** click their hyperlinked **Resource** listing. See Updating resources.
- **To print envelopes/labels:**
  1. Check the box next to **Resource** in the header to select all results, or check the box(es) next to individual resource(s) to select specific results.
  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

Step-by-step instructions

- Evaluating your business by resource
- Finding non-assigned resources
- Finding your busiest resources
- Finding zero-pay resources
- Finding highest compensated resources
- Finding highest commissioned resources
- Managing notification emails
- Updating resources
- Printing envelopes and labels
- Exporting & printing results

Finding non-assigned resources

RB9 Standard only

Find resources that had no assignments during a particular time period. View resource details. Print envelopes and labels. Export results to save and create reports.

1. Select resource status

1. **Inquiry > Marketing Inquiry**
2. Select Resources in the **Category** drop-down.
3. Select No Assigned in **Type** drop-down.

2. Update required information

***Job Date From/*Job Date To** *(required)* default is current month to date. To view resources within a different time period, change date range (see Date Navigator).

3. Restrict results

- **Business Units**
  Default is ALL. Click to restrict the search to specific profit centers (see Lookup panel). BUs are set in Business Units.
- **Notification Type**
  Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. View resources & print envelopes/labels

Click . All resources that fit the search criteria appear in the results pane.

- **To view/update a resource's details,** click their hyperlinked **Resource** listing. See Updating resources.
- **To print envelopes/labels:**
  1. Check the box next to **Resource** in the header to select all results, or check the box(es) next to individual resource(s) to select specific results.
  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

Step-by-step instructions

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- Finding highest commissioned resources
- Managing notification emails
- Updating resources
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- Exporting & printing results

Finding your busiest resources

RB9 Standard only

Find resources that had the most assignments during a particular time period.

1. Select resource status

1. **Inquiry > Marketing Inquiry**
2. Select Resources in **Category** drop-down.
3. Select Top N Assigned in **Type** drop-down.

2. Update required information

***Job Date From/*Job Date To** *(required)* default is current month to date. To view resources on jobs within a different time period, change the date range (see Date Navigator).

3. Restrict results

With Top N Assigned selected in **Type,** use the additional search filters to narrow the results returned, if desired:

- **Top N**
  Default is 100 resources. To search for a different amount of resources, update the number in this field.
- **Business Units**
  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.
- **Notification Type**
  Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. View resources & print envelopes/labels

Click . All resources that fit the search criteria appear in the results pane.

- **To view/update a resource's details,** click their hyperlinked **Resource** listing. See Updating resources.
- **To print envelopes/labels:**

1. Check the box next to **Resource** in the header to select all results, or check the box(es) next to individual resource(s) to select specific results.
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

Step-by-step instructions

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- Finding highest commissioned resources
- Managing notification emails
- Updating resources
- Printing envelopes and labels
- Exporting & printing results

Finding zero-pay resources

RB9 Standard only

Find resources that had no payable amounts during a particular time period.

1. Select resource status

1. **Inquiry > Marketing Inquiry**
2. Select Resources in **Category** drop-down.
3. Select No Payroll in **Type** drop-down.

2. Update required information

***Pay Date From/*Pay Date To** *(required)* default is current month to date. To view resources within a different time period, change date range (see Date Navigator).

3. Restrict results

Notification Type – Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. View resources & print envelopes/labels

Click . All resources that fit the search criteria appear in the results pane.

- **To view/update a resource's details,** click their hyperlinked **Resource** listing. See Updating resources.
- **To print envelopes/labels:**
  1. Check the box next to **Resource** in the header to select all results, or check the box(es) next to individual resource(s) to select specific results.
  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

Step-by-step instructions

- Evaluating your business by resource

- Finding new resources
- Finding your busiest resources
- Finding highest compensated resources
- Finding highest commissioned resources
- Managing notification emails
- Updating resources
- Printing envelopes and labels
- Exporting & printing results

Finding highest compensated resources

RB9 Standard only

Find resources that had the highest payables during a particular time period.

1. Select resource status

1. **Inquiry > Marketing Inquiry**
2. Select Resources in the **Category** drop-down.
3. Select Top N Payroll in **Type** drop-down.

2. Update required information

***Pay Date From/*Pay Date To** *(required)* default is current month to date. To view resources within a different time period, change the date range (see Date Navigator).

3. Restrict results

- **Top N**
  Default is 100 resources. To search for a different amount of resources, update the number in this field.
- **Notification Type**
  Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. View resources & print envelopes/labels

Click . All resources that fit the search criteria appear in the results pane.

- **To view/update a resource's details,** click their hyperlinked **Resource** listing. See Updating resources.
- **To print envelopes/labels:**
  1. Check the box next to **Resource** in the header to select all results, or check the box(es) next to individual resource(s) to select specific results.
  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

Step-by-step instructions

- Evaluating your business by resource
- Finding new resources
- Finding non-assigned resources
- Finding your busiest resources
- Finding zero-pay resources
- Finding highest commissioned resources
- Managing notification emails
- Updating resources
- Printing envelopes and labels
- Exporting & printing results

Finding highest commissioned resources

RB9 Standard only

Find resources that had the highest commissions from their own clients (AKA Client Of resources) or sales representatives that had the highest commissions during a particular time period. View resource details. Print envelopes and labels. Export results to save and create reports.

1. Select resource status

1. **Inquiry > Marketing Inquiry**
2. Select Resources in **Category** drop-down.
3. In **Type** drop-down, select:
   - **Top N Client of Commission**
     To get results for resources that have their own clients.
   - **Top N Sales Rep Commission**
     To get results for sales representatives.

2. Update required information

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

3. Restrict results

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

- **Top N**
  Default is 100 Client Of resources/sales reps. To search for a different amount of resources, 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 jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

- **Notification Type**
  Default is Main. Click to select one or more email categories to search by. See Managing notification emails.

4. ## View resources & print envelopes/labels

   Click . All Client Of resources/sales reps that fit the search criteria appear in the results pane.

   - **To view/update a resource's details,** click their hyperlinked **Resource** listing. See Updating resources.
   - **To print envelopes/labels:**
     1. Check the box next to **Resource** in the header to select all results, or check the box(es) next to individual(s) to select specific results.
     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

- Client Of
- Sales Rep
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Evaluating your business by resource
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- Printing envelopes and labels
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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. RB9 can handle an unlimited number of invoices paid by one check.

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

NOTE: Payments through RB Connect just need to be posted

If clients pay online through RB Connect, you do not have to enter payment information manually. RB9 automatically enters the payment, including the processing fee if you have set up processing fees in RB9. Online payments will appear in the Receive Payments results grid, so you can review, edit, and post the payment. See Posting payments.

Reference

- RB Connect

Step-by-step instructions

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

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 One Check One Invoice, the New Payment window opens. **Lookup By** is Invoice No. by default. To find invoice by:

   - **Invoice number** – Enter the number of the invoice you want to apply the payment to in the field.
   - **Job number** – Select Job No. in the **Lookup By** drop-down, then enter the number of the invoiced job you want to apply the payment to in the field.

   ### TIP: Use multi-invoice option if you don't know the invoice/job number

   If you don't have the invoice or job 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.** – RB9 automatically fills in the invoice details in the **Invoice Info** pane.
   - **Job No.** – The **Invoices** panel opens with any invoices associated with the job listed. Click the hyperlinked invoice number that the payment is for, and RB9 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.

   ### 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 RB Connect. Must set up an account with an RB9-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 are set up in Lists > Accounting.

  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 (see Date Navigator).

- **Payer**

  The firm that was sent the invoice (Bill To). Click the ▽ to view/update the firm or select a different firm. See Looking up firms.

  NOTE: Third-party payer?

  If the check is from a third party, remove the payer 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 check amount is different, enter the check amount.

- **Check Date**

  The actual date on the check

- **Account No.**

  A payment credits the Accounts Receivable account. Select an account to be debited in the drop-down. The default is your Checking account. (Checking account is set in Business Unit Accounts. See Setting up business units.)

- **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.

   - **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.

   - **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
- RB Connect
- PayPal
- Contact-Account Activity preferences
- Accounting lists
- Date Navigator
- Business Units
- Receivable Transaction Inquiry
- Discount
- Overpayment
- Surcharge
- Debits and credits

Step-by-step instructions

- Entering payment covering multiple invoices
- Working with COD invoices
- Applying retainers
- Looking up firms
- Setting up business units
- Searching for payment histories
- Posting payments

Entering payment covering multiple invoices

Apply a payment to multiple outstanding invoices. RB9 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 One Check Multiple Invoices, the New Payment window opens. Enter or make selections:

   - **Payment Type**

     - **Check** – Default.
     - **Online Payment** – For payments through RB Connect. Must set up an account with an RB9-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 or Credit Card. Payment types are set up in Lists > Accounting.

     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 enter the transaction. Default is today. Change date, if desired (see Date Navigator).

   - **Payer**

     The firm that was sent the invoice (Bill To). Click the to select the Bill To firm. See Looking up firms.

     NOTE: Third-party payer?

     If the check is from a third party, leave 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 check amount.

- **Check Date**

  The actual date on the check

- **Account No.**

  A payment credits the Accounts Receivable account. Select an account to be debited in the drop-down. The default is your Checking account. (Checking account is set in Business Unit Accounts. See Setting up business units.)

- **Made By**

  The issuer of the check, if different from the Bill To firm.

2. Click **Save.**

2. Apply payment & post

1. Apply payment to invoices. See Applying payments to invoices.
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
- RB Connect
- PayPal
- Contact-Account Activity preferences
- Accounting lists
- Date Navigator
- Business Units

Step-by-step instructions

- Applying retainers
- Looking up firms
- Setting up business units
- 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

Overpayment

If a client sends you a check for more than is owed, the excess amount should be entered as an **overpayment**. RB9 posts all overpayments to the Refund account since they are liabilities to be refunded in the future.

Reference

- Refund

Step-by-step instructions

- Entering payments
- Recording refunds made

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.

Step-by-step instructions

- Entering payments

Applying retainers

After you perform work for a case you're holding a retainer for, 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** drop-down.
2. ***Transaction Date** *(required)* defaults to today. Change date, if desired (see 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

- Case
- Retainers
- Date Navigator

Step-by-step instructions

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

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 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 checks you or someone else entered,** click next to the **Created By** field. In the Lookup User popup, find the name of the user (see Lookup panel).
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.**
5. In the View Payment window, any invoices that have already been selected to be paid with this transaction are listed in **Applied Invoice(s).** Click **Edit** in the window header.

   ### 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.
   - **Balance the transaction with an existing invoice,** check the invoice's box, then click to remove the invoice from the applied list before clicking .

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.

TIP: Use shortcuts to save time

Instead of clicking a transaction's hyperlinked **Amount** in the main window's results grid, click the transaction's >

- **View** – To open the transaction in its View window.
- **Edit** – To open the transaction in its Edit window.
- **Delete** – To delete the transaction. In the popup that appears, click **Yes.**

Reference

- Debits and credits
- Lookup panel

Step-by-step instructions

- Entering payments
- Applying retainers
- Exporting & printing results
- Applying payments to invoices
- Posting payments

Applying payments to invoices

Apply checks and retainers to outstanding invoices.

Continued from Entering payment covering multiple invoices, Applying retainers, and 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**
     Click ▽ **> Lookup Firm.** See Looking up firms.
   - **Invoice No.**
     Enter the entire invoice number.
   - **Job No.**
     Enter the entire job number.
   - **Invoice Amount**
     Enter a dollar amount range in the 2 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 a hyperlinked **Invoice No.** that you want to apply the payment/retainer to. A drop-down 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.

- **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

Reference

- RB Connect
- Accounting lists
- Discount
- Overpayment
- 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
- Setting up business units
- 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 and 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.
   - **> 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.** RB9 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.

Reference

- RB Connect
- Accounting lists
- Discount
- Overpayment
- Debits and credits
- Send Payment Receipts

Step-by-step instructions

- Applying retainers
- Balancing transactions to post
- Entering simple payments (one check per invoice)
- Entering payments covering multiple invoices
- Sending receipts for payments

Debit Memo

A **debit memo** increases the balance of an invoice.

Step-by-step instructions

- Issuing debit memos

Issuing credit memos

Use a credit memo to reduce the balance of an invoice.

1. **Receivables > Enter Other Transactions**
2. In Enter Other Transactions window, click **New > Credit Memo.**
3. In the New Credit Memo window's **Lookup Invoice No.,** type the invoice number and click .
4. 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.
5. Enter the following information in the **Credit Memo** pane:
   - ***Transaction Date**

     Enter the credit date. The default is today's date.
   - ***Amount**

     Enter 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. Select an account to be debited in the drop-down.
   - **Debit Client of Commission**

     Slide to Yes to show this credit memo on the Sales Commission Report for the resource so that you can adjust (decrease) the resource's commission.
   - **Debit Sales Rep Commission**

     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**

     Enter the reason for the credit.
6. Click **Save >**
   - **Save & New:** To create another credit memo.
   - **Save & Close:** If you have no more credit memos to add at this time.
7. 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).

8. RB9 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.
- 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

- Client Of
- Sales Rep

Step-by-step instructions

- 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.

1. **Receivables > Enter Other Transactions**
2. In Enter Other Transactions window, click **New > Debit Memo.**
3. In the New Debit Memo window's **Lookup Invoice No.,** type the invoice number and click .
4. 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.
5. Enter the following information in the **Debit Memo** pane:

   - ***Transaction Date**

     Enter the debit date. The default is today's date.

   - ***Amount**

     Enter the 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**

     Enter the late charge amount that is being debited. (If field is grayed out, no late charge payment was previously paid.)

   - **Debit Finance Charge**

     Enter the finance charge 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. Select an account to be credited in the drop-down.

   - **Credit Client of Commission**

     Slide to Yes to show this debit memo on the Sales Commission Report for the resource so that you can adjust (increase) the resource's commission.

   - **Credit Sales Rep Commission**

     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**
  Enter the reason for the debit. The default is "Returned check."

6. Click **Save >**
   - **Save & New:** To create another debit memo.
   - **Save & Close:** If you have no more debit memos to add at this time.
7. 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).
8. RB9 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.
- If the invoice has a full balance, you cannot issue a debit memo.

Reference

- Client Of
- Sales Rep

Duplicate Payment

A **duplicate payment** is a liability on your books even though you deposit the funds into your checking account. RB9 posts it as a liability to the Refund account.

Step-by-step instructions

- Entering duplicate payments

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 RB9 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

If you issue a refund check for a duplicate payment, be sure to note the refund in RB9, 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 RB9 so that the Payment Transactions log is complete.

Step-by-step instructions

- Recording refunds made

Recording refunds made

Since RB9 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 RB9 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 payments
- Overpayment
- Retainers

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 drop-down.
     - **A refund credits the Checking account.** Select an account to be debited in the drop-down.
   - **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. RB9 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
- Applying retainers

Entering duplicate payments & refunds covering multiple invoices

Apply a duplicate payment or refund to multiple invoices. RB9 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.
   - **Account No.**
     - **A duplicate payment debits the Checking account.** Select an account to be credited in the drop-down.
     - **A refund credits the Checking account.** Select an account to be debited in the drop-down.
   - **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. RB9 posts the transaction(s). When finished, click **OK** in the popup that appears.

NOTE: Be sure to post transactions

All daily transactions (such as invoices, payments, refunds, 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

- 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 or a resource 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.

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.

1. **Receivables > Enter Other Transactions**
2. In Enter Other Transactions window, click **New > Misc. Receipt.**
3. Enter the following information in the **Misc. Receipt** pane:
   - ***Transaction Date**

     Date you received the receipt. Default is today.
   - ***Amount**

     Miscellaneous receipt amount
   - **Account No.**

     A miscellaneous receipt debits the Checking account. Select an account to be credited in the drop-down.
   - **Check No.**

     Check number
   - **Check Date**

     Actual date on the check
   - **Job No.**

     Job number associated with the payment, if applicable
   - **Business Unit**

     Company profit center associated with the payment
   - **Remarks**

     Reason for the receipt
4. Click **Save >**
   - **Save & New:** To enter another miscellaneous receipt.
   - **Save & Close:** If you have no more miscellaneous receipts to add at this time.
5. 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).

6. RB9 posts the transaction(s). When finished, click **OK** in the popup that appears.

Reference

- Retainer
- Business Units

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.

Step-by-step instructions

- Voiding invoices

Voiding invoices

If a customer returns a product, its invoice must be voided. If a job is billed incorrectly, the invoice(s) should be voided before the job is billed again.

1. **Receivables > Enter Other Transactions**
2. In Enter Other Transactions window, click **New > Void.**
3. In the New Void window's **Lookup Invoice No.,** type the invoice number and click .
4. 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.
5. In the **Void** pane, **Transaction Date** is today and cannot be edited. 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 Client of Commission**

     By default, the resource commission will also be voided. Slide to Yes not to void the commission.

   - **Not to void Sales Rep Commission**

     By default, the sales rep commission will also be voided. Slide to Yes not to void the commission.

   - **Not to void Resource Pay**

     By default, the resource pay will also be voided. Slide to Yes not to void the pay. The resource will be paid for the invoice and you can also make adjustments to the resource's pay on the invoice. See Correcting resource pay.

     If the resource's pay should be voided when the invoice is voided but the resource has already been paid, enter a pay adjustment to deduct the amount paid from the next payroll. (See Entering pay adjustments.)

   - **Remarks**

     Reason for the void.

6. Click **Save >**

Save & New: To void another invoice.

- **Save & Close:** If you have no more invoices to void at this time.

7. 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(s).
8. RB9 posts the transaction(s). When finished, 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.

Reference

- Client Of
- Sales Rep

Step-by-step instructions

- Correcting resource pay
- Entering pay adjustments

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.

1. **Receivables > Enter Other Transactions**
2. In Enter Other Transactions window, click **New > Write-off.**
3. In the New Write-off window's **Lookup Invoice No.,** type the invoice number and click .
4. 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.
5. 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. Select an account to be debited in the drop-down.
   - **Void Client of Commission**

     By default, the resource commission will not be voided.Slide to Yes to void the commission.
   - **Void Sales Rep Commission**

     By default, the sales rep commission will not be voided. Slide to Yes to void the commission.
   - **Remarks**

     Enter the reason for the write-off. The default is "Uncollectible bad debt."
6. Click **Save >**
   - **Save & New:** To write off another invoice.
   - **Save & Close:** If you have no more write-offs to add at this time.
7. 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).

8. RB9 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.

NOTE: Write-offs do not change resource pay

When an invoice is written off, the resource's regular pay is not affected.

Reference

- Client Of
- Sales Rep

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 unposted transaction, edit some transaction details, delete transactions, and post transactions.

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.
   - **Delete an unposted transaction,** click its **> Delete** or click its hyperlinked **Transaction Amount** then click **Delete** in its View window.
3. Check the box in the header to select all transactions listed or check the box(es) of specific unposted transaction(s) to select them.
4. Click **Post** to post the transaction(s).
5. RB9 posts the transaction(s). When finished, click **OK** in the popup that appears.

NOTE: You can manually refresh the list

RB9 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

- 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
- Entering miscellaneous receipts
- Recording refunds made
- 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**

     The staff member who posted the payment. Click to select a user name from the **Lookup User** popup. All users are listed in the panel by default. To restrict the results, enter part of a user's name in **Search Criteria** and click . To select a user, click their hyperlinked name.

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 in the header to select all payments or check the box(es) of specific payment(s) you want to acknowledge (use Shift + Click to select or deselect a continguous range of boxes), then click **Send.**

5. Click **OK** in the **Options** popup to send the receipt email(s) immediately. If you want to use different options from the defaults, preview the email(s), edit, or attach files, see Emailing & texting from RB9. After sending the email, RB9 notes the result in the **Results** column of the Send Payment Receipts grid, and records the email in Tools > Email Log.

Reference

- Date Navigator
- Email Log

Step-by-step instructions

- Posting payments
- Exporting & printing results
- Emailing & texting from RB9
- Viewing email logs

Providing resources with billing reports

RB9 Standard only

Generate Resource Billings Reports to provide resources with their own reports of what work they completed has been posted and what amounts they can expect from that work. The report lists each service item and its pay amount, grouped and subtotaled by resource, one resource per page.

1. **Receivables > Resource Billings Report**
2. In the **Search By** pane, you must use the date search filters:
   - ***Post Date From/*Post Date To**

     Required. Date(s) invoices were posted. Default is today. Change the range if desired. See Date Navigator.
   - **Resource**

     To restrict search to a single resource, see Looking up resources.
   - **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). BUs are set in Business Units.
3. Click . RB9 lists all of the invoices that meet the specified search condition(s) as a report, one resource per page. 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
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up resources
- Printing invoices, statements & reports

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 Registers**
2. In the **Search By** pane, make selections as needed:
   - **Posted**

     Yes – Default. Generally, you run daily registers at the end of the day after posting.

     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. 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). BUs are set in Business Units.
3. Click . RB9 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
- Invoice lists
- Business Units

Step-by-step instructions

- Printing invoices, statements & reports

Keeping track of accounts receivable balances

RB9 Standard only

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). BUs are set in Business Units.
3. Click . RB9 lists all of the dates transactions were posted 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 posted transactions are broken out and grouped according to type.
5. To export and save 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

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 RB9 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 RB9 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

Generating finance charges automatically

If you have set up finance charge rates in clients' firm records, you can have RB9 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. RB9 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 **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 the 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). BUs are set in Business Units.

2. Click . RB9 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.

     Click **Generate > Only checked invoices.**

4. When RB9 finishes generating the charges, it removes the invoice(s) from the results pane and an Operation Successful box 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.

Reference

- Firms

- Lookup panel
- Business Units

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

Generating finance charges manually

If you have an invoice that is overdue, but you have not had RB9 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.

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 . RB9 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 .
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

- Generating finance charges
- Entering additional firm information
- 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 Charges**
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 find finance charges for a particular client, click . See Looking up firms. Otherwise, leave blank to find finance charges for all clients.
   - **Invoice No.**

     Enter the 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 (see Lookup panel). BUs are set in Business Units.
3. Click . RB9 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.

     Click **Clear > Only checked invoices.**
5. When RB9 finishes clearing the charges, it adds the removed charge(s) in the results pane and an Operation Successful box appears. Click **OK.**

NOTE: Cleared finance charges are not deleted

RB9 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 hard copy record of finance charges you generated and cleared today.

1. **Receivables > Finance Charges**
2. In **Search By** pane, don't make any changes to the defaults if you want to see your activity for today.
   - **Finance Charge Date From**

     Leave as today.
   - **Finance Charge Date To**

     Leave blank.
   - **Bill To Firm**

     Leave blank.
   - **Invoice No.**

     Leave blank.
   - **Business Units**

     Leave as ALL.
3. Click . RB9 lists all of the invoices for which you generated or cleared finance changes today.
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

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**

     Yes – Default. To show posted subtotals in addition to account totals.

     No – To show 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). BUs are set in Business Units.
3. Click . RB9 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. Export a report to save it and/or edit it in another application, or print it. 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 by time period, grand total owed, firm name or number, assigned collector, or COD status. Find details about the clients, their invoices, and your collection efforts. Resend invoices. Export the list as a report to an *Excel* spreadsheet or generic file, and print the report.

1. Search for overdue invoices

1. **Receivables > Aged A/R**
2. In the **Search By** pane, click to see all currently overdue invoices or make selections in the filters 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 firms 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 under a parent firm together into one row.

- **Collector**

  Leave blank unless you want to see outstanding invoices a single resource is responsible for collecting, i.e., you only want to see your clients with outstanding invoices. See Looking up resources.

- **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 up 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

RB9 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.
- **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.
- **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 *(RB9 Standard only)*.
- **View previous collection efforts & make new ones,** click a hyperlinked firm name. In the View Firm window, click **Edit.** See Recording collections efforts.
- **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 and the collector** assigned to the account by clicking next to a 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.
- **Resend invoices** by checking their boxes in the **Invoices for period [date range]** pane, then clicking **Send Invoices** (see Composing emails & text messages).

- **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.

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.** RB9 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
- Invoice lists

Step-by-step instructions

- Looking up firms
- Looking up resources
- Searching for payment histories
- Viewing client activity
- Sending collection letters
- Recording collections efforts
- Composing emails & text messages
- 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. (See Entering additional firm information.)

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 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 select a date range. See Date Navigator.

- ***Invoice Date To**

  Required. Defaults to 30 days ago, so as not to include current invoices.

- **Party Type**

  Bill To – Default. Firm that pays invoices.

  Bill To Parent – Parent company of firm paying invoices.

- **Firm**

  To send statements for a single firm. See Looking up firms.

- **Firm Class**

  Quality or ranking of a law firm. Classes are set up in Lists > Firms, and a firm is ranked in their Marketing pane. See Entering firm marketing information.

- **Case**

  To send statements related to a single case. See Looking up cases.

- **Print Claim No. on Statement**

  No – Default.

  Yes – 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). BUs are set in Business Units.

3. Click . RB9 lists all of the firms that meet the specified search condition(s), along with the outstanding amount.

4. Check box(es) of firms to whom you want to send statements (use Shift + Click to select or deselect a continguous range of boxes), or check the box in the header to select all.

5. Click **Send >**

   - **Print Open Invoices Only** – To save or send 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 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 invoices for outstanding balances without summary statements to clients' Accounting email addresses (see Managing notification emails). See Emailing & texting from RB9. After sending the email, RB9 makes an entry recording the email in the Notes Log of the contact(s) and the Email Log *(RB9 Standard only)*.
   - **Email Statements Only** – To send statements without invoices to clients' Accounting email addresses. See Emailing & texting from RB9. After sending the email, RB9 makes an entry recording the email in the Notes Log of the contact(s) and the Email Log *(RB9 Standard only)*.
   - **Email Statements and Open Invoices** — Include invoices that detail the outstanding balances with the statements in emails to clients' Accounting email addresses. See Emailing & texting from RB9. After sending the email, RB9 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

- Firms lists
- Business Units
- Email Log
- Statement preferences

Step-by-step instructions

- Entering additional firm information
- Entering additional contact information
- Looking up firms
- Entering firm marketing information
- Looking up cases
- Printing invoices, statements & reports
- Managing notification emails
- Emailing & texting from RB9
- Viewing email logs

Printing client account activity reports

RB9 Standard only

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**

     Sold To – Default. Ordering party.

     Bill To – Party responsible for paying the invoice
   - **Parent Firm**

     To see all activity across one multi-branch 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). BUs are set in Business Units.
3. Click . RB9 lists all of the firms and their transactions posted for the specified period and grouped by business unit as a report. 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 Firms

- Lookup panel
- Accounting lists
- Business Units

Step-by-step instructions

- Looking up firms
- Printing invoices, statements & reports

Viewing paid invoices

RB9 Standard only

See all invoices paid within a specific period, grouped and sorted by payment date. View and edit invoice details. Export and print the results.

1. **Receivables > Paid Invoices**
2. In the **Search By** pane, make selections as needed:
   - **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). BUs are set in Business Units.
3. Click . RB9 lists all of the invoices that were paid within the specified date range.
4. Click a hyperlinked invoice number to view invoice details. Click **Edit** in the View Invoice window to update information. See Generating invoices.
5. 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

- Generating invoices
- Exporting & printing results

Viewing voided invoices

RB9 Standard only

View all invoices voided within a specific period. View and edit invoice details. Export and print the results.

1. **Receivables > Voided Invoices**
2. In the **Search By** pane, make selections as needed:
   - **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). BUs are set in Business Units.
3. Click . RB9 lists all of the invoices that were voided within the specified date range.
4. Click a hyperlinked invoice number to view invoice details. Click **Edit** in the View Invoice window to update information. See Generating invoices.
5. To export and save 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
- Generating invoices
- Exporting & printing results

Collections

Collections is the process of pursuing payments of debts owed by individuals or businesses.

Reference

- Collections workflow
- 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

Sending collection letters

RB9 Standard only

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 to them with all of the details automatically filled in by RB9 and optionally with the relevant invoices attached. RB9 will also log 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 schedules jobs and pays invoices unless a separate Bill To firm has been designated.

   - ***Firm**

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

   - **Contact**

     Select a single contact from the firm in the drop-down. Default is ALL.

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

     To view 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.

   - **Case**

     Click to find invoices for a single case (see Looking up cases).

   - **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: Send collection letters from Aged A/R

   In Aged A/R you can start this collection letter process directly for any client listed — instead of having to enter search parameters in Collection Letters. See Finding overdue invoices.

3. Click . RB9 displays all of the invoices that meet the search criteria. Click a hyperlinked invoice number, firm, or contact to view/edit details.
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. (If template doesn't appear in the pane, select a different set of forms in **Form Group.)**

7. In **Send Method:**

   - **Email**
     Default method of sending letters.

   - **Print**

     To send letter via the post or other delivery service.

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.**

   - **If emailing,** review and edit the email if desired before sending. See Composing emails & text messages. RB9 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

- Finding overdue invoices
- Looking up firms
- Looking up cases
- Composing emails & text messages
- Printing letters
- Recording collections efforts

Following up on collection promises

RB9 Standard only

Pull up the past action and/or remind list to keep collection tasks on track. Record client responses and promises, and set reminders for further follow up, if necessary.

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**

     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.**
   - **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 resource in charge of collecting overdue payments. See Looking up resources.
3. Click . RB9 lists all of the clients that meet the search criteria.
4. Click a hyperlinked firm to view the firm's collection history.
5. Click **Edit** in the View Firm window to record your current collection effort. See Recording collections efforts.

Reference

- Collections
- Collections workflow
- Date Navigator

Step-by-step instructions

- Recording collections efforts
- Looking up resources

Forecasting cash flow from collections

RB9 Standard only

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 needed. See Date Navigator.
   - **Collector**

     Resource in charge of collecting overdue payments. To specify a resource, see Looking up resources.
3. Click . RB9 lists all of 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
- Collections workflow
- Date Navigator
- Account Overview

Step-by-step instructions

- Looking up resources
- Viewing entity activity
- Recording collections efforts

Collections workflow

Use RB9 to find who owes you and how much. Then use its collection tools to follow up and track your collection efforts.

First, find the clients who owe you the most the longest with the Aged A/R report.

Contact clients with overdue invoices and record your current collection effort. Set reminders for follow-ups.

Use RB9's collection letters to contact clients via email or traditional mail with all relevant details filled in.

Keep your collection efforts on track by following up as scheduled.

Forecast future income from collections based on current outstanding invoices.

Reference

- Collections

Step-by-step instructions

- Finding overdue invoices
- Recording collections efforts
- Sending collection letters
- Following up on collection promises
- Forecasting cash flow from collections

Payables payroll procedure

Payroll process in RB9.

Review a specific pay date's invoices, grouped and subtotaled by resource. Review and modify RB9's automatic selection of invoices for any resource. You can also reset (restart) an incorrect payroll.

Change pay amounts for specific service items on posted invoices. You can also add additional pay tied to specific service items, and change the resource for specific service items.

Correct errors in calculating resource pay by entering pay adjustments for a specific paydate. Generate recurring deductions, if applicable.

Finalize/close payroll.

After closing payroll, make a final copy of the Resource Pay Statements report, then send resources their pay statements.

If you have RB Connect, resources can view their pay statements (current and past) online, eliminating the need to print or email statements.

You can print resource payroll checks directly from RB9, transfer them to *QuickBooks* or export them in NACHA format for direct deposits.

Reference

- Pay Resources
- Override Resource Pay
- Pay Adjustments
- Send Resource Pay Statements
- RB Connect
- Print Checks
- QuickBooks Integrator
- NACHA

Step-by-step instructions

- Verifying resource pay
- Reviewing and changing invoice selections
- Resetting payroll and starting over
- Correcting resource pay
- Adding additional pay amounts
- Changing resource to pay
- Entering pay adjustments
- Generating recurring deductions
- Closing payroll
- Printing resource payroll report (final copy)
- Sending resources their pay statements
- Printing resource payroll checks
- Exporting checks for direct deposit

Correcting resource pay

If you made a mistake when entering resource pay on an invoice — for example you forgot to add resource earnings or used the wrong pay rate — you can correct the pay as long as the resource has not been paid yet for the invoices. Add or change resource pay amounts for individual service items on posted invoices.

You can also add pay for service items you are not charging to the client such as parking or mileage. And you can add pay for additional resources here for miscellaneous charges you are not billing to the client. Finally you can change the resource to pay for specific service items.

1. Find an invoice

1. **Payables > Override Resource Pay**
2. In the **Search By** pane, search for an invoice by entering either:
   - **Invoice No.**
     The number of the invoice for which you want to adjust resource pay.
   - **Job No.**
     The invoice's associated job number.
3. Click . Any invoices that fit your search criteria appear, with the associated witness(es) listed.
4. Any service items that resources have not been paid for yet display as hyperlinks. Pay for listed service items that are not hyperlinked cannot be overridden but can have additional pay added.

2. Update pay

- **Change the pay for a service item**
  1. Click the hyperlinked service item.
  2. In the View Service window, click **Edit.**
  3. In the Edit Service window, **Override** is automatically checked. You can change:
     - **Pay Rate**
       Enter the amount (or percentage) of the pay.
     - **Pay Rate Type**
       Specify whether you pay by a flat amount ($) or a percentage (%).

- **Minimum Pay**
  Enter the minimum pay amount, if applicable.

4. Click **Save** in the Edit Service window.

- ### Add additional pay

  Click > **New Additional Pay** next to the witness for whom the resource earned additional pay. See Adding additional pay amounts.

- ### Add additional pay for another resource

  Click > **New Additional Pay** next to the witness for whom another resource earned additional pay. See Adding additional pay amounts.

- ### Change the resource paid

  Click > **New Additional Pay** next to the witness for whom you want ro change resources to receive additional pay. See Changing resource to pay.

NOTE: Pay overrides vs. pay adjustments

Use Override Resource Pay when you want to increase or decrease the amount a resource is paid for a billable service item tied to a specific job/invoice. You can also add new service items to invoices, and designate which resources to pay.

Use Pay Adjustments when you want to increase or decrease a resource's payroll amount for a reason not related to a specific job or invoice, such as a bonus or a repayment of an advance on outstanding invoices. This includes recurring amounts, such as if a resource is paying back an advance in installments.

NOTE: Overriding pay on voided invoices

Normally you cannot override pay on voided invoices. However if you set **Not to void Resource Pay** to Yes when voiding an invoice the resource can be paid and their pay corrected in Override Resource Pay. See Voiding invoices.

Reference

- Payables payroll procedure
- Additional Pay
- Void

Step-by-step instructions

- Adding additional pay amounts
- Changing resource to pay
- Generating recurring deductions
- Voiding invoices

Adding additional pay amounts

You can pay resources for miscellaneous services not charged on posted invoices by adding additional pay amounts. For example you might want to pay the resource for parking without billing the client. You can also add pay for additional resources here for miscellaneous charges you are not billing to the client.

Continued from Adding & updating services, Correcting resource pay, and Changing resource to pay.

1. In the New Additional Pay panel/window, some fields are not editable. Fields you can edit:

   - ***Resource**

     Required

     If the field is blank, you want to add pay for another/different resource, or you want to update the resource's listing, click ▽... **>**

     - **Lookup Resource** – To look up a resource in your Resources database. See Looking up resources.
     - **Lookup Task** – To select a resource assigned to a task in the job being billed. The **Lookup Task** panel lists all resources assigned to the job by task. Click the hyperlinked task in the list to select the associated resource.
     - **View Resource** – To update the resource's listing. See Updating resources.

   - **Pay Rate**

     Default is the selected resource's pay rate. Click ▽... >

     - **Lookup Pay Rate** – If you want to use a different pay rate table than the resource's default. In the **Lookup Pay Rate** panel, the pay rate tables contained in the Pay Rate Group that the resource's designated pay rate table is associated with appear. Click a hyperlinked **Pay Rate Name** to select that rate, or search for a different pay rate (see Lookup panel).
     - **View Pay Rate** – If you want to view the details of the resource's pay rate table.
     - **Remove Pay Rate** – If you want to manually enter the amount of additional pay.

     If the resource doesn't have a default pay rate, click ▫ and click a hyperlinked **Pay Rate Name** to select that rate in the **Lookup Pay Rate** panel, or search for a different pay rate.

   - **Service Subgroup**

     Select one of the categories of services in the main 9. Misc. Charge service group in the drop-down.

- **Service Item**

  Select the service item in the drop-down for which you want to pay the resource an additional amount.

- **Units**

  Default is "0." Enter the number of units.

- **Rate**

  Default is rate set in the Pay Rate Group's rate table for the service item. See Setting up pay rates. Edit number if needed.

2. The **Amount** field automatically updates to the number of **Units** times the **Rate,** and is not editable. If the amount is correct, click **Save.**

Reference

- Payables payroll procedure
- Additional Pay
- Lookup panel
- Pay Rate Group

Step-by-step instructions

- Looking up resources
- Updating resources
- Setting up pay rates

Additional Pay

RB9 Standard only

Additional pay is payment to resources for miscellaneous services not charged on posted invoices. For example, you might want to pay a resource for parking at a deposition without billing the client but you want the payment tied to the job's invoice.

Reference

- Payables payroll procedure
- Additional Resource Production Report

Step-by-step instructions

- Adding additional pay amounts
- Printing additional resource production reports

Changing resource to pay

If the wrong resource is listed for payment on an invoice, you can change the resource if you have not paid the resource yet.

Continued from Correcting resource pay.

1. In the invoice you want to change, click **> New Additional Pay** next to the witness name listed under the resource you want to change. Follow the instructions in Adding additional pay amounts for adding a resource and choose the same service item as the one you want to change resources on.
2. Click **Save.**
3. To remove the incorrect resource, click the hyperlinked service item in the Override Resource Pay window.
4. In the View Additional Pay window, click **Delete.**
5. In the popup that appears, click **Yes.**

Reference

- Payables payroll procedure

Step-by-step instructions

- Correcting resource pay
- Looking up resources
- Adding additional pay amounts

Entering pay adjustments

After reviewing the Draft Resource Pay Statements report, you can adjust resource earnings for the current payroll for amounts not tied to specific invoices, such as a bonus or repayment of an advance. You can also add pay adjustments to other pay dates or to be automatically applied to the resource's next payroll.

1. **Payables > Pay Adjustments**
2. In the Pay Adjustments window, click **New.**
3. In the New Pay Adjustment window, to add a pay adjustment:
   - **For a specific payroll,** click **Pay Date's** . In the Lookup Pay Date popup, this year's open pay dates are listed. To view open dates for another year click **Year's** to page through other years, then click . (Pay dates are set in Setup > Pay Dates.) Click a hyperlinked pay date to select it.
   - **For the resource's next payroll,** skip the **Pay Date** field and continue to the next step.
4. Enter the following information:
   - ***Resource**

     Click to select the resource. See Looking up resources.
   - ***Amount**

     Enter the adjustment amount (e.g., "15.00" or "-25.00"). Negative amounts reduce the resource's pay.
   - **Remarks**

     Enter the description for this adjustment.
5. Click **Save.**

TIP: Have RB9 apply adjustment to resource's next pay

If a resource isn't paid each pay period, you can have RB9 automatically add their adjustment to the next payroll when they will be paid. To have RB9 include an adjustment automatically, do not select a pay date. Pay adjustments that do not have a pay date listed will be set to the resource's next payroll. However if the pay adjustment added without a pay date is a negative amount, it is set to the next payroll only if the amount can be deducted.

NOTE: Pay adjustments vs. pay overrides

Use Pay Adjustments when you want to increase or decrease a resource's payroll amount for a reason not related to a specific job or invoice, such as a bonus or a repayment of an

advance on outstanding invoices. This includes recurring amounts, such as if a resource is paying back an advance in installments.

Use Override Resource Pay when you want to increase or decrease the amount a resource is paid for a billable service item tied to a specific job/invoice. You can also add new service items to invoices, and designate which resources to pay.

Reference

- Payables payroll procedure
- Pay Dates
- Pay Group
- Cutoff Date
- Override Resource Pay

Step-by-step instructions

- Closing payroll
- Managing pay adjustments
- Setting up pay dates
- Looking up resources
- Generating recurring deductions
- Entering pay information

Generating recurring deductions

Before closing payroll, add any recurring deductions (or additions) for the current payroll.

1. **Payables > Pay Adjustments**
2. In the Pay Adjustments window's **Search By** pane, click **Pay Date's** .
3. In the Lookup Pay Date popup, open pay dates are listed. Click the current pay date to select it. (Pay dates are set in Setup > Pay Dates.)
4. In the Pay Adjustments window click **Generate Recurring Deductions.** In the Generate Recurring Deductions popup, all resources with pay adjustments eligible to apply to the selected payroll are listed. (See Entering pay information.)
5. Check the box(es) of any resource(s) listed with recurring amounts you want to apply to the current payroll. Or check the box in the popup's header to select them all. Then click **Generate.**
6. Click **OK** in the popup that appears.
7. To check that the recurring amounts have been added to the payroll, click in the Pay Adjustments window. All pay adjustments and recurring deductions for the pay date will be listed in the results grid.

Reference

- Payables payroll procedure
- Pay Dates
- Pay Group
- Cutoff Date

Step-by-step instructions

- Setting up pay dates
- Entering pay information
- Managing pay adjustments
- Entering pay adjustments

Managing pay adjustments

In addition to adjusting resource earnings for amounts not tied to specific invoices — such as a bonus or repayment of an advance — and applying recurring deductions for the current payroll, you can also look up existing pay adjustments for open and closed dates, edit outstanding pay adjustments, and delete open pay adjustments.

1. **Payables > Pay Adjustments**

2. In the Pay Adjustments window, **Pay Group** and **Cutoff Date** are not editable. (Pay groups and cutoff dates are selected when setting up pay dates.) To:

   - ### View all open pay adjustments

     Click . RB9 lists all open pay adjustments. Pay adjustments that do not have a pay date listed will be set to the resource's next payroll.

   - ### View pay adjustments for a current payroll

     Click **Pay Date's** . In the Lookup Pay Date popup, open pay dates are listed. Click a hyperlinked pay date to select it. (Pay dates are set in Setup > Pay Dates.) Then in the Pay Adjustments window click . RB9 lists all open pay adjustments for the selected payroll.

     - To view a different payroll, click **Pay Date's > Lookup Pay Date** and follow this step to select a different open pay date.
     - To clear the pay date, click **Pay Date's > Remove Pay Date.**

   - ### Check previous payrolls for overlooked pay adjustments

     If you want to review adjustments made on closed payrolls, slide **Closed** to Yes. Then chose the payroll's date(s) in ***Pay Date From/*Pay Date To.** Click . RB9 lists all of the pay adjustments on closed payrolls in the date range selected.

   - ### Find a resource to review/make an adjustment

     To limit the results to a single resource, click **Resource's** , then select the resource before clicking . See Looking up resources. To change the resource, click **Resource's > Lookup Resource** and look up a different resource. To remove the resource, click **Resource's > Lookup Resource**.

3. In the results grid, click an entry's >

   - **View** – To view the pay adjustment's details in the View Pay Adjustment window. You can also view the pay adjustment's details by clicking the hyperlinked **Resource** name.
   - **Edit** – To update the pay adjustment in the Edit Pay Adjustment window. You can

also edit the pay adjustment by clicking **Edit** in the View Pay Adjustment window.

- **Delete** – To remove the pay adjustment from RB9. Click **Yes** in the popup. You can also delete the pay adjustment by clicking **Delete** in the View Pay Adjustment/Edit Pay Adjustment window.

NOTE: Pay adjustments vs. pay overrides

Use Pay Adjustments when you want to increase or decrease a resource's payroll amount for a reason not related to a specific job or invoice, such as a bonus or a repayment of an advance on outstanding invoices. This includes recurring amounts, such as if a resource is paying back an advance in installments.

Use Override Resource Pay when you want to increase or decrease the amount a resource is paid for a billable service item tied to a specific job/invoice. You can also add new service items to invoices, and designate which resources to pay.

Reference

- Payables payroll procedure
- Pay Dates
- Pay Group
- Cutoff Date
- Override Resource Pay

Step-by-step instructions

- Entering pay adjustments
- Generating recurring deductions
- Setting up pay dates
- Looking up resources
- Entering pay information

Verifying resource pay

The first step in paying resources is to run the Draft Resource Pay Statements report for review. The Draft Resource Pay Statements report lists each invoice (selected for the specified pay date), grouped and subtotaled by resource. You can print out or email copies to resources of abbreviated versions for their review. If you or your resources find any errors or missing information, you can modify the current payroll before closing payroll.

1. **Payables > Pay Resources**
2. In the Pay Resources window's **Search By** pane, click ***Pay Date's** .
3. In the Lookup Pay Date popup, open pay dates are listed. Click a hyperlinked pay date to select it. (Pay dates are set in Setup > Pay Dates.)
4. In the Pay Resources window:
   - **Pay Group**

     Defaults to the pay group associated with the pay date selected and is not editable. (Pay groups are selected when setting up pay dates.)
   - **Cutoff Date**

     Defaults to the last date for invoices to be included in the pay date selected and is not editable. (Cutoff dates are designated when setting up pay dates.)
   - **Show Zero Pay Resources**

     Default is No. If you want to see all resources who are owed money on outstanding invoices, whether they are scheduled to be paid on this pay date, slide to Yes.
5. Click . (If no payroll exists for the pay date selected, RB9 pops up a message asking if you want to calculate payroll. Click **Yes.**) RB9 lists all of the resources that are to be paid on the specified pay date.

   NOTE: How payrolls are populated

   Resources are paid based on the number of days from the invoice date entered in their pay information for originals and copies. See Entering pay information. Payroll also include pay adjustments entered for specific pay dates or set to be applied to the next available payroll. See Entering pay adjustments. (If the "next available payroll" pay adjustment is a negative amount, it is set to the next payroll only if the amount can be deducted.)
6. Click **Draft Resource Pay Statements >**
   - **Print Office/Resource Copy - Summary** – To see a report that only lists pay amounts by invoice with no further break-downs by service item. This is the draft of

the report you will send to resources if you prefer to give them pay statements with no details.

- **Print Office Copy - Detail** – To see resource pay amounts for each invoice broken down by service item, including billing rate, number of units, pay rate and pay percentage. This is the best draft report to select for verifying pay because it is the most complete.
- **Print Resource Copy - Detail** – To see a copy of the report resources will receive if you want them to have a detailed report listing pay by service item for each invoice included in this payroll. This report is similar to the Print Office Copy - Detail, except it does not include billing rate or pay percentage.
- **Email Resource Copy - Summary** – To send the draft version of the report that only lists pay amounts by invoice with no further break-downs by service item.
- **Email Resource Copy - Detail** – To send the draft version of the report resources will receive if you want them to have a detailed report listing pay by service item for each invoice included in this payroll.

7. If you chose:
   - **A print option,** the Print Pay Statements window opens with the pay statements compiled into a draft report, one resource per page. Review the report to ensure that all entries are correct. To export, save or print the draft report, see Printing invoices, statements & reports.
   - **An email option,** click **OK** in the **Options** popup to send the draft pay statement(s) immediately. If you want to use different options from the defaults, preview the email, edit, or attach files, see Emailing & texting from RB9. Click **OK** again in the popup that appears when the emails have been sent. RB9 notes the success of its emailing for each resource in the **Result** column.

   ### NOTE: Draft vs. final reports

   RB9 displays draft reports with "DRAFT" as a watermark on each page (so you know, for example, that that the draft Resource Copy - Detail report is not a pay statement to send to resources).

8. If you or your resources find any errors in the report, before closing payroll, you can:
   - Change which invoices you are paying a resource for.
   - Override resource pay on invoices if you found any errors or need to make adjustments.
   - Pay resources for job-related services you are not charging to the client, such as parking at a deposition.

- Change the resource to pay for specifice service items on an invoice.
- Make pay adjustments and generate recurring deductions.
- Reset payroll and start over.

9. After verifying current payroll is correct, close payroll before paying resources or sending pay statements.

TIP: Quickly scan report for errors

The fastest way to audit the Pay Amount is to scan down the Pay % column in the **Draft Resource Pay Statements > Print Office Copy - Detail** report. Any percentage that stands out like a sore thumb will alert you to possible billing errors.

Reference

- Payables payroll procedure
- Pay Dates
- Cutoff Date
- Pay Group

Step-by-step instructions

- Setting up pay dates
- Entering pay information
- Entering pay adjustments
- Printing invoices, statements & reports
- Emailing & texting from RB9
- Reviewing and changing invoice selections
- Correcting resource pay
- Adding additional pay amounts
- Changing resource to pay
- Entering pay adjustments
- Generating recurring deductions
- Resetting payroll and starting over
- Closing payroll

Closing payroll

You must close (i.e., finalize) payroll before you can pay resources or send them pay statements. This is to ensure that no changes can be made to the payroll data after you distribute checks and pay statements to your resources.

1. **Payables > Pay Resources**
2. In the Pay Resources window's **Search By** pane, click ***Pay Date's** .
3. In the Lookup Pay Date popup, open pay dates are listed. Click the current payroll date to select it. (Pay dates are set in Setup > Pay Dates.)
4. In the Pay Resources window:
   - **Pay Group**
     Defaults to the pay group associated with the pay date selected and is not editable. (Pay groups are selected when setting up pay dates.
   - **Cutoff Date**
     Defaults to the last date for invoices to be included in this pay date selected and is not editable. (Cutoff dates are designated when setting up pay dates.)
   - **Show Zero Pay Resources**
     Leave as default, No.
5. Click . RB9 lists all of the resources that are to be paid on the specified pay date.
6. Click **Draft Resource Pay Statements > Office Copy - Detail.** The Print Pay Statements window opens with the pay statements compiled into a draft report, one resource per page.
7. Use the report to verify that all changes and updates you've entered are included. To export, print or save a copy, see Printing invoices, statements & reports.
8. After verifying payroll is correct, click **Close Payroll.**
9. In the popup that appears asking if you are sure you want to close payroll, click **Yes.**
10. After closing payroll, make a final copy of the Resource Pay Statements report, then send resources their pay statements.

Reference

- Payables payroll procedure
- Pay Dates
- Pay Group
- Cutoff Date

Step-by-step instructions

- Setting up pay dates
- Verifying resource pay
- Printing invoices, statements & reports
- Printing resource payroll report (final copy)
- Sending resources their pay statements

Printing resource payroll report (final copy)

After closing payroll, save a final copy of the Resource Pay Statements report for your records before sending resources their pay statements.

1. **Payables > Send Resource Pay Statements**
2. In the Send Resource Pay Statements window's **Search By** pane, click ***Pay Date's** .
3. In the Lookup Pay Date popup, closed pay dates are listed. Click the current pay date (that was just closed) to select it.
4. In the Send Resource Pay Statements window:
   - **Pay Group**

     Uneditable. Defaults to the pay group associated with the pay date selected. (Pay groups are selected when setting up pay dates.)
   - **Cutoff Date**

     Uneditable. Defaults to the last date for invoices to be included in this pay date selected. (Cutoff dates are designated when setting up pay dates.)
5. To choose the order in which invoices appear on the pay statement PDFs, select an option in the **Sorting in Pay Statement** dropdown:
   - **Invoice Date** – Default. To sort by posted dates chronologically, oldest first.
   - **Invoice No.** – To sort by invoice numbers, lowest to highest.
   - **Job Date** – To sort by scheduled job dates chronologically, oldest first.
   - **Job No.** – To sort by job numbers, lowest to highest.
6. Click . RB9 lists all resources to be paid in the current payroll, along with the amounts to be paid.
7. Check the box in the header to select all resources. If you do not want to pay any listed resource, uncheck their box.
8. Click **Send > Print Office Copy - Detail.** The report lists each invoice (to be paid for the specified payroll), grouped and subtotaled by resource, with each resource starting on a new page. The last page of the report lists the grand total amount for all resources included in the report.
9. Export, save or print the report (see Printing invoices, statements & reports). When finished in the Print Pay Statements window, click **Close.**
10. With the resources still selected in the Send Resource Pay Statements window, send

resources their pay statements. See Sending resources their pay statements.

Reference

- Payables payroll procedure
- Pay Group
- Cutoff Date

Step-by-step instructions

- Closing payroll
- Printing invoices, statements & reports
- Sending resources their pay statements

Sending resources their pay statements

After closing payroll and making a final copy of the Resource Pay Statements report for the office, email resources their pay statements, or print and mail the statements along with their paychecks.

Continued from Printing resource payroll report (final copy).

1. In the Send Resource Pay Statements window, uncheck the box for any resources whom you do not want to receive pay statements this time.

   TIP: Provide pay statements in the format resources need them

   If you will email some pay statements, but others you will mail or otherwise give to resources, you will need to generate pay statements in 2 separate batches. And resources that are not people, such as your conference rooms, probably do not need a pay statement.

2. Click **Send >**

   - **Print Office/Resource Copy - Summary**

     To generate simplified pay statements that only include invoice totals to mail or hand to resources or save for your records. The last page of the report is a separate page that lists the grand total amount for all resources included in the report.

   - **Print Office Copy - Detail**

     To generate pay statements for your records that break down the invoice totals to included their service items' details (billing rate, number of units, pay rate, pay percentage, and subtotal). The last page of the report lists the grand total amount for all resources included in the report.

   - **Print Resource Copy - Detail**

     To generate pay statements that break down the invoice totals to included their service items' details (number of units, pay rate, and subtotal) to mail or hand to resources.

   - **Email Resource Copy - Summary**

     For emailing simplified pay statements to resources.

   - **Email Resource Copy - Detail**

     For emailing pay statements that include service item details to resources.

3. To send the report:

   - **If a Send > Print option was selected** – To export, save or print the report, see Printing invoices, statements & reports. When finished, click **Close** in the Print Pay Statements window.

- **If a Send > Email option was selected** – Click **OK** in the **Options** popup to send the pay statement(s) immediately. If you want to use different options from the defaults, preview the email, edit, or attach files, see Emailing & texting from RB9. Click **OK** again in the popup that appears when the emails have been sent. RB9 notes the success of its emailing for each resource in the **Result** column.

  #### TIP: Add email address on the fly

  If a resource does not have an email address in their RB9 listing, you can enter their address in the mail composer before attempting to send them email.

  If you want to send multiple emails at once and are not sure if everyone has an email address, you can send the emails without going through the email composer first. Any resources without an email address will return a result of "Email address does not exist." You can then use the mail composer for any of those resources to enter their address for this email.

  RB9 will not remember this address, so you will have to enter it in their resource listing to save it for future use. See Entering general resource information and Managing notification emails.

NOTE: Emailed pay statements' paper trail

After emailing a Resource Pay Statement, RB9 generates automatic entries in the resource's Notes Log and the Email Log *(RB9 Standard only)* recording the date, time, and user who sent the email.

Reference

- Payables payroll procedure
- Pay Statements preferences
- Email preferences
- Notes Log
- Email Log

Step-by-step instructions

- Closing payroll
- Printing resource payroll report (final copy)
- Printing invoices, statements & reports
- Emailing & texting from RB9
- Entering general resource information
- Managing notification emails

Printing resource payroll checks

After closing payroll and printing a final copy of the Resource Pay Statements report, the last task is to cut checks. If you want to print checks, RB9 will create a PDF of the check information, according to your settings (see System Preferences > Payables) to print on your own voucher or standard business checks.

1. **Payables > Print Checks**
2. In the Print Checks window's **Search By** pane, the current pay date (that was just closed) appears in **Pay Date.**
3. Click . RB9 lists all of the resources being paid in the current payroll along with their check amounts.
4. Check the boxes of resources you want to pay via check or check the box in the header to choose all resources.
5. Click **Print.**
6. Enter the following information:
   - **Starting Check No.**
     Enter the starting check number. RB9 supports *QuickBooks*-compatible laser checks (standard or voucher).
   - **Memo Line Text**
     Enter a message to be printed in the Memo field on each check.
7. Click **OK.** RB9 creates a PDF file of the checks to print from *Adobe Acrobat* (see Printing PDFs from RB9), and enters the check numbers and date in the paid resources' listings in the Print Checks window's results grid.

NOTE: Checks include resource billing address

RB9 will use a resource's billing address instead of their home address if it is available. See Entering general resource information.

TIP: Adjust your check printing settings

If the RB9 information is not printing in the right location on your checks, enter values in **Additional Left Margin** and **Additional Top Margin** fields in Setup > System Preferences > Payables > Check to correct the printout.

Reference

- Payables payroll procedure
- Payables preferences

Step-by-step instructions

- Entering general resource information
- Exporting checks for direct deposits
- Exporting checks for *QuickBooks*
- Printing PDFs from RB9

Exporting checks for direct deposit

Skip the hassles of printed checks, direct deposit them in your resources' accounts instead. After signing up for direct deposit with your bank, set up your system preferences for direct deposit payables and enter your resources' banking information in their profiles. Then all you have to do is send a NACHA-formatted file (exported from RB9) to your bank, and they will transfer the funds for you.

1. **Payables > Print Checks**
2. In the Print Checks window's **Search By** pane, the current pay date (that was just closed) appears in **Pay Date.**
3. Click . RB9 lists all of the resources being paid in the current payroll along with their check amounts.
4. Check the boxes of resources you want to pay via direct deposit or check the box in the header to choose all resources. The resources you select must have their **Bank Account No.** and **Bank Routing No.** included in their listings. If any resource doesn't have this information, click their hyperlinked name and add the information to their profile. See Entering pay information.
5. Click **Export > NACHA.**
6. In the NACHA Options popup that appears, the default ***Effective Date** (as described in the dialog box) is two days from today's date. Leave as is, or click to select a different date in the Date Navigator. Then click **OK.**
7. RB9 creates the NACHA-formatted file. Send this file (file name is NACHA-[today's date].txt) to your bank for processing.

IMPORTANT: Both you & your resources must be set up for direct deposit

Before exporting for direct deposit, check that you have entered the required NACHA settings under Setup > System Preferences > Payables. Some of this information is from your business account, the rest you can get from your bank when you sign up for direct deposit.

Reference

- Payables payroll procedure
- NACHA
- Payables preferences
- Date Navigator

Step-by-step instructions

- Printing resource payroll checks
- Entering pay information
- Exporting checks for *QuickBooks*

NACHA

ACH (Automated Clearing House) is the electronic funds transfer system used to transmit funds, such as direct deposits and other monetary transactions, from one bank account to another. The ACH system is governed by the rules of the **National Automated Clearing House Association (NACHA).** This system provides for the inter-bank clearing of electronic entries for participating financial institutions.

Reference

- Payables payroll procedure
- Payables > NACHA
- Date Navigator

Step-by-step instructions

- Entering pay information
- Exporting checks for direct deposit

Exporting checks for *QuickBooks*

If you use *QuickBooks* to print resource payroll checks and deduct the amounts from your checking account, export the information here to import into *QuickBooks.*

1. **Payables > Print Checks**
2. In the Print Checks window's **Search By** pane, the current pay date (that was just closed) appears in **Pay Date.**
3. Click . RB9 lists all of the resources being paid in the current payroll along with their check amounts.
4. Check the boxes of resources you want to pay via *QuickBooks* or check the box in the header to choose all resources.
5. Click **Export > QuickBooks IIF.**
6. RB9 creates the file and downloads it to your computer so you can import it into *QuickBooks.*

TIP: Skip a step with QuickBooks Integrator

You can import payroll directly into QuickBooks and eliminate the need to export payroll first by using the QuickBooks Integrator *(RB9 Standard only)* in Tools. See Importing resource payroll checks into *QuickBooks*.

Reference

- QuickBooks Integrator

Step-by-step instructions

- Entering pay information
- Importing resource payroll checks into *QuickBooks*

Reviewing payroll amounts

Look up what you have paid any or all of your independent contracts, broken down by pay date and amount. View payment details and adjust pay amounts to correct them, if needed.

1. **Payables > 1099 Pay Detail**
2. In the 1099 Pay Detail window's **Search By** pane:
   - ***Pay Date From/*Pay Date To**

     Required. Default is last year. To view a different pay period, change the date range (see Date Navigator).
   - **Resource**

     If you want to see pay details for a single resource, click and choose the resource. (See Looking up resources).
3. Click . Any resources that meet the search criteria are listed along with the pay date, amounts paid, any adjustments, check dates, check numbers and comments. If you want to:
   - **Review a payment** – Click the payment's **> View** or its hyperlinked pay amount**.** In the View Pay window, you can look up the resource by clicking .
   - **Update a payment** – Click the payment's **> Edit** to access the Edit Pay window directly. Or click its hyperlinked pay amount, then click **Edit** in the View Pay window. In the Edit Pay window enter:
     - **Check Date**

       Click and select the date in the Date Navigator.
     - ***1099-Issuing Business Unit**

       Select the company profit center that is responsible for the resource's 1099-NEC form in the drop-down. BUs are set up in Business Units.
     - **Check No./Remarks**

       Enter the check number and/or remarks about the payment.
   - **Make an adjustment** – See Adjusting payroll amounts.
   - **Delete an adjustment** – Click the payment's **> Delete** or click its hyperlinked pay amount then click **Delete** in the View Pay window. Click **Yes** in the popup.

Reference

- Payables payroll procedure
- Date Navigator
- Business Units

Step-by-step instructions

- Looking up resources
- Adjusting payroll amounts

Adjusting payroll amounts

Adjust pay amounts to correct them before printing IRS 1099-NEC forms for your independent contractors or to include checks written by hand (such as advances).

For example, if you started using RB9 after you had already issued paychecks (for independent contractors) earlier in the calendar year, you must enter year-to-date (YTD) information to summarize payroll transactions from January 1st up to your RB9 start date to make the 1099-NEC forms accurate.

1. **Payables > 1099 Pay Detail**
2. In the 1099 Pay Detail window, click **New.**
3. In the New Pay window, enter:

- ***Resource**
  Required. Click and choose the resource. (See Looking up resources).
- ***Pay Date**
  Required. Click and select the date in the Date Navigator.
  - **To include prior payroll,** enter the last payroll date before you started using RB9.
  - **To add handwritten checks,** enter the actual pay date.
- ***Amount**
  Required
  - **To include prior payroll,** enter the total payroll amounts you paid during the calendar year from January 1 to the date entered in ***Pay Date.**
  - **To add handwritten checks,** enter the actual amount.
- **Check Date**
  Click and select the date in the Date Navigator.
  - **To include prior payroll,** enter the last check date before you started using RB9.
  - **To add handwritten checks,** enter the actual check date.
- ***1099-Issuing Business Unit**
  Required. Select the company profit center associated with the resource's jobs in the drop-down. BUs are set up in Business Units.
- **Check No./Remarks**
  Enter the check number and/or reason for the adjustment.

4. Click **Save.** The new amount is added to the resource's pay listings with a checkmark in the **Adjustment** column of the 1099 Pay Detail window.

Reference

- Payables payroll procedure
- Date Navigator
- Business Units

Step-by-step instructions

- Reviewing payroll amounts
- Looking up resources

Printing 1099-NEC forms

RB9 Standard only

View onscreen summaries of your independent contractors' taxable pay. Then print out their 1099-NEC information on preprinted laser-compatible IRS forms.

1. **Payables > Print 1099 Forms**
2. In the **Search By** pane:
   - ***Pay Date From/*Pay Date**
     Required. Default to last year. Change date range, if desired (see Date Navigator).
   - **Pay Group**
     Categories of time periods your company uses to pay resources, e.g., Monthly, Weekly, On Demand. Default is ALL. Click to restrict search to resources tied to specific pay groups (see Lookup panel). Pay groups are set up in Lists > Resources.
   - **Resource**
     To limit the results to a single resource, click , then select the resource. See Looking up resources.
   - **Cutoff Amount**
     The smallest paid amount in dollars for which you are issuing 1099s. Default is $600.
   - **1099-Issuing Business Units**
     Company profit centers that pay resources. Default is ALL. Click to restrict search to resources paid for specific BUs' jobs (see Lookup panel). BUs are set up in Business Units.
3. Click . RB9 lists all of the resources that meet the specified search condition(s).
4. Check the boxes of resources who should receive 1099s. OR check the box in the header to select all.
5. Click **Print >**
   - **1099-MISC:** Don't use this unless advised to by your accountant.
   - **1099-NEC:** Use this option for payments to independent contractors like reporters and other resources.
6. In the 1099 Form Options popup that appears, select the issuing business unit in the ***Payer's Business Unit** drop-down. Then click **OK.**
7. RB9 creates a PDF file of the 1099 information to print from *Adobe Acrobat* on

preprinted laser-compatible IRS forms. See Printing PDFs from RB9.

NOTE: Not all resources require 1099 forms

Check the **Print 1099 Form** box in the Pay Info pane of any resources that you want to provide 1099s to. 1099 forms will be printed only for those resources with this box checked. (See Entering pay information.)

Reference

- Payables payroll procedure
- Date Navigator
- Lookup panel
- Pay groups
- Resources lists
- Business Units

Step-by-step instructions

- Looking up resources
- Printing PDFs from RB9
- Entering pay information

Printing sales commission reports

View all invoices that include a commission, grouped and subtotaled by resource or sales rep (account executive). Voided commissions are listed on the report as adjustments.

1. Generate report

1. **Payables > Sales Commission Report**
2. In the **Search By** pane, specify the following search filters:
   - **Date Type**

     Default is Invoice Post Date. Select Payment Post Date in the drop-down 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 (see Date Navigator).
   - **Commission For**

     Default is Sales Rep. Select Client Of in the drop-down to search for resources who earn commissions on their own clients.
   - **Original/Copy**

     Default is ALL. Select Original Only in the drop-down if you do not pay commissions on copy sales. Select Copy Only if you want to see copy sales commissions only.
   - **Deduct Resource Cost**

     Default is No. Slide to Yes if you pay commissions based on RARE (Revenue After Resource Expenses) or NIBO (Net Income Before Overhead).
   - **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). BUs are set in Business Units.
3. Click . RB9 lists all of the invoices that meet the specified search condition(s) as a report, grouped by resource/sales rep. The search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.

2. Export/print results

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 in Adjustments for each resource or sales representative if **Not to void Client Of Commission** or **Not to void Sales Rep Commission** are not selected when voiding an invoice. See Voiding invoices.

Reference

- Date Navigator
- Sales Rep
- Client Of
- Lookup panel
- Business Units

Step-by-step instructions

- Printing invoices, statements & reports
- Voiding invoices

Overriding commissionable amounts

RB9 calculates commissions by multiplying the commissionable amount by the sales rep or resource's commission rate. (See Entering pay information.) The commissionable amount is calculated and stored for each invoice by adding all of the service items that are marked as "commissionable." Whether a particular service item is commissionable or not is specified in the Service Item Master. (See Entering billing & pay rates.) However, you can override the calculated commissionable amount using this function.

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.

   - **Job No.**

     Job number tied to the commissionable invoice.

   - **Date Type**

     Invoice Date is the default. Select Job Date to search for invoices by their related job's date.

   - **Date From/Date To**

     Works with **Date Type.** Enter a date range, if desired (see Date Navigator).

   - **Case**

     Click to select a case to restrict the search to invoices tied to that case (see Looking up cases).

   - **Commission For**

     Default is Sales Rep. Select Client Of in the drop-down to search for invoices tied to resources who earn commissions on their own clients.

     Click to find a resource to restrict the invoice search to (see Looking up resources).

   - **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). BUs are set in Business Units.

3. Click . RB9 lists all of the invoices that meet the specified search condition(s).

2. Perform operations

- **To view a commission's details**

  Click its **> View** or its hyperlinked invoice number.

- **To override the commissionable amount for an invoice**

  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, enter the new amount in:
     - **Client Of Commissionable Amount**
       For resources with their own clients.
     - **Sales Rep Commissionable Amount**
       For sales reps.
  3. Click **Save.**

NOTE: Correct Sales Rep or Client Of
If the wrong resource appears in **Sales Rep** or **Client Of,** update the resource in the Edit Sales Commission window by clicking **> Lookup Resource** next to the name and selecting the correct resource. (See Looking up resources.)

Reference

- Service Item Master
- Date Navigator
- Sales Rep
- Client Of
- Lookup panel
- Business Units

Step-by-step instructions

- Entering pay information
- Entering billing & pay rates
- Looking up cases
- Looking up resources

Printing additional resource production reports

This report lists each invoice (including the unit count) having additional pay, grouped and subtotaled by resource.

1. Generate report

1. **Payables > Additional Resource Production Report**
2. In the **Search By** pane, click to generate a report for all of today's invoices that include additional pay. Or use search filters to refine the search before clicking :
   - ***Post Date From/*Post Date To**

     Required. Date(s) invoices were closed. Defaults to today. Change date range, if desired (see Date Navigator).
   - **Resource**

     To see report for a single resource, see Looking up resources.
   - **Resource Type**

     Profession type (such as Scopist, Proofreader or Interpreter). Default is ALL. Click to restrict search to certain resource types (see Lookup panel). Resource types and options are set in Lists > Resources.
   - **Service Subgroup**

     Service Item Subgroup that contains the service(s) to be included in report. Default is ALL. To restrict search to a single group of services, select a subgroup in the drop-down. Only those service items belonging to the selected subgroup will appear in the **Lookup Service Items** popup.
   - **Service Items**

     Regular charges that you bill to your clients. Default is ALL. To restrict search to fewer services, first select a subgroup in the **Service Subgroup** drop-down. Then click to restrict search to certain service items (see Lookup panel). Service items are set in Service Item Master.
   - **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). BUs are set in Business Units.
3. Click . RB9 lists all of the invoices that meet the specified search condition(s) as a report, grouped by resource. Voided invoices are included in the report if their pay

amount was set to "Not to void Resource Pay" when the invoices were voided (see Voiding invoices). The search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.

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

Reference

- Additional Pay
- Date Navigator
- Resources
- Lookup panel
- Resources lists
- Service Item Subgroups
- Service Items
- Service Item Master
- Business Units

Step-by-step instructions

- Voiding invoices
- Printing invoices, statements & reports

Printing total payable reports

View all invoices still due to resources, grouped and subtotaled by resource. The grand total shown on the last page is your current resources payable liability.

1. Generate report

1. **Payables > Total Payable Report**
2. In the **Search By** pane, click to generate your total payable report. RB9 lists all of the invoices with outstanding payables to resources as a report, one resource per page. Voided invoices are included in the report if their pay amount was set to "Not to void Resource Pay" when the invoices were voided (see Voiding invoices).

2. Export/print results

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

TIP: Give resources a list of their outstanding pay

If you want to distribute this report to resources, select Resource Copy in the **Type** drop-down. RB9 will generate the report without the invoice amount column.

If you only want to give a single resource their report, click next to **Resource** and select the resource. See Looking up resources.

Step-by-step instructions

- Voiding invoices
- Printing invoices, statements & reports
- Looking up resources

Generating sales tax reports

View all invoices having sales tax charges generated for a specific period.

1. Generate report

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 (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). BUs are set in Business Units.
3. Click . RB9 lists all of the invoices that meet the specified search condition(s).

2. Export/print results

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

NOTE: How sales tax works in RB9

To understand how sales tax works in RB9, you should be aware of the following:

- The **sales tax rate** is specified for each client in the Firms table. 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 marked as "sales taxable." Whether a particular service item is sales taxable or not is specified in the Service Items Master or in individual billing rate tables. See Entering billing & pay rates.

Reference

- Date Navigator
- Lookup panel
- Business Units

- Service Items Master
- Billing Rates

Step-by-step instructions

- Exporting & printing results
- Entering additional firm information
- Entering billing & pay rates

Keeping track of resources payable balances

You can get an instant snapshot of resources payable, or reestablish a starting balance as of a certain date by using this audit function.

1. **Payables > Liability Balance Log**
2. In the **Search By** pane:
   - ***Post Date From**

     Required. Date invoices were closed. Defaults to first day of the current month. Change date, if desired (see Date Navigator).
   - **Post Date To**

     Date invoices were closed. Defaults to today and is non-editable.
   - **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). BUs are set in Business Units.
3. Click . RB9 lists all dates transactions were posted beginning with the starting date you specified. *(End Balance = Begin Balance + Increase R/P – Decrease R/P)*

   NOTE: Pay amounts from voided invoices may be included

   Voided invoices are included in the results if their pay amount was set to "Not to void Resource Pay" when the invoices were voided (see Voiding invoices). The pay amount for those voided invoices is added to the Increase R/P column and is removed from the Decrease R/P column.
4. Click a hyperlinked date to see details. In the View Liability Log window, the selected day's transactions are broken out and grouped according to type.

Reference

- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Voiding invoices

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 in the Lookup Firm popup. 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 . RB9 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** drop-down, 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** drop-down. (Methods 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** drop-down.

- ### 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

- Others lists

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 (see Date Navigator).
   - **Firm**

     Click to select a firm in the Lookup Firm popup. See Looking up firms.
   - **Contact**

     Click to restrict search to one contact's cases in the Lookup Contact popup. 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 . RB9 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 (see Date Navigator).

   - **Firm**

     Click to select a firm in the Lookup Firm popup. 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 drop-down.

   - **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 . RB9 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
- Others lists

Step-by-step instructions

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

Analyzing your business

RB9 Standard only

Get an instant snapshot of your business. Compare the current month-, quarter- and year-to-date totals to the previous period. Get total amounts for any period of time.

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.

- **Party Type**

  Sold To – Default. Clients ordering the services.

  Bill To – Clients 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 Parent – Multi-office firm which 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, select the state in the Lookup Party's State popup to break out that information (see Lookup panel).

- **Case**

  Leave blank unless you are analyzing business for a particular case. To select a case, see Looking up cases.

- **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). BUs are set in Business Units.

2. View results

1. Click . RB9 displays a snapshot of the billed services that meet the specified search condition(s), broken down into number of units sold, billed rush charges, billed amounts, pay amounts, voided/credited, and gross profits 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. RB9 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, RB9 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

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

Step-by-step instructions

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

Producing gross profit reports

RB9 Standard only

This report lists the gross profit (in amount and percentage) for each invoice. Gross profit is the difference between the invoice amount and the resource cost.

1. Set parameters

1. **Reports > Gross Profit**
2. In the **Search By** pane, specify the following search filters:

- **Date Type**
  - **Job Date** – Default. Displays invoice amounts for jobs scheduled to take place during the date range.
  - **Invoice Date** – Displays invoice amounts for jobs billed during the date range.
  - **Post Date** – Displays invoice amounts for invoices posted during the date range.
- ***Date From/*Date To**

  Required. Works with **Date Type.** Enter a date range. See Date Navigator.
- **Group By**
  - **Sold To Firm** – Default. Firm that ordered the services on the invoice.
  - **Bill To Firm** – Firm responsible for paying the invoice for the services.
  - **Ordering Firm** – Firm that ordered the billed job.
- **Sold To Parent Firm/Bill To Parent Firm/Ordering Parent Firm**

  Leave blank unless you want to analyze the gross profit for (subsidiary) firms that belong to a particular parent firm.
- **Sold To Firm/Bill To Firm/Ordering Firm**

  Leave blank unless you want to analyze the gross profit for a particular firm.
- **Case**

  Leave blank unless you want to analyze the gross profit for a particular case. To select a case, see Looking up cases.
- **Number of Top Clients**

  Enter the number of clients you want to limit from the top. Leave blank to show all clients.

- **Show Detail**
  - **Yes** – Default. Shows each client's gross profit broken down by invoice.
  - **No** – Summarizes each clients' information into one line.
- **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). BUs are set in Business Units.

2. **View results**

   Click . RB9 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.

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.

Reference

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

Step-by-step instructions

- Printing invoices, statements & reports

Producing miscellaneous sales reports

RB9 Standard only

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. Set parameters

1. **Reports > Misc. Sales**
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.

- **Service Item Subgroup**

  Only those service items belonging to the selected subgroup appear in the **Lookup Service Items** panel.

- **Service Items**

  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.)

- **Sold To Parent Firm**

  Multi-office firm headquarters which ordered services.

- **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**
  - **Yes** – Default. Will present results grouped by contacts.
  - **No** – Will 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 invoices tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. **View results**

   Click . RB9 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.

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.

Reference

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

Step-by-step instructions

- Printing invoices, statements & reports

Producing client rating reports

RB9 Standard only

This report lists all invoices (starting with O&1), grouped and subtotaled by client. Sorting this list by amount can generate a holiday gift list. Each client is listed with the original amount, copy amount, and payment history.

1. Set parameters

1. **Reports > Client Rating Report**
2. In the **Search By** pane, specify the following search filters:

- ### Post Date From/Post Date To

  Enter an invoice date range. See Date Navigator. Invoices posted for the specified period will be summarized.

- ### Group By

  - **Sold To** – Default. Firm that ordered service items.
  - **Bill To** – Firm that is paying the invoice.

- ### Sold To Parent Firm/Bill To Parent Firm

  Leave blank unless you want to analyze the rating for (subsidiary) firms that belong to a particular parent 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

  - **Yes** – Default. Shows amounts attributable to contacts within firms.
  - **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). BUs are set in Business Units.

2. **View results**

   Click . RB9 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.

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.

Reference

- Date Navigator
- Parent Firms
- Sold To vs. Bill To
- Lookup panel
- Accounting lists
- Business Units

Step-by-step instructions

- Printing invoices, statements & reports

Producing insurance billing reports

RB9 Standard only

This report lists each invoice billed directly to an insurance company (or other third party), grouped and subtotaled by client and insurance company.

1. Set parameters

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 summarized.

   - **Bill To Parent Firm**

     Leave blank unless you want to analyze the third-party billing for (subsidiary) firms that belong to a particular parent firm.

   - **Bill To Firm**

     Leave blank unless you want to analyze the third-party billing 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.

   - **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). BUs are set in Business Units.

2. View results

Click . RB9 lists all of the invoices that meet the specified search condition(s) as a report, 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.

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.

BEST PRACTICES

When insurance companies ask for a report that breaks down their invoices by law firm and attorney, provide this report.

Reference

- Date Navigator
- Parent Firms
- Lookup panel
- Accounting lists
- Business Units

Step-by-step instructions

- Printing invoices, statements & reports

Producing resource production reports

RB9 Standard only

View all invoices (including the page count) generated for a specific period, grouped and subtotaled by resource. Print out office copies and resource copies (which exclude invoice amounts).

1. Set parameters

1. **Reports > Resource Production**
2. In the **Search By** pane, specify the following search filters:

- **Date Type**

  Post Date – Default. Invoices posted for the specified period will be summarized.

  Job Date – Shows invoices based on the invoice's related job date.

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

  Required. Works with **Date Type.** Default is today. Enter a date range. See Date Navigator.

- **Resource**

  Leave blank unless you want to analyze the production for a particular resource. To see report for a single resource, see Looking up resources.

- **Resource's City**

  Enter a city name to see which resource is producing the most in that city.

- **Original/Copy**

  Default is ALL. Select Original Only to restrict search to originals. Select Copy Only to restrict search to copies.

- **Type**

  Default is Office Copy. Select Resource Copy to produce report without invoice totals.

- **Show Detail**

  Default is Yes. Slide to No to print the report in summary format.

- **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). BUs are set in Business Units.

2. **View results**

   Click . RB9 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.

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.

Reference

- Lookup panel
- Business Units

Step-by-step instructions

- Printing invoices, statements & reports

Producing original production reports

RB9 Standard only

View all jobs (including the page count) produced for a specific period, grouped and subtotaled by resource.

1. Set parameters

1. **Reports > Original Page Production**
2. In the **Search By** pane, specify the following search filters:

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

     Required. Enter a date range to see number of transcript pages produced in a specific time frame. Default is today.

   - **Resource**

     Leave blank unless you want to analyze the production for a particular resource. To see report for a single resource, see Looking up resources.

   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. View results

Click . RB9 summarizes all of the jobs 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.

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.

BEST PRACTICES

If you pay incentives to resources that produce more than certain number of pages per month, use this report to get the totals you need.

Reference

- Lookup panel
- Business Units

Step-by-step instructions

- Printing invoices, statements & reports

Producing turnaround analysis reports

RB9 Standard only

This report summarizes by resource how quickly they turn around jobs on average for the specified period.

1. Set parameters

1. **Reports > Task Turnaround Analysis**
2. In the **Search By** pane, specify the following search filters:

- **Date Type**

  Order Date – Default. Select tasks for report based on job's scheduled date or when transcripts were ordered by the client for a previously billed job.

  Turn In/Completed Date – Select tasks for report based on when they were completed by the resource.

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

  Required. Works with **Date Type.** Default is today. Enter a date range. See Date Navigator.

- **Resource**

  Leave blank unless you want to analyze the turn-around time of a particular resource. To see report for a single resource, see Looking up resources.

- **Task**

  Parts of jobs requiring separate resources. Default is ALL. Click to restrict search to specific tasks (see Lookup panel). Task options are set in Lists > Jobs.

- **Show Detail**

  Yes – Default. Produces a list of all turned-in jobs grouped by resource.

  No – Produces a summary list showing number of tasks and average turnaround in days for each resource.

- **Business Units**

  Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. View results

Click . RB9 summarizes all of the tasks that meet the specified search condition(s)

grouped by resource as a report. The search criteria used to generate the report appear at the bottom of each page of the report above the timestamp.

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.

NOTE: Turnaround does not include weekends

Weekends are excluded in calculating the average days for completion.

Reference

- Lookup panel
- Jobs lists
- Business Units

Step-by-step instructions

- Printing invoices, statements & reports

Producing daily tracking summary

RB9 Standard only

Use the Daily Tracking Summary to list all jobs with completed steps within a specified period. Produce reports to document your day's progress.

1. View completed steps

1. **Reports > Daily Tracking Summary**
2. In the **Search By** pane, click to create report of all steps finished today. Or specify the following search filters before clicking :

   - **Level**
     - **Tracking Item** – Default. Displays all items in alphabetical order of their description.
     - **Tracking Step** – Displays only transcripts and includes steps completed.
   - ***Finished Date From/*Finished Date To**

     Required. Date range of completed steps.
   - **Manager**

     RB9 user responsible for overseeing the tracking item. Default is blank. To restrict results to one user, click , then in the Lookup User popup, find the person's name. See Searching in RB9.
   - **Tracking Item**

     Default is ALL.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. Export/print results

RB9 lists all of the jobs 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.

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

Reference

- Tracking
- Lookup panel
- Business Units

Step-by-step instructions

- Searching in RB9
- Printing invoices, statements & reports

Analyzing tracking productivity

RB9 Standard only

See how many tracking items have been finished on time, by item, step, manager, or resource.

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 Manager-Item** – Lists all tracking items assigned to managers, grouped by manager.
     - **By Assign-To Step** – Lists all tracking items and their steps assigned to resources, grouped by resource.
   - ***Finished Date From/*Finished Date To**

     Required. Completed tracking item date range.
   - **Show Quarterly**

     No – Default. View tracking item totals by years and months (in expanded view).

     Yes – 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 jobs tied to specific BUs (see Lookup panel). BUs are set in Business Units.

2. View results

1. Click . RB9 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 Manager:** *(If searched by manager-item)* All managers 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 resources 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. RB9 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

Importing entities from other systems

If you have an existing database of firms, contacts, and/or resources and a copy of *Microsoft Excel*, you can import the entries into RB9 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 RB9, the *Excel* spreadsheet must have the same column headers in the same order as the **Bulk Import** tool headers in RB9. 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
   - **Resources** – Resources 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.
   - **Resources template:**
     Full Name and/or **First Name** & **Last 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 resources, each entity should have only one email address.

2. Import into RB9

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.
     - **Resources** – For spreadsheets made with the Resources 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 RB9 after importing.
5. Click **Import.**
6. RB9 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 RB9 see Updating contacts, Updating firms, and Updating resources.

IMPORTANT: RB9 does not check entries for duplicates

When importing entities, RB9 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
- Resources
- Microsoft Excel
- Firms Excel template

- Firms with Contacts Excel template
- Resources Excel template

Step-by-step instructions

- Updating contacts
- Updating firms
- Updating resources
- 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** drop-down.
3. Select the field you want to update in the **Choose field to update** drop-down:
   - **Account Status**

     Default. To change the actionable financial status of the firms, such as COD or bankrupt. Account statuses 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 are set up in Lists > Firms.
   - **Client Of**

     To change the resource the firms belong to.
   - **COD**

     To designate the firms as Cash on Delivery or not.
   - **Collector**

     To change the resource 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 Entering billing & pay rates.

- **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 Type and its 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 RB9 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.

- **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 up 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 up 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 drop-down.

   - **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 drop-down.

   - **Client Of**

     Click . To find the responsible resource you want to change to in the **Lookup Resource** panel, see Looking up resources.

   - **COD**

     Default is No. Slide to Yes if you want the firms to pay invoices in full upon delivery.

   - **Collector**

     Click . To find the resource you want to collect payments from the firms, see Looking up resources.

   - **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 drop-down.

- **Invoice Past Due in Days**

  Enter the number of business days past the payment terms of invoices for the firms to render payment before RB9 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 for the firms, see Looking up firms.

- **Payment Terms**

  Select the terms that will appear on invoices in the drop-down.

- **Rating**

  Select the credit rating you want to change the firms to in the drop-down.

- **Sales Rep**

  Click . To find the sales representative you want to change to, see Looking up resources.

- **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 drop-down.

- **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** drop-down:

     - **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 one organization, click . Then find the firms' headquarters in the **Lookup Parent Firm** panel. See Looking up firms.

     - **Sales Rep**

       When bulk updating sales reps only

       To search for firms by their assigned sales representative, click . See Looking up resources.

     - **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 . RB9 displays all the firms that fit the search criteria.

  3. Check the box in the **Results** header to select all firms in the grid, or check only the boxes of specific 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. RB9 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

- Firms
- COD

- Firms lists
- Parent Firms
- Accounting lists
- Billing Rates
- Resources
- Client Of
- Send Statements
- Sales Rep
- Lookup panel

Step-by-step instructions

- Entering billing & pay rates
- Looking up resources
- 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** drop-down.
3. Select the field you want to update in the **Choose field to update** drop-down:
   - **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 Of**

     To change the resource the contacts belong to.
   - **Contact Type**

     To change the category the contacts are classified by. Contact Type and its 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 up 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 up 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 Of**

     Click . To find the responsible resource you want to change to in the **Lookup Resource** panel, see Looking up resources.

   - **Contact Type**

     Select the category you want to change the contacts to in the drop-down.

   - **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 drop-down.

   - **Invoice Sending Method**

     Select the method for sending invoices to the contacts.

   - **Rating**

     Select the credit rating you want to change the contacts to in the drop-down.

   - **Sales Rep**

     Click . To find the sales representative you want to change to, see Looking up resources.

   - **Salutation**
     Select new terms of address for the contacts in the drop-down.

   - **Statement Sending Method**

     Select the method for sending statements to the contacts.

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** drop-down:

     - **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 one organization, click . Then find the firms' headquarters in the **Lookup Parent Firm** panel. 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 resources.

  2. Click . RB9 displays all the contacts that fit the search criteria.

  3. Check the box in the **Results** header to select all contacts in the grid, or check only the boxes of specific 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. RB9 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
- Accounting lists

- Billing Rates
- Resources
- Client Of
- Contacts lists
- Sales Rep
- Firms
- Parent Firms

Step-by-step instructions

- Looking up resources
- Looking up firms

Updating multiple resources at once

If you have a number of resources that need the same information changed, such as a group of resources whose pay group has changed, save time by changing all of the affected resources at once.

1. **Tools > Bulk Update**
2. In the Bulk Update window, select Resources in the **Entity** drop-down.
3. Select the field you want to update in the **Choose field to update** drop-down:

- **Commission Rate (When Covering)**

  For resources with their own clients (Client Of), the percentage for extra commission pay for their clients's jobs they cover.

  For sales reps (account executives), the percentage for sales commissions.

- **Commission Rate (When Not Covering)**

  For resources with their own clients, the percentage for extra commission pay for their clients's jobs someone else covered.

  For sales reps (account executives), the percentage for sales commissions.

- **Copy Term**

  Number of days from the invoice date before this resource is paid on copies.

- **Do not pay this resource**

  Resources, such as an owner or conference room, that are excluded from the pay process.

- **Original Term**

  Number of days from the invoice date before this resource is paid on originals.

- **Pay Group**

  Categories of time periods your company uses to pay resources, e.g., Monthly, Weekly, On Demand. Pay groups are set up in Lists > Resources.

- **Print 1099 Form**

  If you provide the resources with their federal 1099-NEC forms.

- **Priority Level**

  Order of preference or availability. Priority levels, including the default, are defined in Lists > Resources.

- **Resource Type**

  Profession(s) and/or other type of resource(s). Resource types and the default are defined in Lists > Resources.

- **Salutation**

  To change the terms of address used in letters or messages for resources, e.g., Mr. or Ms. Terms of address and default are set up in Lists > Resources.

- **Self Scope**

  Resources do their own scoping.

4. Selections in **Set value to** vary depending on the field you chose to update above. If you selected:

   - **Commission Rate (When Covering**

     Enter the percentage (e.g., "5.000") you want to change to for extra commission pay on covered jobs.

   - **Commission Rate (When Not Covering**

     Enter the percentage (e.g., "3.000") you want to change to for extra commission pay on jobs covered by other resources.

   - **Copy Term**

     Select a value in the drop-down or enter one in the field to set the number of days before the resources are paid for copies.

   - **Do not pay this resource**

     Default is No. Slide to Yes if you want to exclude the resources from the pay process.

   - **Original Term**

     Select a value in the drop-down or enter one in the field to set the number of days before the resources are paid for originals.

   - **Pay Group**

     Select the resources' new pay group in the drop-down.

   - **Print 1099 Form**

     Default is No. Slide to Yes if you want to print 1099-NEC forms for the resources.

   - **Priority Level**

     Select the resources' new order of preference or availability in the drop-down.

   - **Resource Type**

     Select the resources' new profession or other type of resource in the drop-down.

- **Salutation**

  Select new terms of address for the resources in the drop-down.

- **Self Scope**

  Default is No. Slide to Yes if you want to indicate that the resources do their own scoping.

5. Click **Next.**
6. In the **Update To** panel, choose one:

   - **All resources**

     To change every listing in Resources.

   - **All active resources**

     To change only those listings for resources that are still doing business with you.

   - **Specific resources**

     Default. To select a custom set of resources to update.

     1. Select a filter in the **Search By** drop-down:

        - **City**

          Default. To search for resources in one city, enter part of the city name in **Search Criteria.**

        - **State**

          To search for resources in one state or multiple states, click . Then select states in the **Lookup State** panel. See Lookup panel.

     2. Click . RB9 displays all the resources that fit the search criteria.
     3. Check the box in the **Results** header to select all resources in the grid, or check only the boxes of specific resources to update.

7. Click **Update.** If you selected the All resources option, an alert will appear asking if you mean to update every resource in your database. If so, click **Yes.**
8. RB9 updates the entries. Click **OK** in the operation successful popup that appears.

CAUTION: Update All means your entire resource database

Select the All resources choice in the **Update To** panel only when you want to update the field in every resource 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 resources in the **Results** grid in the **Update To** panel, check the box in the **Results** header to select them all then click **Update.**

Reference

- Resources
- Pay Group
- Client Of
- Sales Rep
- Resources lists
- Lookup panel

Step-by-step instructions

- Entering general resource information
- Entering pay information
- Entering general location information
- Entering general job information
- Entering additional job information

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** drop-down.
3. **Choose field to update** drop-down displays Location Type. Location types are categories of facilities where jobs take place, e.g., Hospital, Courthouse, or School. Location types and their default are set in Lists > Locations.
4. Select the location type you want to update locations to in the **Set value to** drop-down.
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** drop-down:
        - **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 . RB9 displays all the locations that fit the search criteria.
     3. Check the box in the **Results** header to select all locations in the grid, or check only the boxes of specific 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. RB9 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
- Locations lists
- Lookup panel

Updating multiple jobs at once

If you have a number of jobs that need the same information changed, such as a group of jobs that were set to the wrong job type, save time by changing all of the affected jobs at once.

1. **Tools > Bulk Update**
2. In the Bulk Update window, select Jobs in the **Entity** drop-down.
3. Select the field you want to update in the **Choose field to update** drop-down:
   - **Job Type**
     To change the category of jobs. Job types are set in Lists > Jobs.
   - **Sales Rep**
     To change the account executive or sales representative for the jobs. Sales representatives are set up in Resources.
4. Selections in **Set value to** vary depending on the field you chose to update above. If you selected:
   - **Job Type**
     Select a category in the drop-down. Job categories and list default are set in Lists > Jobs.
   - **Sales Rep**
     Click .To find the sales representative you want to change to in the **Lookup Resource** panel, see Looking up resources.
5. Click **Next.**
6. In the **Update To** panel, **Search By** defaults to *Job Date. In **Search Criteria** fields, enter or select dates in the Date Navigator for Job Date From and Job Date To *(required).*
7. To further restrict results, select a filter in the next drop-down:
   - **(blank)**
     Default. If you want to see all jobs within the date range selected.
   - **Case**
     To restrict results to jobs from a single case. See Looking up cases.
   - **Ordering Firm**
     To restrict results to jobs from a single firm. See Looking up firms.

- **Ordering Contact**
  To restrict results to jobs from a single contact. See Looking up contacts.

- **Sales Rep**

  When bulk updating sales reps only

  To search for jobs by the assigned sales representative, click . See Looking up resources.

8. Click . RB9 displays all the jobs that fit the search criteria.
9. Check the box in the **Results** header to select all jobs in the grid, or check only the boxes of specific jobs to update.
10. Click **Update.** Then click **OK** in the popup that appears.

Reference

- Jobs
- Jobs lists
- Sales Representative
- Resources
- Accounting lists
- Date Navigator

Step-by-step instructions

- Looking up resources
- Looking up firms
- Looking up contacts
- Looking up cases

Managing tags

RB9 Standard only

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 drop-down.
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.
  - **Resources**

    Enter a partial/full name in **Resource Name** to search for specific resources.
  - **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 (see Best Practices below) appear in the **Tag** drop-down automatically. Select the tag name or type a partial/full tag name in the field if the tag was manually entered in entities.

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 all selected entities**

  Click **Add Tag.** Then in the Add Tag popup, select a tag in the ***Tag** drop-down or enter a new tag *(required).* Then click **Save.**

- **Remove the tag from all selected entities**

  Click **Remove Tag.** In the popup that appears, click **Yes.**

- **Email selected entities**

  Click **More > Send Email.** See Composing emails & text messages.

- **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.

BEST PRACTICES: Set up tags to share

Tags that are entered as text in **Tag** fields are saved in the entities where they were entered: They will not appear in any **Tag** drop-down. To have tags appear in drop-downs, set them up in Lists > Firms, Lists > Contacts, Lists > Resources, and Lists > Locations. Any tags entered in Tag Lists will be shared with the rest of your company.

Reference

- Tags
- Entities
- Firms lists
- Contacts lists
- Resources lists
- Locations lists

Step-by-step instructions

- Organizing with tags
- Composing emails & text messages
- Printing envelopes
- Printing labels
- Exporting & printing results

Creating/updating forms & letters

Edit included RB9 forms. Import forms from other applications to use. Insert headers, footers, and tables. Add RB9 data fields. Format everything to match your needs and corporate culture. Any edits you make are saved system-wide in the form.

TIP: You don't have to start from scratch to create forms

If you don't want to change an existing form, copy it and make changes to the new form.

Modify an RB9 form and save it as a new form. Or create new forms from scratch. New forms are saved on the RB9 server and are available to all of your RB9 registered users.

1. Select the form category

1. **Tools > Form Templates**
2. In the left pane of the Form Templates window, select the form category or subcategory (Form Group) of an existing form you are going to update or for the new form you are going to create.

2. Add/select form template

1. RB9 displays all existing forms in the category/form group selected in the Form Templates window's results pane. 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**
     - Hyperlinked **Form Name.** 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/panel, enter a name for the form *(required).*
2. In the New Form/Edit Form window, click a tab to access tools to customize the form. See Editing forms & letters.

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, RB9 automatically saves your work at regular intervals in Edit Form windows while you are working.

Reference

- Form Groups

Step-by-step instructions

- Editing forms & letters

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 RB9 data fields to form templates. RB9 automatically saves your work at regular intervals.

Edits to form templates are saved systemwide and are available to all of your RB9 registered users. Edits to active forms are one-off changes — they are not saved in the system.

Continued from Creating/updating forms & letters.

In the New Form/Edit Form/preview form window, click a tab to access tools to customize the form:

- **File**

  To perform basic template 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.

- **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**

  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 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 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, print your templates, and move templates within a category.

Continued from Editing forms & letters.

In the New Form/Edit Form window, click **File >:**

- **Import**
  To add an existing document (.doc, .docx, .pdf, .tx, .txt formats) to your form, select the document from your computer. RB9 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 drop-down, then click **Save.**

- **Print**
  To print the template, set options and print from the browser's print screen that appears.

- **Properties**
  To move the template:
  - **To a different Form Group,** select the new subcategory in the **Form Group** drop-down in the **Properties** panel, then click **Save.**
  - **From a Form Group to its main category,** select the blank option in the **Form Group** drop-down in the **Properties** panel, then click **Save.**

Reference

- Form Group

Step-by-step instructions

- Batch printing assignment notifications/cancellations
- 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.

Continued from Batch printing assignment notifications/cancellations, Updating forms for hybrid job locations, Updating forms for separate task times, or Editing forms & letters.

In the New Form/Edit Form window, **Home** is the default view. Select text to change/format, then select:

- **Clipboard**
  -

Use Local Clipboard

    If you want to add something to your template that you copied from a file in another program, this button must be highlighted, then paste using your browser's Paste command.

  -

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.)*

  -

Cut

    Selected template contents will be deleted from its current location in the form and saved to the clipboard to be pasted elsewhere.

  -

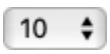
Copy

    Selected template contents will be copied, not deleted, and saved to the clipboard to be pasted elsewhere.

- **Font**
  -

[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**
  - **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.

- **Strikethrough**

  Draw a line through the selected text.

- **Subscript**

  Move the selected text down half a line.

- **Superscript**

  Move the selected text up half a line.

- **Change Case**
  - **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 drop-down; then select/enter values for a

custom color in the Text Background Color popup and click **OK.**

- **Font Color**

  Select a color in the default palette as the color for the selected text. To use a custom color, click **More Colors...** in the drop-down; then select/enter values for a custom color in the Text Color popup and click **OK.**

- **Paragraph**

  - **Bullets**

    Select one of the default bullet types to mark each paragraph of selected text. Or click **Format List...** in the drop-down; then select/enter values to customize the list appearance in the Bullets and Numbering popup and click **OK.**

  - **Numbering**

    Select one of the default numbering styles to mark each paragraph of selected text. Or click **Format List...** in the drop-down; then select/enter values to customize the list appearance in the Bullets and Numbering popup and click **OK.**

  - **Multilevel List**

    Select one of the default indent and numbering styles to format paragraphs of selected text. Or click **Format List...** in the drop-down; then select/enter values to customize the list appearance in the Bullets and Numbering popup and click **OK.**

  - **Decrease Indent**

    Move the selected text out to the margin in increments. (Will not extend past the margin.)

  - **Increase Indent**

    Move the selected text in from the margin in increments.

  - **Left-To-Right Text Direction**

    Default. Text is flush left, reads left to right.

  - **Right-To-left Text Direction**

    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. You can also click on the horizontal ruler at the top of the form to add tabs to selected text, click and drag tabs to change their location, drag tabs off the ruler to delete them.

  - **Show/Hide Control Characters**

    Toggle control characters (format indicators 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**

  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 for how much space each line of the selected text occupies vertically.

- **Borders**

  Select border location(s) in the drop-down for the text area of selected text.

- **Back Color**

  Select background color in the drop-down for the text area of selected text. To use a custom color, click **More Colors...** in the drop-down; then select/enter values for a custom color in the Background Color popup and click **OK.**

- **Frame Color**

  With border location(s) selected for the text area in **Borders,** select their color in the default palette. Or to use a custom color, click **More Colors...** in the drop-down; then select/enter values for a custom color in the Frame Line Color popup and click **OK.**

- **Frame Line Width**

  With border location(s) selected for the text area in **Borders,** select their line width in the drop-down.

- **Styles**

  -

Styles

    If you imported a document for your template, RB9 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, click **Manage Styles**

at the end of the list. Then modify an existing style or create a new one in the Styles popup.

- **Editing**
  - Undo **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 **Redo**

    Reverse the last **Undo** made. Continue clicking **Redo** to step forward restoring changes made to the template since it was last saved.

  - Find... **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.** RB9 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... **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.

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

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- Updating forms for separate task times
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- Editing form Data Fields options
- Editing form Table Tools options
- Editing form Frame Formatting 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 Batch printing assignment notifications/cancellations or Editing forms & letters.

In the New Form/Edit Form window, click **Insert:**

- **Pages**
  - **Blank Page**

    Add a page at the end of the form.
  - **Page Break**

    Start a new page in the form where the cursor is inserted in the form.
- **Tables**
  - **Table >**

    In the **Insert Table** drop-down, 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.

    You can edit the table on the form using Table Tools.
- **Illustrations**
  - **Image**

    Insert an image file (.jpg, .png, .bmp, .tif formats) where the cursor is inserted in the form.
  - **Shapes >**

    Select a shape type, then click on the form to add a default shape, or click and drag across the form to create a custom-sized shape.

  To modify the illustration:
  - Change its size by clicking and dragging one of the white squares on the edges of the illustration.
  - Move it anywhere in the form by clicking and dragging it.

- Edit the illustration, including how it interacts with text on the form, using Frame Formatting.

- **Links**

  - **Hyperlink >**

    Insert Hyperlink – To add a link to a web page (start with http:// or https://) or email address (start with mailto:).

- **Headers & Footers**

  - **Header >**

    Edit Header – To add content to page headers

  - **Footer >**

    Edit Footer – To add content to page footers

  - **Page Number >**

    Insert Page Number – To add page numbers to the open header or footer.

  You can edit the contents in the header/footer using the tools in Home, Insert, and Data Fields.

- **Text**

  - **Text Frame >**

    Insert Text Frame – To create a text box in the form, select this, then click and drag area for text.

    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**

  - **Symbol >**

    [Special symbols] – Click a symbol to insert it into the form where the cursor is.

    Format the appearance of symbols using the tools in Home.

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Editing form Page Layout options

Form Templates' Layout options let you set margins, orientation, paper size, columns, content breaks, simple backgrounds, and paragraph spacing.

Continued from Batch printing assignment notifications/cancellations or Editing forms & letters.

In the New Form/Edit Form window, click **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 drop-down.
- **Columns & Breaks**
  - **Columns >**

    Select how many columns of text appear on a page from the default listing. Or if you want more columns, or to customize the spacing between columns, click **More Columns...** Then make selections and/or enter amounts in the Page Setup popup's **Columns** tab. Then click **OK.**
  - **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 drop-down 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 drop-down; then select/enter values for a custom color in the Background Color popup and click **OK.**

  - **Frame >**

    Select frame location(s) in the drop-down 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 drop-down; then select/enter values for a custom color in the Frame Line Color popup and click **OK.**

  - **Frame Width >**

    With frame location(s) selected for the page in **Frame >,** select their line width in the drop-down.

- **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.

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.

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- Editing form Frame Formatting options

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 Batch printing assignment notifications/cancellations or Editing forms & letters.

In the New Form/Edit Form window, click **View:**

- **Zoom**
  - **Zoom >**
    Select a percentage 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**

- **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 only the frame anchor control character in form on and off.

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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 Batch printing assignment notifications/cancellations or Editing forms & letters.

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 drop-down 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 drop-down; then select/enter

values for a custom color in the Frame Line Color popup and click **OK.**

- **Background Color >**

  Select background color in the drop-down for the selected table areas. To use a custom color, click **More Colors...** in the drop-down; 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 drop-down.

- **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.

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Editing form Frame Formatting options

If your form has graphics in it, such as your company logo, use Form Templates' Frame Formatting options to customize the look of the graphics in your forms.

Continued from Batch printing assignment notifications/cancellations or Editing forms & letters.

In the New Form/Edit Form window, click to select an illustration (image or shape) you want to customize. (If necessary, drag the illustration to where you want it on the template.) Then click **Frame Formatting:**

- **Arrange**
  - **Wrap Text >**
    - **In Line with Text** – Moves the illustration to the left of the column, lines up the bottom of the illustration 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.
    - **Top and Bottom** – Illustration remains where it was placed, any text that overlaps it is moved below the illustration.
    - **Square** – Illustration remains where it was placed, any text that overlaps it is moved to the left, right and below the illustration to frame it on all sides.
    - **Behind Text** – Illustration remains where it was placed, any text that overlaps it is moved in front of the illustration.
    - **In Front of Text** – Illustration moves in front of any text that overlaps it.
    - **More 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. Then click **OK.**
  - **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.

- **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.

- **Frames & Background**

  (For shape illustrations only)

  - **Line Color**

    With the shape selected, select their outline color in the default palette. Or to use a custom color, click **More Colors...** in the drop-down; then click **Other** in the Drawing Layout popup and select/enter values for a custom color in the Color popup, then click **OK.** Click **OK** again in the Drawing Layout popup.

  - **Background Color**

    With the shape selected, select their fill color in the default palette. Or to use a custom color, click **More Colors...** in the drop-down; then click **Other** in the Drawing Layout popup and select/enter values for a custom color in the Color popup, then click **OK.** Click **OK** again in the Drawing Layout popup.

  - **Line Width**

    With the shape selected, select their outline width in the drop-down. Or select No Frame Line for a shape without an outline.

  - **Transparency**

    With the shape selected, select an amount of transparency in the drop-down for the background color.

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.

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Updating forms for hybrid job locations

If you schedule Zoom meetings via RB9 make sure you have added both physical location fields and Zoom meeting fields to notification forms so Zoom information will be included in Job Confirmations/Cancellations and Assignment Notifications/Cancellations. Add subheads to the PDF forms to help your clients and resources find this important information.

1. Add necessary merge fields to correspondence

Insert URL related merge data fields in both the email and PDF templates of the job and assignment notices to share Zoom meeting information.

- ### In System Preferences

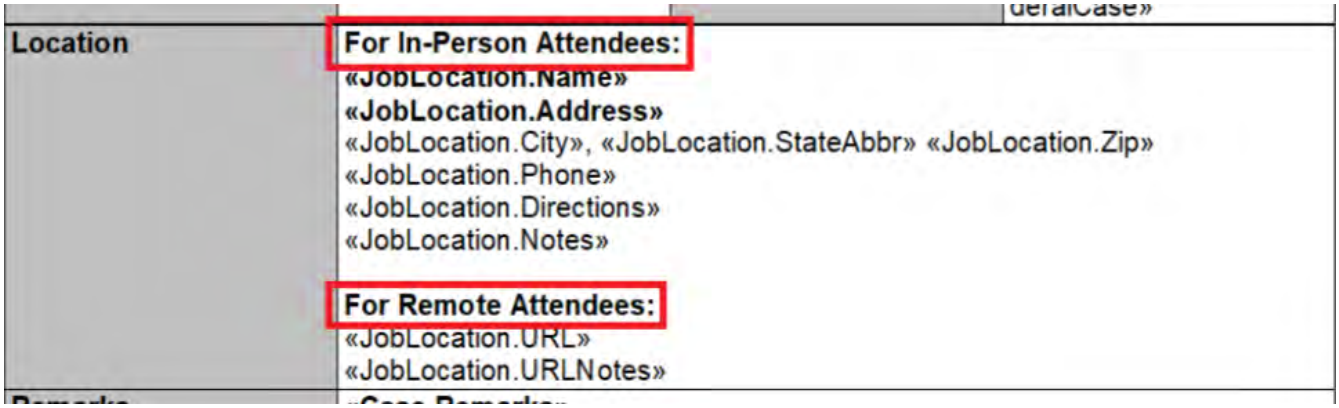
  1. **Setup > System Preferences**
  2. Click **Calendar** then click **Assignment Cancellation.**
  3. Click **Edit.**
  4. Click in the **Email Message** section where you want to insert Zoom meeting information.
  5. Click , then **JobLocation > URL.**
  6. Repeat steps 4 & 5 for **URLNotes.**
  7. Click **Save.**
  8. Repeat for **Assignment Notification, Job Cancellation,** and **Job Confirmation.**

- ### In Form Templates

  1. **Tools > Form Templates**
  2. Click **Assignment Cancellation.**
  3. Click **> Edit** next to the first template. Or click the template name then click **Edit** in the View Form screen.
  4. Click in the form's **Location** section where you want to insert Zoom meeting information.
  5. Click **Data Fields** above the form.
  6. Click **Insert Data Field** then **JobLocation > URL.**
  7. Repeat steps 4–6 for **URLNotes.**

8. Click **Save.**
9. Repeat for **Assignment Notification, Job Cancellation,** and **Job Confirmation.**

2. Add headers to form templates



Location	**For In-Person Attendees:** **«JobLocation.Name»** **«JobLocation.Address»** «JobLocation.City», «JobLocation.StateAbbr» «JobLocation.Zip» «JobLocation.Phone» «JobLocation.Directions» «JobLocation.Notes» **For Remote Attendees:** «JobLocation.URL» «JobLocation.URLNotes»

Recommended additions to Location section on form templates

1. If not already in the Edit Form screen follow steps 1–3 above.
2. Click in the form's **Location** section where you want to insert the "For In-Person Attendees:" header.
3. Enter the header text and style it as desired using the formatting tools in the **Home** tab above the form. (For styling instructions see Editing form Home options.)
4. Repeat steps 2–3 for the "For Remote Attendees:" header.
5. Click **Save.**
6. Repeat for **Assignment Notification, Job Cancellation,** and **Job Confirmation.**

NOTE: Change all affected forms

If you have more than one version of any of the 4 notices be sure to insert the data fields and subheads into all versions that could be used for Zoom meetings.

Reference

- Jobs

Step-by-step instructions

- Creating/updating forms & letters
- Scheduling Zoom meetings
- Customizing communications
- Editing form Data Fields options
- Editing form Home options

Updating forms for separate task times

If you use separate start and end times for tasks vs. their jobs, update the assignment related email and PDF forms to share accurate task times with assigned resources.

1. Add necessary merge fields to correspondence

Insert task start/end time merge data fields in the **Email Message** for Assignment Cancellations and Assignment Notifications.

1. **Setup > System Preferences**
2. Click **Calendar** then click **Assignment Cancellation.**
3. Click **Edit.**
4. Click in the **Email Message** section where you want to insert task start time.
5. Click [=] , then **Task > StartTime.**
6. Repeat steps 4 & 5 for **EndTime.**
7. Click **Save.**
8. Repeat for **Assignment Notification.**

TIP: Include task times where they work for you

In addition to the **Email Subject** field, you can insert the task time merge data fields in **Email Message, SMS Subject, SMS Message, iCal Subject,** and **iCal Description.** You do not have to insert the fields into every one of these options. Balance the information priority with the space restrictions of each option. For example, don't add the fields to the **SMS/iCal Subjects** to keep their subject lines short.

2. Add task time section to form templates

Scheduled Date	«Task.OrderDate»
Job Time	«Job.StartTime» «Job.Timezone»
Task Time	«Task.StartTime» ~ «Task.EndTime»
Notation	«Job.Notation»

Suggested layout for added task times

1. **Tools > Form Templates**
2. Click **Assignment Cancellation.**
3. Click **> Edit** next to the first template. Or click the template name then click **Edit** in the View Form screen.
4. If the form has a "Time" section, rename it "Job Time."
5. Click in the "Job Time" section or anywhere in the form where you want to insert task times.
6. Click **Table Tools** above the form.
7. Click **Insert Below** to add a row for task times below the insertion point.
8. Enter **Task Time** as the header.
9. Click in this new section where you want to insert task time data fields.
10. Click **Data Fields** above the form.
11. Click **Insert Data Field** then **Task > StartTime.** Repeat for **EndTime.**
12. To style the new section click **Home** above the form and use the formatting tools. (For styling instructions see Editing form Home options.)
13. Click **Save.**
14. Repeat for **Assignment Notification.**

NOTE: Change all affected forms

If you have more than one version of Assignment Notification or Assignment Cancellation form templates be sure to insert the task time section and data fields into all versions that might include task times.

Reference

- Task definition
- Send Assignment Notifications/Cancellations

Step-by-step instructions

- Creating/updating forms & letters
- Customizing communications
- Editing form Data Fields options
- Editing form Home options
- Notifying resources individually

  Sending batch assignment notifications/cancellations

Form Groups

RB9 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.

Step-by-step instructions

- Organizing with form groups
- Creating/updating forms & letters

Organizing with form groups

If you have too many forms in a single form template category, add subcategories to Form Templates' default categories. Then save forms to these Form Groups so they are easier to locate.

1. Add a form group

1. **Tools > Form Templates**
2. In the left pane of the Form Templates window, all existing categories and subcategories (Form Groups) are listed. Select the category that you want to add a form group to.
3. RB9 displays the forms in the category selected in the Form Templates' results pane. To create a new group, click **More > New Group.**
4. In the New Form Group window, enter a name for the form group in ***Group** *(required).*
5. Click **Save.**

2. Add forms to a form group

Click the form group name in the left pane of the Form Templates window.

- **If creating a new form:**
  1. Click **New.**
  2. In the New Form window, enter a name for the form *(required).* To create the form, see Creating/updating forms & letters.
- **Moving an existing form:**

  The form you want to move must be in the same general category or a Form Group in the same category as the destination Form Group.

  1. Click the form's hyperlinked name in the Form Templates' results pane.
  2. In the View Form window, click **Edit.**
  3. In the Edit Form window, click **File > Properties.**
  4. In the **Properties** panel, select the desired **Form Group** in the drop-down, then click **Save.**

TIP: Clean up your form groups

While you cannot delete the main form categories, you can delete form groups you created in any of the categories. To delete a form group, click the form group name in the left pane of the Form Templates window. Then click **More > Delete Group** and click **Yes** in the popup that appears.

Reference

- Form Groups

Step-by-step instructions

- Creating/updating forms & letters

Creating DYMO label templates

RB9 Standard only

Before printing DYMO labels out of RB9, set up DYMO label templates that will automatically include the recipient 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 RB9. 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 RB9, 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

Creating .label templates

RB9 Standard only

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 RB9. 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 RB9 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 RB9 Label Templates function. To upload your label template to RB9, see Managing label templates.

Reference

- Labels
- DYMO

Step-by-step instructions

- Creating DYMO label templates
- Setting up for online label printing
- Managing label templates

Creating .dymo templates

RB9 Standard only

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 RB9 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 RB9 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 RB9:
    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 RB9 Label Templates function. To upload your label template to RB9, see Managing label templates.

Reference

- Labels
- DYMO

Step-by-step instructions

- Creating DYMO label templates
- Setting up for online label printing
- Managing label templates

Managing label templates

RB9 Standard only

In addition to the included default label templates, you can add your own DYMO printer-compatible labels to use in RB9. 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 label templates are listed in the Label Templates window. To:

- ## Modify templates

  1. Check the box(es) of template(s) you want to modify.
  2. Click **Download.**
  3. Open the file on your device and edit the template.
  4. Save the template:
     - **With a new name to add as a new template** in RB9. To add the template, see Add templates.
     - **With the same name to replace the existing template** in RB9. You must delete the existing template before adding the replacement template (see Delete templates).

- ## Add templates

  1. 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.**

- ## Delete templates

  If you no longer need a template or want to replace it with a modified version, check the template's box and click **Delete.** Then click **Yes** in the popup.

Reference

- Labels
- DYMO

Step-by-step instructions

- Creating DYMO label templates
- Printing labels

Creating/updating notes templates

RB9 Standard only

Create templates of boilerplate text for different types of notes and edit saved templates. Notes templates are saved on the RB9 server and are available to all of your RB9 registered users.

Create as many templates as you want for certain notes fields in cases and jobs. Notes templates are organized into Notes Groups so that when selecting a template in a Notes field, only the relevant ones appear. For example, templates saved in the Cases-Remarks Notes Group will be available to select in the Remarks field in a case listing.

1. **Tools > Notes Templates**
2. In the left pane of the Notes Templates window, click to view all notes templates or click to narrow your search (see Lookup panel).
3. RB9 displays all existing templates that fit your search. To:

   - ### Create a notes template

     Click **New** in the Notes Templates' header.

   - ### View a notes template

     In the Notes Templates window, click the template's:

     - **> View**
     - Hyperlinked **Notes** name

   - ### Update an existing notes template

     In the Notes Templates window, click the template's:

     - **> Edit**
     - **> View** or the hyperlinked **Form Name.** In the View Notes Template window, click **Edit.**

   - ### Delete a notes template

     In the Notes Templates window, click the note's:

     - **> Delete**
     - **> View/Edit** or hyperlinked name. Then in the View Notes Template/Edit Notes Template window, click **Delete.**

     Click **Yes** in the popup that appears.

4. **If updating a notes template,** you can update the following information in the New

Notes Template/Edit Notes Template window:

- **Notes Group**

  Select the type of note you are creating a template for in the dropdown.

- ***Notes**

  Required
  Enter the template text. This is an unlimited text field.

  To customize the appearance of the notes, see Customizing notes & remarks.

5. Click **Save.**

Reference

- Notes Groups
- Lookup panel

Step-by-step instructions

- Adding boilerplate text to remarks & notes
- Customizing notes & remarks

Notes Groups

RB9 includes a set of categories that notes templates are organized into called **Notes Groups,** to make managing and using notes templates easier. Notes Groups are preset by RB9, you cannot edit or add new groups.

Notes Groups in RB9:

- Case-Remarks
- Job-Confirmation Notes
- Job-Production/Billing Notes
- Job-Resource Notification Notes
- Job-Scheduling Notes

Step-by-step instructions

- Creating/updating notes templates

Searching notes

RB9 Standard only

Search for notes by date, communication type, a word or phrase, or other parameters in RB9 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** drop-down:
   - **Case Notes** – Made in case listings.
   - **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.
   - **Job Notes** – Made in job listings.
   - **Location Notes** – Made in location listings.
   - **Resource Notes** – Made in resource listings.
   - **Tracking Notes** – Made in tracking listings.
   - **Witness Notes** – Made in witness listings.
3. No specific filter is required, but you must use at least one of the search filters with the selected Notes Log:
   - ### 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 RB9 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. To restrict the search to particular ways notes were received, click *(not available if Tracking Notes is selected).* 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, most recent notes first.
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

Step-by-step instructions

- Making entries in notes logs
- Updating cases
- Updating contacts
- Updating firms
- Recording collections efforts
- Adding billing information to invoices
- Scheduling jobs
- Updating locations
- Updating resources
- Updating tracking
- Adding witnesses
- Sorting rows
- Exporting & printing results

Tracking inhouse and online repository access

RB9 Standard only

In addition to complying with general security rules for business applications, tracking repository access is useful to see which clients and resources are using your RB Connect, and which files they are downloading. (Set up RB9 for tracking first. See note below.)

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**

     Default is Contact. Can also select Resource or User. 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.

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 hyperlinked name.

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 RB9 to record download activity

To start the logging process, go to Setup > System Preferences > Production > Repository and select **Repository Logging.** In the **Production – Repository Logging** panel, click **Edit,** then check the 3 **Log download activity...** boxes to have RB9 record usage of repository files. Click **Save.**

TIP: Help contacts track their own usage

When you check the **Log download activity for contacts** box in Setup > System Preferences > Production > Repository > Logging, your contacts can also see their download activity in RB 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
- RB Connect
- Resource
- User
- Lookup panel
- Date Navigator
- Repository preferences

Step-by-step instructions

- Exporting & printing results

Downloading backup files of your database

RB9 Standard only

If you want to have a backup file of your RB9 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. RB9 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

RB9 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 RB9 database backup to store on your premises.

Viewing email logs

RB9 Standard only

RB9 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 RB9 and cannot be edited.

1. **Tools > Email Log**
2. In the **Search By** pane of the Email Log window:
   - **Email Type**

     Defaults to Assignment Cancellation. Select the category of email you want to view in the drop-down.
   - **Recipient Email**

     To view emails associated with one email address only, click >
     - **Contact –** See Looking up contacts.
     - **Resource –** See Looking up resources.
   - **Sent Date From/Sent Date To**

     Click in these fields to enter a date or date range (see Date Navigator).
   - **Job No.**

     Restrict the search to a single job by entering its job number.
   - **Invoice No.**

     Restrict the search to a single invoice by entering its invoice number.
3. Click . RB9 displays all of the log entries that match the search criteria.
4. To view the sent email's details, click its hyperlinked **Log No.**

NOTE: Not all emails are logged by RB9

The only emails that are included in the Email Log are:

- Assignment Cancellation
- Assignment Notification
- Collection Letter
- Future Calendar
- Invoice
- Job Cancellation

- Job Confirmation
- Letter to Contact
- Letter to Witness
- Letter to Other
- Overdue Tasks Report
- Repository Notification
- Resource Pay Statement
- Statement
- Transcript Package Notification

IMPORTANT: Attachments are saved along with emails

When RB9 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
- Email Log preferences

Step-by-step instructions

- Looking up contacts
- Looking up resources

Viewing merged data histories

RB9 Standard only

When you merge a case/firm/contact/resource/location into another one, RB9 records the event. 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:
     - **Case** – To see all cases merged in the date range below.
     - **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.
     - **Resource** – To see all resources 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 . RB9 displays all of the merges that match the search criteria and includes when the entities were merged and by which RB9 user.
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, Resource Notes, or Location Notes searches. See Searching notes.

Reference

- Date Navigator
- Notes Finder

Step-by-step instructions

- Merging data
- Updating cases
- Updating contacts
- Updating firms
- Updating locations
- Updating resources
- Searching notes

Database

A **database** is a place where organized information is stored for a purpose. There are many types of databases; RB9 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 RB9

Common requests for information in RB9 are built in, and triggered by entering text and/or clicking buttons in the different windows in RB9. You don't need to know SQL for most information retrieval in RB9. You can make customized searches of your RB9 database, however, using Query Maker's SQL wizard.

To ask RB9'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.

Reference

- Database
- SQL

Step-by-step instructions

- Creating custom reports

Query Gallery

RB9 Standard only

Instead of creating a report from scratch in Query Maker, download one of the SQL queries published by RB9 developers to edit or use as is.

Reference

- SQL

Step-by-step instructions

- Using published queries

Creating custom reports

RB9 Standard only

If RB9's search critera do not include filters you want, make your own simple reports using any field(s) in a single table. For example, if you want to see all contacts in your RB9 database from several cities, specify search conditions, and RB9 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 RB9 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** drop-down of the Query Maker window, select the table that contains the fields you want to include in a report.
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 only the fields you want to appear.

1. In the **Conditions** pane, start a query by selecting a data field in the **Column** drop-down.
2. Choose a filter in the **Operator** drop-down.
3. Enter the unique condition you want to use with the operator in **Condition.**
4. Click **Execute.** RB9 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.

NOTE: View report using combined tables

Options in **Data Set** allow you to create reports from more than one table:

- The Firm+Contact data set combines the Firm and Contact tables so you can create reports using fields from both tables. With the Firm+Contact View, you can create a report listing all the contacts with the firm address instead of their home addresses, for example.
- The Invoices+Jobs+Cases data set combines the Invoices, Jobs, and Cases tables for reports. With the Invoices+Jobs+Cases View, you can run a query for invoices that includes associated case numbers, for example.

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

Setting multiple query conditions

RB9 Standard only

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 drop-down. Then click ▾ in the **)** column of the last of the priority conditions and select) in the drop-down.
5. Click **Execute.** RB9 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

RB9 Standard only

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

RB9 Standard only

Save time and reduce errors by re-using queries you and other RB9 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 RB9 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

RB9 Standard only

You don't have to start from scratch to generate reports. Save time by using queries made by RB9 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

- SQL

Step-by-step instructions

- Using previously-saved queries

Managing queries

RB9 Standard only

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

Preparing to use *QuickBooks Desktop* with RB9

RB9 Standard only

Before you can import RB9 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 RB9.

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 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 RB9. If you check this option, you can reuse the same connection to *QuickBooks* for all of the imported RB9 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 resource payroll checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Importing entities into *QuickBooks*

RB9 Standard only

Instead of entering contacts (customers in *QuickBooks)* and resources (vendors in *QuickBooks)* into both RB9 and *QuickBooks,* enter them once in RB9, 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 RB9 contacts or Vendors to import RB9 resources in the drop-down.
   - ***Entered Date From/*Entered Date To**
     Required. Default is today. Enter a date range.
4. Click . RB9 lists all of the entities that meet the search criteria.
5. Check the box in the header to select all of the entities displayed or check individual boxes to select specific 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

- QuickBooks preferences

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with RB9
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Importing resource payroll checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Importing invoices into *QuickBooks*

RB9 Standard only

There are several reasons to import your RB9 invoices into *QuickBooks.*

- If you operate multiple businesses and use *QuickBooks* to generate invoices for a business other than court reporting (e.g., a staffing business), you can import RB9 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 RB9.
- You can reprint RB9 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 drop-down.
   - ***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). BUs are set in Business Units.
4. Click . RB9 lists all of the invoices posted for the specified period.
5. Check the box in the header to select all of the invoices displayed or check individual boxes to select specific 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: RB9 fills in *QuickBooks* data

RB9 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

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with RB9
- Importing entities into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Importing resource payroll checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator

Importing resource payroll checks into *QuickBooks*

RB9 Standard only

Instead of printing resource payroll checks directly from RB9, 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 drop-down.
   - ***Pay Date From/Pay Date To**
     Required. Default is today. Enter a different pay date or date range (up to 7 days), if desired.
4. Click . RB9 lists all of the resources being paid in the specified payroll along with their check amounts.
5. Check the box in the header to select all of the resources displayed or check individual boxes to select specific resources.
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: RB9 fills in *QuickBooks* data

RB9 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.

TIP: Export checks from Payables

Instead of using the QuickBooks Integrator, you can export a QuickBooks IIF file from Print Checks to import into QuickBooks. See Exporting checks for *QuickBooks*.

Reference

- QuickBooks preferences

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with RB9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing credits & journal entries into *QuickBooks*
- Troubleshooting QuickBooks Integrator
- Exporting checks for *QuickBooks*

Importing payments into *QuickBooks*

RB9 Standard only

Instead of recording deposits manually in *QuickBooks,* you can import payment transactions directly from RB9, 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 drop-down.
   - ***Post Date From/Post DateTo**
     Required. Default is today. Enter the date or date range (up tp 7 days) payments were posted.
4. Click . RB9 lists all of the payments posted on the specified date.
5. Check the box in the header to select all of the payments displayed or check individual boxes to select specific 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

- QuickBooks preferences
- Business units

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with RB9
- Importing entities into *QuickBooks*

Importing invoices into *QuickBooks*

- Importing credits & journal entries into *QuickBooks*
- Importing resource payroll checks into *QuickBooks*
- Troubleshooting QuickBooks Integrator
- Selecting BU financial accounts

Troubleshooting QuickBooks Integrator

RB9 Standard only

If you encounter problems importing RB9 data into *QuickBooks,* check this list for possible remedies.

- ## Importing RB9 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 RB9 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 RB9, 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 RB9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing resource payroll checks into *QuickBooks*

Sending invitations to reporters

RB9 Standard only

Before you can apply reporters' digital signatures to RB-PDF Transcripts, reporters must grant you permission to use their digital signatures. Invite reporters to share their signatures with you.

1. Find reporters to invite

1. **Tools > Send Invitations for Signature Proxy**
2. In the **Search By** pane, no specific filter is required, but you must use at least one of the search filters:

   - **Name**

     To search by a resource name, select a filter:

     - **Full Name:** Default. Enter part of the resource's name in the field.
     - **First Name:** If using the default returns too many results, select First Name and enter part of the resource's given name (if a person) or part of the company name (if a business or other entity) in the field.
     - **Last Name:** If using the default returns too many results, select Last Name and enter part of the resource's surname in the field.

   - **City**

     Enter part of the name of a resource's city.

   - **State**

     Click to select a state or states in the Lookup State popup. See Lookup panel.

   - **Resource Type**

     Profession(s) and/or other type of resource(s). Resource types are defined in Lists > Resources.

   - **Priority Level**

     Order of preference or availability. Priority levels, including the default, are defined in Lists > Resources.

   - **Resource No.**

     Enter the entire resource number assigned by RB9 to a resource.

   - **Sent Date From/To**

     To view reporters you have already sent an invitation to, enter a date or date

range. See Date Navigator.

- **Show Active Only**

  Default is Yes. Leave as the default if you only want to see resources that you have designated as Active (see Entering general resource information). If you want to see all resources, slide to No.

3. Click . RB9 displays all the resources that fit the search criteria. To view/update a resource's information, click their hyperlinked name. See Updating resources.

2. Send invitations

1. Check the box in the results pane header to select all resources in the grid, or check only the boxes of specific resources to invite.

   NOTE: Some resources will not have a checkbox

   Resources that have already accepted your invitation or who do not have an email address on file will not have a checkbox.

2. Click **Send.**
3. To change any of the default settings for this emailing, see Emailing & texting from RB9. Otherwise click **OK.**
4. RB9 sends the email. Click **OK** again in the popup that appears when the email is sent.

Reference

- RB Digital Signature Proxy
- RB-PDF Transcripts
- Lookup panel
- Resources lists
- Date Navigator
- Email preferences

Step-by-step instructions

- Entering general resource information
- Updating resources
- Emailing & texting from RB9

Monitoring signature usage

RB9 Standard only

Track how many times you applied each reporter's digital signature to RB-PDF Transcripts in any time period.

1. Set parameters

1. **Tools > Signature Proxy Usage**
2. Click in the **Search By** pane to see usage in the current month, or use the Search By filters to restrict the results before clicking :

   - **View Option**

     By Month – Default. Displays signature proxy usage instances for each month.

     Detail – Displays as a static report each usage in chronological order.

   - **Date Type**

     Used Date – Default. Date a reporter's signature was applied by proxy.

     Job Date – Scheduled date of the job associated with the transcript.

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

     Required. Works with **Date Type.** Default is from the beinning of the current month to today. Change date range, if desired (see Date Navigator).

2. View usage

When viewing the interactive By Month report, RB9 lists all of the proxy usage instances that meet the specified search condition(s) as a report with totals for month, year, and grand total.

Click **Expand/Collapse > Collapse Date** to see only year and grand totals. For more information, see Using interactive reports.

Static Detail reports list usage incidents in chronological order and display more information than interactive reports. Click a hyperlinked **Job No.** to view its job details. See Updating jobs.

3. Export/print results

For By Month reports, see Exporting & printing results.

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

Reference

- RB Digital Signature Proxy
- RB-PDF Transcripts
- Date Navigator

Step-by-step instructions

- Using interactive reports
- Updating jobs
- Exporting & printing results
- Printing invoices, statements & reports

Finding network members

Look up other agencies and related businesses that use RB9. Find their contact information including contact name, driving directions to their offices, and their email address. Email them directly from within RB9.

1. **Tools > RB Network**
2. In the **Search By** pane, click ▾ in ***State** and select a state or province in the dropdown.
3. If desired, click ▾ in **City** and select a city in the selected state or province to further narrow your search resuts.
4. Click . All members that match the search criteria appear in the grid in alphabetical order.
5. Sort members by column by clicking a column header (see Sorting rows).
6. To view a member's details and contact them, click their **Agency Name.** In the View Agency window:
   - Click **> Google Maps/MapQuest Maps/Bing Maps** to view their location on a map in a new window and get directions.
   - Click ✉ to send an email to the contact. See Composing emails & text messages.
7. To print/export the list of members, see Exporting & printing results.

NOTE: Add your company to the roster

If you would like to make it easy for other RB9 users to contact you, enter your company details in Setup > System Preferences > Tools > RB Network.

Reference

- RB Network Preferences

Step-by-step instructions

- Sorting rows
- Composing emails & text messages
- Exporting & printing results

Entering general firm information

Enter basic firm information, including contact information and important warnings.

Continued from Adding firms to RB9 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 . RB9 will automatically populate the other address fields.

   - **Directions**

     Any information that would help someone find the firm's location easier

   - **Active**

     Yes is selected by default. When the firm is no longer scheduling jobs 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 RB9 and uneditable

   - **Firm Type**

     Category that best fits the firm. Firm Type is 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

- **Warning**

  Any important information that users should know about the firm when scheduling or invoicing jobs. This information appears in red under **Firm Warning** in ordering clients and parties in jobs, cases, and in **Invoice** panels in Turn In.

2. Click **Save.**

Reference

- Turn In
- Firms lists

Step-by-step instructions

- Adding firms to RB9
- Updating firms
- Searching firms
- Looking up firms

Entering additional firm information

Include billing details and notes for your calendaring and production/billing departments about firms.

Continued from Adding firms to RB9 or Updating firms.

1. In the **Additional** pane of an Edit Firm window, enter text or make selections:

- **Parent Firm**

  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, RB9 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 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 RB9 notifies you to start collection efforts. Default number of days comes from System Preferences > Entities > Firms.

- **COD**

  Slide to Yes to have RB9 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 drop-down:

  - **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 RB9 data, this field can be used to store the reference number (or customer number) that the accounting system has assigned for this firm.

- **Calendar Notes**

  Unlimited character count. Information about the firm resources should know for jobs for this firm. Text entered here appears on the Assignment Notification form in the optional Ordering Firm Calendar Notes data field. See Sending individual assignment notifications and Sending batch assignment notifications/cancellations.

  To customize the appearance of the notes, see Customizing notes & remarks. Text customizations will appear in Assignment Notifications sent to resources.

- **Production/Billing Notes**

  Unlimited character count. Information about the firm appears:

- In Edit Invoice panel for this firm in Turn In.
- On Production Sheets.

To customize the appearance of the notes, see Customizing notes & remarks.

2. Click **Save.**

Reference

- Parent Firms
- Firms preferences
- Notes Log
- Accounting lists
- COD invoices
- Send Statements
- Consoldated Invoices and Statements
- Production Sheets
- Turn In

Step-by-step instructions

- Adding firms to RB9
- Updating firms
- Searching firms
- Looking up firms
- Generating finance charges
- Setting up Service Item Master
- Sending individual assignment notifications
- Sending batch assignment notifications/cancellations
- Customizing notes & remarks

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 RB9 will use those addresses instead of the main firm address.

Continued from Adding firms to RB9 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 . RB9 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 . RB9 will automatically populate the other address fields.

2. Click **Save.**

Reference

- Turn In
- Firms lists

Step-by-step instructions

- Adding firms to RB9
- Updating firms
- Searching firms
- Looking up firms

Entering firm marketing information

Specify what type of firm an entity is for marketing and billing purposes.

Continued from Adding firms to RB9 or Updating firms.

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 are set up in Lists > Firms.

- **Rating**

  Firm's credit rating. Contacts at a firm can have different credit ratings than their firms. (See Entering contact marketing information.) Rating types are set up in Lists > Firms.

- **Source**

  How the client heard of you. Sources are set up 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 Of**

  If this client belongs to a specific resource, click to find and select that resource. See Looking up resources.

- **Sales Rep**

  If this client belongs to a specific sales representative/account executive, click to find and select that resource. See Looking up resources.

- **Billing Rate Group**

  Select a set of rate tables to use for this client in the drop-down. Firms must be connected to a Billing Rate Group. Billing Rate Groups are created in Lists > Accounting.

- **Billing Rate**

  Specific rate table in the selected **Billing Rate Group** to use for this firms. Billing Rates are set up in Setup > Billing Rates.

- **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

- Firms lists
- Date Navigator
- Client Of
- Sales Rep
- Billing Rate Groups
- Accounting lists

Step-by-step instructions

- Adding firms to RB9
- Updating firms
- Searching firms
- Scheduling jobs
- Entering contact marketing information
- Looking up resources

Recording collections efforts

If a client is in arrears, RB9 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 Finding overdue invoices, Adding firms to RB9, or Updating firms.

1. In an Edit Firm window, scroll or jump to the **Collections** pane.
2. Any previous collection attempts are listed in the results grid. Click .
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** drop-down. Collection Action Types 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, check the **Set Remind** box. 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** drop-down *(required).* This information is used in Collection Follow-up.
7. Click **Save.** The collection effort is recorded in the **Collections** pane.
8. Optionally, enter or update any of the following:

   - **Collector**

     Resource responsible for collecting this firm's overdue payments. See Looking up resources.

   - **Retainer Amount**

     Not applicable. See Retainers.

   - **Account Status**

     Actionable financial status of this firm, such as COD or bankrupt. Account statuses are set in Lists > Firms.

   - **Payment Promised Amount**

     If the client promised to send you a payment.

   - **Payment Promised Date**

     If the client promised to send you a payment by a certain date. This date is used by Collection Forecast *(RB9 Standard only)*.

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 RB9's collection tools to contact, follow up & forecast

If you have RB9 Standard, you have additional tools to help you collect. Use 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
- Collections workflow
- Aged A/R
- Firms lists
- Collection Follow-up
- Retainers
- COD Invoices
- Collection Forecast

Step-by-step instructions

- Adding firms to RB9
- Updating firms
- Finding overdue invoices
- Looking up resources
- Sending collection letters
- 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 RB9.

Continued from Adding firms to RB9 or Updating firms.

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 new retainer amounts, click **New.**
3. In the New Retainer window, enter text or make selections:
   - ***Date**

     Required. Date of payment.
   - ***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 RB9
- Updating firms
- Searching firms
- Entering miscellaneous receipts
- Applying retainers

Retainers

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 cases. In other words, it is money you have received, but not yet earned.

NOTE: Retainers in RB9

A retainer is a liability on your books even though you deposit the funds into your checking account. As such, RB9 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 RB9 function with a Firm field, you can look up firms on the fly in your RB9 database by their company name, an alias/other name you use for them, their RB9-generated firm number, or the name/number of a contact at the firm.

1. To find a firm in RB9, 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 RB9 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 fit 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 RB9.

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 RB9 from **Entities > Firms.** See Searching firms.

Reference

- Contact

Step-by-step instructions

- Adding firms to RB9
- Searching firms
- Updating firms

Searching firms

Find firms directly in your RB9 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 job 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 up in Lists > Firms.
   - **Parent Firm**
     Click to find a firm headquarters in the Lookup Parent Firm popup. See Looking up firms.
   - **Client Of**
     Click to restrict search to firms that are designated as clients of a specific resource in the Lookup Resource popup. See Looking up resources.
   - **Sales Rep**
     Click to restrict search to firms that are commissionable to a specific sales representative in the Lookup Resource popup. See Looking up resources.

Tag

Enter text or click ▾ to select an existing tag to restrict search to firms tagged with a specific term. Tags are set up 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 RB9.

2. View results

1. Click .
2. All firms that fit 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 (a/k/a**)

   - ### Update the firm

     In Firms' results grid click the firm's:

     - **> Edit**
     - **> View** or the hyperlinked **Firm Name (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 RB9.

   - ### View the firm's financial & job 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 RB9 function with a **Firm** field. See Looking up firms.

Reference

- Lookup panel
- Firms lists
- Parent Firms
- Client Of
- Sales Rep
- Account Overview
- Historical data saved in a merge

Step-by-step instructions

- Adding firms to RB9
- Searching in RB9
- Looking up firms
- Looking up resources
- Entering general firm information
- Updating firms
- Adding contacts to RB9
- Viewing entity activity
- Removing entities
- Customizing grids

Entering general contact information

Enter basic contact information and important warnings.

Continued from Adding contacts to RB9 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. RB9 will compile a list of full name variations for you to select from in a drop-down 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

   - **Mobile Vendor**

     Contact's cell phone service provider

   - **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 jobs 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 RB9 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 & text messages.

  NOTE: Contact's email address automatically assigned to notification emails

  When you enter a contact's email address here and click **Save,** RB9 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 are set in Lists > Contacts.

- **Title**

  Contact's job title. Job titles 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 is set in Lists > Contacts.

- **Warning**

  Any important information that users should know about the contact when scheduling or invoicing jobs. This information appears in red under Contact Warning in jobs, in **View Party** panels, and in **View Invoice** panels.

2. Click **Save.**

Reference

- Contacts lists

Step-by-step instructions

- Composing emails & text messages

- Searching contacts
- Looking up contacts
- 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

Entering additional contact information

Enter user credentials for online and miscellaneous information.

Continued from Adding contacts to RB9 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 RB 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). 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 RB Connect, enter an initial password for the contact in **Password.** Users can reset their password themselves in RB Connect, and you can reset passwords here too.
     - **Existing contact:** If the contact needs a new password for RB 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.

- **Calendar Notes**

  Unlimited character count. Information about the contact resources should know for jobs for this contact. Text entered here appears on the Assignment Notification form in the optional Ordering Client Calendar Notes data field. See Sending individual assignment notifications and Sending batch assignment notifications/cancellations.

  To customize the appearance of the notes, see Customizing notes & remarks. Text customizations will appear in Assignment Notifications sent to resources.

- **Production/Billing Notes**

  Unlimited character count. Information about the contact relevant to producing and invoicing turned-in jobs for this contact. Text entered here also appears on:

  - Assignment Notification form in the optional Ordering Client Production/Billing Notes data field.
  - Production Sheets.

  To customize the appearance of the notes, see Customizing notes & remarks. Text customizations will appear in Assignment Notifications sent to resources and on Production Sheets.

2. Click **Save.**

Reference

- RB Connect
- Connect Preferences
- Resource Worksheets
- Production Sheets

Granting access

Designate and monitor seniors, contacts who have access to other contact's activities in RB Connect. To make someone senior to another contact, you grant them access to the contact's RB 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 for 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 RB Connect activities.

Reference

Reference

- RB Connect
- Seniors

Step-by-step instructions

- Looking for 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 RB Connect, such as depo schedules, file repositories, and invoices.

NOTE: Designating seniors relates to online access

Seniors have access to all activities in RB 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

- RB 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 RB9 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 are set up 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. Contacts can be billed using a different set of rate tables than their firm. Contacts must be connected to a Billing Rate Group. Billing Rate Groups are created in Lists > Accounting.

   - **Billing Rate**

     Specific rate table in the selected **Billing Rate Group** to use for this contact. Contacts can be billed using a different rate table than their firm. Billing Rates are set up in Setup > Billing Rates.

   - **Home Address**

     If you prefer to use contacts' home addresses for sending cards and gifts (see Celebrating client anniversaries), enter the street address only. City, state, zip code and country have their own fields/drop-downs.

   - **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 . RB9 will automatically populate the other address fields.

   - **Client Of**

     Default is the firm's Client Of resource. If this contact belongs to a different resource, see Looking up resources.

- **Sales Rep**

  Default is the sales representative/account executive assigned to the firm. If this contact belongs to a specific sales rep, see Looking up resources.

- **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

- Contacts lists
- Date Navigator
- Billing Rate Groups
- Accounting lists
- Billing Rates setup
- Client Of
- Sales Rep

Step-by-step instructions

- Celebrating client anniversaries
- Looking up resources

Remembering important client dates

Enter the contact's birthday, wedding anniversary, and other important dates to have RB9 automatically remind you of an upcoming event within a set number of days. Use Anniversary Inquiry *(RB9 Standard only)* 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 Types 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 RB9 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
- Others lists

Step-by-step instructions

- Adding contacts to RB9
- Updating contacts
- Celebrating client anniversaries

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 jobs 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 RB 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 box next to a contact who should receive points, or check the **Contact** box to select all contacts.
  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
- Others lists
- Service Item Master
- RB Connect

Step-by-step instructions

- Awarding job points
- 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 RB 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

- Awarding job points
- Managing contacts' award points
- Fulfilling online reward point requests

Looking up contacts

Find contacts in your RB9 database by their name (various versions including aliases) or the company they work for.

1. To find a contact in RB9, 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 fit 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 RB9 from **Entities > Contacts.** See Searching contacts.

Step-by-step instructions

- Adding contacts to RB9
- Searching contacts

Searching contacts

Find contacts directly in your RB9 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 job 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 up in Lists > Contacts.

   - ### Email

     Enter part of the contact's email address.

   - ### Client Of

     Click ⊡ to restrict search to contacts who are designated as clients of a specific resource in the **Lookup Resource** popup. See Looking up resources.

   - ### Sales Rep

     Click ⊡ to restrict search to contacts who are commissionable to a specific sales representative in the Lookup Resource popup. See Looking up resources.

- **Tag**

  Enter text or click ▾ to select an existing tag to restrict search to contacts tagged with a specific term. (Tags are set up in Lists > Contacts.)

- **Caller ID**

  Enter the contact's 10-digit phone number 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 RB9.

2. View results

1. Click .
2. All contacts who fit 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 RB9.

   - **View the contact's financial & job 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 RB9 function with a **Contact** field. See Looking up contacts.

Reference

- Lookup panel
- Contacts lists
- Client Of
- Sales Rep
- Account Overview
- Historical data saved in a merge

Step-by-step instructions

- Searching in RB9
- Looking up firms
- Looking up contacts
- Looking up resources
- Updating contacts
- Adding contacts to RB9
- Viewing entity activity
- Removing entities
- Customizing grids

Entering general resource information

Enter basic resource information, including contact information and important warnings.

Continued from Adding resources to RB9 or Updating resources.

1. In the **General** pane of an Edit Resource window, enter text in fields or make selections:

   - ***Full Name**

     Required. Resource name as it will appear in RB9.

     If the resource is a person: First enter the resource's name and title in the fields below. Then select a name configuration in the drop-down.

     If the resource is not a person: Enter the entity's name here.

   - **First Name**
     Person's given name

   - **Mi.**

     Person's middle name or initial

   - **Last Name**

     Person's surname/family name

   - **a/k/a**

     If you commonly refer to the resource by another name, enter that alias. You can search for the resource by name or alias, and the alias will appear in parentheses after the resource name in search results.

   - **Salutation**

     Person's title, i.e., how you address them

   - **Address**

     Resource's street address or post office box

   - **City/State/Country/Zip**

     Do not enter the resource's city, state or country. Instead, enter the resource's postal code (zip code) in **Zip,** then click . RB9 will automatically populate the other address fields.

   - **Directions**

     Any information that would help someone find the resource's location easier

- **Main Phone**

  Local phone number you would use most often to call the resource

- **Alt. Phone**

  Additional phone number to use for the resource

- **Mobile Phone**

  Resource's cell phone number.

- **Mobile Vendor**

  Resource's cell phone service provider

- **Fax**

  If resource uses a facsimile machine, the fax number.

- **Active**

  Yes is selected by default. When the resource is no longer working with you and you do not want them to appear as available for assignments anymore, slide to No.

- **Resource No.**

  Assigned by RB9 and uneditable

- **Email**

  Resource's work email address. Click ✉ to send email directly to resource. See Composing emails & text messages.

- **Different Billing Address**

  If the resource wants paychecks and statements sent to a different address, slide to Yes and enter the details below.

- **Address**

  Street address or post office box for sending paychecks and statements.

- **City/State/Country/Zip**

  Do not enter the billing address's city, state or country. Instead, enter the user's postal code (zip code) in **Zip,** then click . RB9 will automatically populate the other address fields.

- **Warning**

  Any important information that users should know about the resource when scheduling jobs. Information entered here appears in **Assign Resource** panel results and **New/View/Edit Task** panels.

- **Resource Type**

  Category that best fits the resource. Resource Type is set in Lists > Resources.

2. Click **Save.**

Reference

- Resources lists

Step-by-step instructions

- Searching resources
- Adding resources to RB9
- Updating resources
- Composing emails & text messages
- Entering additional resource information
- Entering pay information
- Setting work schedules
- Managing notification emails
- Organizing with tags
- Entering specialties
- Entering certifications
- Uploading files to a repository
- Making entries in notes logs

Entering additional resource information

Enter user credentials for online and digital signatures, plus miscellaneous information.

Continued from Adding resources to RB9 or Updating resources.

1. In an Edit Resource window's **Additional** pane, enter text in fields or select options:

- **Birth Date**

  If applicable, the resource's birth date. **Birth Date** can be added without the year.

- **Account is locked out**

  If a resource has made too many incorrect attempts to log into RB Connect, the system will lock them out. Slide to No to allow the resource 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). The option to use the resource's email address as their login ID is set in Connect > Connect Preferences > Login.

- **Reset Password**

  If the resource needs a new password for RB 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.**

- **Certificate No.**

  If the resource is a licensed CSR (Certified Shorthand Reporter), the certification number.

  TIP: Include certification on transcripts

  You can customize RB9 PDF Transcript templates *(RB9 Standard only)* to include this number in RB-PDF Transcript headers or footers. See Setting RB-PDF Transcript header & footer preferences.

- **Date Started**

  Resource's date of employment/contract commencement with your company

- **Date of Termination**

  If applicable, date of the resource's employment/contract termination with your company

- **Signature Proxy ID**

  If you use RB Digital Signature Proxy to digitally sign your reporters' RB-PDF Transcripts, resource's digital certificate ID.

- **Signature Proxy Password**

  If you use RB Digital Signature Proxy to digitally sign your reporters' RB-PDF Transcripts, resource's digital certificate password.

2. Click **Save.**

Reference

- Date Navigator
- RB Connect
- Connect Preferences
- PDF Transcript Preferences
- RB-PDF Transcripts
- RB Digital Signature Proxy
- ReporterBase.net

Step-by-step instructions

- Searching resources
- Adding resources to RB9
- Updating resources
- Setting RB-PDF Transcript header & footer preferences
- Entering general resource information
- Entering pay information
- Setting work schedules
- Managing notification emails
- Organizing with tags
- Entering specialties
- Entering certifications
- Uploading files to a repository
- Making entries in notes logs
- Managing notes logs
- Canceling notes

Entering pay information

Specify resource pay details.

Continued from Adding resources to RB9 or Updating resources.

1. In an Edit Resource window, scroll or jump to the **Pay Info** pane.
2. In the **Pay Info** pane, enter or update any of the following:

- **Do not pay this resource**
  Slide to Yes if you do not want to include this resource (e.g., an owner or conference room) in the pay process.
- **Self Scope**
  Slide to Yes if the resource does their own scoping.
- **Priority Level**
  Order of preference or availability. Priority levels, including the default, are defined in Lists > Resources.
- **Pay Group**
  Categories of time periods your company uses to pay resources, e.g., Monthly, Weekly, On Demand. Pay groups are set up in Lists > Resources.
- **Pay Rate Group**
  Set of pay rate tables. A resource must be connected to a pay rate group. Pay rate groups, which determine which pay rates the resource is paid using, are set up in Lists > Accounting.
- **Pay Rate**
  Assign a default pay rate table. Pay rate tables listed here come from the **Pay Rate Group.** The default can be overridden at the time of billing. Pay rates are set up in Pay Rates.
- **Tax ID**
  Federal tax ID number, if this resource is an independent contractor, another court reporting agency or other entity that you submit 1099-NEC forms for.
- **Payroll Ref. No.**
  Some reporters or agencies who work for other agencies have their own reference number for their invoices. A number entered here will appear on the Resource Pay Statements report and their payroll checks.
- **Print 1099 Form**
  Slide to Yes if you provide this resource with their federal 1099-NEC forms.

- **Direct Deposit**
  If you want to direct deposit this resource's pay:

  1. Check **Direct Deposit** box.
  2. Enter the resource's bank account number in **Bank Account No.**
  3. Select the resource's **Account Type** in the drop-down.
  4. Enter the resource's bank's routing number in **Bank Routing No.**

- **Original Term**

  Number of days from the date of the invoice before this resource is paid on originals. Defaults are set in System Preferences > Entities > Resources.

  - "9999" if you pay only after the client has paid.
  - "0" if you guarantee the original and use a cutoff date to specify the waiting period between when you are paid for an invoice and the resource is paid.

- **Copy Term**

  Number of days from the date of the invoice before this resource is paid on copies. Defaults are set in System Preferences > Entities > Resources.

  - "9999" if you pay only after the client has paid.
  - "0" if you guarantee the copies and use a cutoff date to specify the waiting period.

- **Commission Rate (When Covering)**

  For a resource with their own clients (Client Of), enter a percentage for extra commission pay. For example, you might pay an extra 5% in addition to the regular pay when the resource's client initiates a job and the resource covers the job — or the resource covers a job that is part of a case for which they are the designated Client Of resource (see Entering general case information).

  For a sales rep (account executive), enter a percentage for sales commissions.

- **Commission Rate (When Not Covering)**

  For a resource with their own clients (Client Of), enter a percentage for extra commission pay. For example, you might pay an extra 3% in addition to the regular pay when the resource's client initiates a job, but a different resource covers the job, or when a different resource covers a job that is part of a case for which this resource is the designated Client Of resource.

  For a sales rep (account executive), enter a percentage for sales commissions.

- **Recurring Amount**

  If you are adding or subtracting a set amount on the resource's paychecks for a

specific amount of time (for example, the resource is paying back an advance in installments), enter the regularly occuring amount. Enter paycheck deductions as negative numbers.

- **Recurring From/Recurring To**

  If an amount is entered in Recurring Amount, enter start **(Recurring From)** and end dates **(Recurring To)** in the fields or click to select dates in Date Navigator, for when the amount will be deducted from the resource's paycheck.

3. Click **Save.**

References

- Resources lists
- Accounting lists
- Pay Rate Group
- Pay Groups
- Pay Rates
- Resources preferences
- Cutoff Date
- Client Of
- Sales Rep
- Date Navigator

Step-by-step instructions

- Searching resources
- Adding resources to RB9
- Updating resources
- Setting up pay rates
- Entering general case information

Offering incentive bonus programs

Well-planned incentive bonus programs can help you attract and retain highly talented reporters. For example, when new reporters walk in the door with attorneys already in their pockets, use the Client Of feature in RB9 to:

- Track the amount of the business being generated from those attorneys; and
- Pay an incentive bonus based on the new business generated.

Encourage (and reward) all of your resources to be a marketing force. After all, they interact with attorneys who are not your clients every single day. If any resources bring in new clients, track and pay them incentive bonuses too.

1. **Entities > Firms** or **Entities > Contacts**
2. Locate a resource's client.
3. In the View Firm/View Contact window, scroll or jump to the **Marketing** pane. If no resource appears in **Client Of,** click **Edit.**
4. To specify this firm's/contact's resource who qualifies for bonuses, see Looking up resources.
5. Click **Save.**
6. **Entities > Resources**
7. Locate the resource. (See Searching resources.)
8. In the Edit Resource window, scroll or jump to the **Pay Info** pane.

   - ### Commission Rate (When Covering)

     For a resource with their own clients (Client Of), enter a percentage for extra commission pay. For example, you might pay an extra 5% in addition to the regular pay when the resource's client initiates a job and the resource covers the job — or the resource covers a job that is part of a case for which they are the designated Client Of resource (see Entering general case information).

     For a sales rep (account executive), enter a percentage for sales commissions.

   - ### Commission Rate (When Not Covering)

     For a resource with their own clients (Client Of), enter a percentage for extra commission pay. For example, you might pay an extra 3% in addition to the regular pay when the resource's client initiates a job, but a different resource covers the job, or when a different resource covers a job that is part of a case for which this resource is the designated Client Of resource.

     For a sales rep (account executive), enter a percentage for sales commissions.

9. Click **Save.**
10. To pay incentive bonuses, go to **Payables > Sales Commission Report.**
11. In the **Commission For** drop-down, select Client Of to generate a list of commissionable invoices.

References

- Client Of
- Sales Rep
- Sales Commission Report

Step-by-step instructions

- Looking up resources
- Searching resources
- Entering general case information
- Printing sales commission reports

Setting work schedules

Resources' availability for assignments is generated by the system using the work schedule set up for each resource. When assigning resources to tasks, only resources who are available during the scheduled time will appear in the list of resources. You can override resources' availabilities manually to handle exceptions.

Continued from Adding resources to RB9 or Updating resources.

1. In an Edit Resource window, scroll or jump to the **Work Schedule** pane.
2. Click and drag the beginning and end dots on each day-of-the-week's sliders to change the resource's default availability for each day.
3. Click **Save.**

NOTE: Overriding default work schedules

There are 2 ways to temporarily override resources' work schedules:

- **To assign a resource outside their regular work hours**
  When assigning resources, RB9 automatically removes resources from the Available Resources list whose regular work schedule do not include the scheduled job's hours. You can override RB9's available resource filter to access those resources and assign them. See Overriding resource availability.
- **To give a resource additional time off**
  You can override resources' availabilities manually to handle exceptions, such as requests for time off in Resource Availability. See Managing resources' availability.

References

- Resource Availability

Step-by-step instructions

- Searching resources
- Adding resources to RB9
- Updating resources
- Assigning resources to tasks
- Assigning and pre-assigning resources
- Overriding resource availability
- Managing resources' availability

Entering specialties

If a resource has specific expertise, add that specialty to their RB9 listing. Then when you have a task that requires that specialty, the resource will be included in the list of available resources so you can assign resources more accurately.

Continued from Updating resources.

1. In an Edit Resource window, scroll or jump to the **Specialties** pane.
2. Click .
3. In the **Add Specialties** panel, select the resource's specialties. Specialties are set up in Lists > Resources.
4. Click **Save.**

NOTE: Removing specialties

To remove a specialty from a resource, check its box in the **Specialties** pane, then click .

References

- Specialties
- Tasks
- Resources lists

Step-by-step instructions

- Adding resources to RB9
- Updating resources
- Scheduling jobs
- Searching in RB9
- Requiring specialties
- Assigning resources

Entering certifications

If resources have been certified for particular skills/knowledge, add that certification to their RB9 listings as reference for evaluating resources. You can also include certification expiration dates and set reminders so resources don't let their certifications lag.

Continued from Updating resources.

1. In an Edit Resource window, click in the **Certifications** pane.
2. In the **New Certification** panel, enter text in fields or make selections:
   - **Certification Type**
     Certificate the resource has received. (Certification types are set in Lists > Resources.)
   - **Date Achieved**
     Date the resource received the certification. (See Date Navigator.)
   - **Active**
     Default is Yes. If resource later loses certification, slide to No.
   - **Expiration Date**
     Date by which certification must be renewed.
   - **Set expiration reminder before x days**
     Enter a number for how many days before the expiration date you want a note sent to the staff in Notifications and Messages to alert the resource to renew their certificate. (See Communicating within RB9.)
   - **Remarks**
     Any notes about the resource's certification.
3. Click **Save >**
   - **Save & Edit:** To enter more certifications.
   - **Save & Close:** If you have no more certifications to add.

NOTE: Updating or removing certifications

To update or remove a resource's certification, click the certification's hyperlink in the **Certifications** pane. In the **Edit Certification** panel, update fields as needed, then click **Save.** Or click **Delete** to remove the certification from the resource's listing.

References

- Certifications

- Resources lists
- Date Navigator
- Notifications and Messages

Step-by-step instructions

- Updating resources
- Communicating within RB9

Looking up resources

Find resources in your RB9 database by name, alias, or number.

1. To find a resource within an RB9 function, click a **Resource** field's (or **> Lookup Resource).**
2. In the Lookup Resource popup, select a filter in **Search By:**
   - **Resource No.**
     If selected, enter the entire resource number in **Search Criteria.**
   - **First Name**
     If using the Full Name filter returns too many results, select First Name and enter part of the resource's given name (if a person) in **Search Criteria.**
   - **Full Name**
     Default. Enter part of the resource's name in **Search Criteria.**
   - **Full Name or a/k/a**
     Enter part of the resource's name or alias in **Search Criteria.**
   - **Last Name**
     If using the Full Name filter returns too many results, select Last Name and enter part of the resource's surname in **Search Criteria.**
3. Click . All resources that fit the search criteria appear in the results pane.
4. Click the resource's hyperlinked full name in the results pane to select that person/business. If the resource is not in your database, you can add them by clicking **New** (see Adding resources to RB9).

NOTE: Using Resources module to find resources

You can look up resources directly in RB9 from **Entities > Resources.** See Searching resources.

Step-by-step instructions

- Adding resources to RB9
- Searching resources

Searching resources

Find resources directly in your RB9 database using various search criteria. Before entering a resource 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 task trends of an individual resource.

1. Set search criteria

1. **Entities > Resources**
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 resource's name in the field.
     - **Full Name or a/k/a** – Select this option in the dropdown and enter part of the resource's name or alias in the field.
     - **First Name** – Select this option in the dropdown and enter part of the resource's given name in the field.
     - **Last Name** – Select this option in the dropdown and enter part of the resource's surname in the field.

   - **State**

     Click to select a state in the Lookup State popup. See Looking up firms.

   - **Zip**

     Enter a 5-digit zip code to search for resources in one area.

   - **Resource Type**

     Default is ALL. Click to select one or more categories of resources in the Lookup Resource Type popup. Resource types are set up in Lists > Resources.

   - **Specialty**

     Default is ALL. Click to restrict search to resources with specific skills/expertise in the Lookup Specialty popup. Specialties are set up in Lists > Resources.

   - **Priority Level**

     Default is ALL. Click to restrict search to resources based on order of preference or availability in the Lookup Priority Level popup. Priority levels are set up in Lists > Resources.

- **Pay Rate Group**

  Default is ALL. Click to restrict search to resources at particular pay levels in the Lookup Pay Rate Group popup. Pay rate groups are set up in Lists > Resources.

- **Tag**

  Enter text or click ▾ to select an existing tag to restrict search to resources tagged with a specific term. Tags are set up in Lists > Resources.

- **Show Active Only**

  Default is Yes. Leave as the default if you only want to see resources that you have designated as Active (see Entering general resource information). If you want to see all resources, slide to No.

- **Email**

  Enter part of the resource's email address.

- **Resource No.**

  Enter the entire resource number assigned by RB9 to a resource.

- **Mobile Phone**

  Enter the resource's 10-digit phone number.

2. View results

1. Click .
2. All resources that fit the search criteria appear in the results pane. To:

   - **View resource details**

     In the Resources' results grid click the resource's:

     - **> View**
     - Hyperlinked **Full Name (a/k/a)**

   - **Update the resource**

     In the Resources' results grid click the resource's:

     - **> Edit**
     - **> View** or the hyperlinked **Full Name.** In the View Resource window, click **Edit.**

     See Updating resources.

- **View the resource's financial & job trends**
  Click **Account Overview** in the View Resource/Edit Resource window. See Viewing entity activity.

- **Remove the resource by deleting or merging**
  See Removing entities.

TIP: Set up the results grid to work for you

The Resources' 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 resources on the fly

You can look up resources in any RB9 function with a **Resource** field. See Looking up resources.

Reference

- Lookup panel
- Resources lists
- Account Overview
- Historical data saved in a merge

Step-by-step instructions

- Searching in RB9
- Looking up firms
- Looking up contacts
- Looking up resources
- Updating resources
- Adding resources to RB9
- Viewing entity activity
- Removing entities
- Customizing grids

Specialties

A **specialty** in RB9 is a specific type of expertise that is required for some jobs, such as medical reporting, Spanish, or RealTime.

TIP: Customize which specialties are listed in RB9
Specialties are set up in Lists > Resources.

Reference

- Resources lists

Step-by-step instructions

- Entering specialties
- Requiring specialties

Client Of

Client Of refers to resources who have their own clients, whose jobs they can cover, and whom you can pay commissions to. For example, reporters who brought clients with them when they joined your agency can earn commissions on jobs those clients order. These are different from sales reps, who make sales and handle clients, but don't cover jobs.

Reference

- Sales Rep
- Marketing Inquiry

Step-by-step instructions

- Entering pay information
- Offering incentive bonus programs
- Entering firm marketing information
- Entering contact marketing information
- Evaluating your business by resource
- Finding highest commissioned resources

Sales Rep

Sales Rep refers to resources who are your sales representatives or account executives. Sales reps are different from Client Of resources who have their own clients they brought to your agency and whose jobs they can cover.

Reference

- Client Of
- Marketing Inquiry

Step-by-step instructions

- Searching cases
- Entering case information
- Searching jobs
- Entering additional job information
- Entering pay information
- Searching firms
- Entering firm marketing information
- Searching contacts
- Entering contact marketing information
- Celebrating client anniversaries
- Evaluating your business by resource
- Finding highest commissioned resources

Entering general location information

Enter basic location information, including addresses and important warnings.

Continued from Adding locations to RB9 or Updating locations.

1. In the **General** pane of an 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 . RB9 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.

   - **Active**

     Box is Yes by default. When the location is no longer used for jobs, slide to No.

   - **Location No.**

     Assigned by RB9 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.

- **Contact Person**

  Name of the point person at the location

- **Email**

  Email address of the point person at the location. Click ✉ to send email directly to contact. See Composing emails & text messages.

- **Warning**

  Any important information that users should know about the location when scheduling jobs. Information entered here appears in red in the **Job Location** pane of View Job/Edit Job windows.

- **Web URL**

  Location's home page address.

2. Click **Save.**

Reference

- Lookup panel
- Locations lists

Step-by-step instructions

- Adding locations to RB9
- Searching locations
- Looking up locations
- Updating locations
- Composing emails & text messages

Looking up locations

Within any RB9 function with a Location field, you can look up locations on the fly in your RB9 database by their name, other names you might use for them, or their city.

1. To find a location in RB9, 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 fit 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 RB9. See Adding locations to RB9.

NOTE: Using Locations module to find locations

You can look up locations directly in RB9 from **Entities > Locations.** See Searching locations.

Step-by-step instructions

- Adding locations to RB9
- Searching locations

Searching locations

Find locations directly in your RB9 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.**
   - **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.
   - **Location Type**
     Click ▣ to select one or more categories of locations in the Lookup Location Type popup. See Lookup panel. Location types and default are set up 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 up 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 fit 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 RB9 function with a **Location** field. See Looking up locations.

Reference

- Lookup panel
- Locations lists
- Historical data saved in a merge

Step-by-step instructions

- Adding locations to RB9
- 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/drop-downs.

     After entering the full address, you can view the location and get directions by clicking and selecting a map from the drop-down.

   - **Directions**

     Any instructions entered here will appear in the **Directions** field of a Job window in the Calendar if the job 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 . RB9 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 RB9 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 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.)

   - **Pages to deduct**

     Number of pages to deduct from the transcript pages when calculating resources' pay. This default can be overridden for a specific job at the time of billing.

   - **Apply cutoff to payments also**

     Slide to Yes to apply the payroll cutoff date to the date payment is made by your client. If No, the payroll cutoff date uses the date of the invoice. (See Setting up pay dates.)

   - **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

- Cutoff Date

Step-by-step instructions

- Setting up business units
- Updating business units

Entering default task deadlines

You can set a general time frame for each task (for regular deliveries) for your different business units and for firms that have task turnaround requirements. Then when a task is added, the due date will be automatically calculated based on this setting from the ordering firm's time frame, and if there is none, then from the assigned business unit.

RB9 calculates a job's due date, excluding weekends and any designated holidays (see Holidays preferences). This value will be overridden for jobs for firms that have their own deadlines for preferred services (see Adding standing requests).

Continued from Setting up business units, Updating business units, or Updating firms.

1. In the **Task Due Days** pane of an Edit BU/Edit Firm window, all task types are listed. (Task types are defined in Lists > Jobs.) To customize the turn-around time for a task, click the task's hyperlinked name.
2. In the **Edit Task Due Days** panel, update the number in ***Due Days** *(required).*
3. Click **Save.**

Reference

- Task
- Holidays preferences
- Jobs lists

Step-by-step instructions

- Adding standing requests
- Setting up business units
- Updating business units
- Updating firms

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
  RB9 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). RB9 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

Adding your company logo to transcripts

RB9 Standard only

Before uploading your company logo to appear in RB-PDF Transcripts, 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
  RB9 only accepts .jpg or .png files
- **Logo image file size:** Make the smallest file size possible, because the logo appears in the header/footer of every page of your transcripts. Image file size has a direct impact on performance: Larger file sizes slow file processing, downloading, and printing.
- **Logo image size & ratio:** Actual image size & ratio are used. Since the system does not adjust the image, it should be properly formatted to fit inside the header/footer prior to uploading.

2. Add your logo

To add your company logo in the **PDF Transcript Logo** pane of an Edit BU window, see Uploading logos for insertion.

Reference

- RB-PDF Transcripts

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 job activity for a firm, a single contact at a firm, or a resource over the last 6 months, year or 2 years in interactive line graphs.

Reference

- Firms
- Contacts
- Resources

Step-by-step instructions

- Viewing entity activity

Adding standing requests

Instead of entering one service item at a time a client has requested for a job, 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 a case or job 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.**
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). RB9 automatically calculates a job'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 jobs.
   - **Delivery Method**

     If applicable, the client's preferred way of receiving the service item. Delivery methods are set in Lists > Production.
   - **Turnaround Type**

     If the client wants a specific type of expedited delivery. Turnaround types are defined in Rush Type Master.
   - **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
- Production lists
- Rush Type Master

Step-by-step instructions

- Selecting 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 RB9. For example, if a firm wants different types of emails sent to different people in the company — emails about scheduled depos, i.e. jobs, should be sent to a paralegal while emails about invoices should go to the Accounting department — 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** drop-down.

   Notification types are set by RB9 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 job 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 or resource, RB9 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 job, slide **Active** to No 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
- Updating resources
- Entering general contact information

Viewing entity activity

View month-by-month comparisons of the financial and job activity for a firm, a single contact at a firm, or a resource over different time periods.

Continued from Searching firms, Searching contacts, and Searching resources.

1. In a View or Edit Firm/Contact/Resource 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**

     Firms & Contacts only

     Total receivables since they became a client

   - **Future Jobs**

     Firms & Contacts only

     Any future jobs scheduled

   - **Total Payable**

     Resources only

     Outstanding payables for jobs that have been billed

   - **Future Tasks**

     Resources only

     Upcoming tasks

   - **In-progress Tasks**

     Resources only

     Tasks not turned in yet by the resource

3. The line graphs default to the entity's trends over the last six months. Depending on the entity, the line graphs display:

   - **Activity Trends**

     - **Firms & Contacts:** Revenue generated each month
     - **Resources:** Monthly earnings

- **Schedule Trends**

  Firms & Contacts only

  - **Blue line:** Jobs scheduled each month
  - **Red line:** Jobs canceled each month

- **Job Trends**

  Firms & Contacts only

  Jobs that occurred each month

- **Task Trends**

  Resources only

  - **Blue line:** Assigned tasks
  - **Red line:** Canceled tasks

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
- Task

Step-by-step instructions

- Searching firms
- Searching contacts
- Searching resources

Managing clients' resource preferences

If a firm or contact has resources they prefer on their jobs, and conversely if there are resources they do not want assigned to their jobs, you can use the Preferred and Blocked Resources panes in their listing to manage their preferences. When assigning resources to tasks on jobs the client scheduled or ordered, their preferred resources will appear at the top of the list. And if you try to assign one of their blocked resources, RB9 will alert you and not allow the assignment.

1. In an Edit Firm/Edit Contact window, scroll or jump to the **Preferred Resources** or **Blocked Resources** pane.

2. Any resources that have already been entered appear in the panes. Click next to:

   - **Preferred Resources** to enter additional resources the client wants assigned to their jobs.

   - **Blocked Resources** to enter resources the client does not want assigned to their jobs.

3. In the **Lookup Resource** panel, find the resource you want to include. See Looking up resources. The selected resource appears in the selected pane's list.

4. To remove any listed resource, check the box next to the resource's name in the list, and click . then click **Yes** in the popup.

Reference

- Preferred Resource

Step-by-step instructions

- Updating firms
- Updating contacts
- Assigning resources to tasks

Preferred Resource

A **preferred resource** is a resource that a particular firm or contact wants you to assign to tasks on jobs they schedule or order from you.

Step-by-step instructions

- Managing clients' resource preferences

Blocked Resource

A **blocked resource** is a resource that a particular firm or contact does not want assigned to tasks on jobs they schedule or order from you.

Step-by-step instructions

- Managing clients' resource preferences

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
- Resources
- Locations

Step-by-step instructions

- Organizing with tags
- Searching firms
- Searching contacts
- Searching resources
- Searching locations
- Managing tags

Organizing with tags

Label firms, contacts, resources, and locations with tags (keywords or phrases) to mark them as part of specific groups, which you can use for different purposes, such as monitoring or marketing. 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** drop-down.
   - **Select an entry in the drop-down** – Tags that appear in the drop-down are set up in Lists > Firms, Lists > Contacts, Lists > Resources, 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 drop-down containing appropriate tags for the particular entity they are tagging. This is faster than typing and eliminates misspellings. Having a uniform list in a drop-down 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, resources, or locations, they can be added to their respective tag drop-downs 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 *(RB9 Standard only)* 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

- Firms lists
- Contacts lists
- Resources lists
- Locations lists

Step-by-step instructions

- Updating firms
- Updating contacts
- Updating resources
- Updating locations
- Customizing lists
- Managing tags

Accounting

Although RB9 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. RB9 provides an expanded list of account types, which you can edit/add to.

  Entries here appear in the **Account Type** drop-down 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 a case must be connected to a billing rate group. Refer to the Rates setup workflow for the complete rates setup order.

- **Pay Rate Group**

  A Pay Rate Group is a parent structure that contains related pay rates as its children. Set up basic categories (groups), such as different pay grades. Then add pay rates (in Setup > Pay Rates). Each pay rate group can have an unlimited number of pay rate tables.

  Every resource must be connected to a pay rate group.

- **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** drop-down in firms. See Entering additional firm information.

- **Payment Type**

  A payment type identifies the method of payment, e.g., check or credit card. Entries here appear in the **Payment Type** drop-down 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 RB9 and cannot be modified by the user.

- **Transaction Type**

  Identifies the transaction method, 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 RB9 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 RB9 prints the unit type on detailed invoices next to the number of units.

Reference

- Five basic accounts
- Chart of Accounts
- Rates setup workflow
- Billing Rate Group
- Billing Rates setup
- Pay Rate Group
- Pay Rates setup
- 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
- Setting up pay rates

Cases

RB9 is a case-based system. Case attributes will be automatically applied to jobs tied to a case.

For how to set up lists, see Customizing lists.

- **Case Type**

  Categories of cases by work type, e.g., Civil or Personal Injury.

- **For**

  Designation specifying which side the attorney represents, e.g., Plaintiff or Defendant. Appears in individual parties in cases and jobs.

- **Notes Type**

  Categories of notes to use as a filter when searching Case Notes Logs.

- **Status**

  Designation specifying what stage the case is in, e.g., In Progress or Settled. Used as a filter in Cases.

Reference

- Case
- Notes Log

Step-by-step instructions

- Customizing lists

Connect

RB Connect is the RB9 plug-in that gives your clients and resources direct access to your office via the internet.

For how to set up lists, see Customizing lists.

- **Ticket Rating**

  Designate the ratings RB 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.

- **Time-off Status**

  Designation specifying what stage a resource's time-off request is in, e.g., Pending or Approved. This list is not customizable.

Reference

- RB Connect

Step-by-step instructions

- Customizing lists

Invoice

RB9 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. RB9 automatically generates a standard invoice header for each witness 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 and Aged A/R.

- **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 to use as a filter when searching Invoice Notes Logs.

Reference

- Invoice Headers
- Invoice Messages
- Invoice Inquiry
- Aged A/R
- Notes Logs

Step-by-step instructions

- Customizing lists
- Setting up invoice headers
- Setting up invoice messages

Jobs

Usually depositions, jobs can also be any other type of work requests from clients you want to designate, such as videoconferencing or captioning.

For how to set up lists, see Customizing lists.

- **Expert Type**

  Designation specifying area of special knowledge, e.g., Accident & Injury, or Business & Financial.

- **How Referred**

  Categories for ways clients heard of you, e.g., Affiliate Referral or Repeat Business.

- **Job Type**

  Designation specifying kind of job requested by client, such as Deposition or Real-Time.

- **Notes Type**

  Categories of notes, e.g., Sales or Marketing, to use as a filter when searching Job Notes Logs.

- **Job Status**

  Designation specifying what stage the job is in, e.g., New or Cancelled. Some categories are preset in RB9 and cannot be modified by the user. If you don't need a Job Status, but it cannot be deleted because it is an RB9 preset, slide its **Active** slider to No so it won't appear in jobs or as a filter in job searches.

- **Task**

  Designation specifying part of a job that requires a *separate* resource (person, company, thing) to accomplish.

  ### Task examples

  - Reporting
  - Videotaping
  - Interpreting
  - Conference Room-Inhouse
  - Conference Room-Outside

- Catering

If a task does not require:

- Automatic file attachments from repositories, designate that here by checking the **Do not attach any files from All-Resources-level, Firm-level, Job-level, and Case-level repository to Assignment Notification** box.
- Turn-in (such as conference rooms and catering), check the **No Turn-in** box.

- **Task Status**

  Designation specifying what stage the task is in. Some categories are preset in RB9 and cannot be modified by the user. If you don’t need a Task Status, but it cannot be deleted because it is an RB9 preset, slide its **Active** slider to No so it won't appear in tasks or as a filter in task searches.

Reference

- Jobs
- Notes Log
- Tasks

Step-by-step instructions

- Customizing lists
- Scheduling jobs
- Entering tasks

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 RB9 accounts, e.g. Gift Certificate or Cash.

Reference

- Anniversary Inquiry
- Notes Log
- Award Points

Step-by-step instructions

- Customizing lists
- Remembering important client dates
- Celebrating client anniversaries
- Awarding job points
- Managing contacts' award points

Repository

A document (file) can be archived in RB9 by uploading it to the repository of a case, job, firm, contact, resource, location, invoice or witness, or the all-resources-access repository.

For how to set up lists, see Customizing lists.

- ## File Type

  In addition to which repository in RB9 a document is stored, the file can be further categorized by type. Create your own custom file types that can be selected in the drop-down, e.g. ASCII, Notice, or Delivery Receipt.

  File type is used to determine which files appear in different functions in RB9 or which types clients and/or resources have access to. For example, you can have RB9 automatically attach notices to the job assignment emails by setting up a file type and system preferences. See Attaching files to notifications automatically.

  For each file type, check the **Show to Contact** and **Show to Resource** boxes to have files with that file type appear in their online repositories (if you have RB Connect).

Reference

- Repository
- ASCII
- Calendar preferences
- RB Connect

Step-by-step instructions

- Customizing lists
- Attaching files to notifications automatically
- Uploading files to a repository
- Customizing communications

Pay Group

Pay Groups are categories of time periods your company uses to pay resources, e.g., Monthly, Weekly, On Demand. Group resources according to their pay period (frequency) to reduce errors when running payroll.

Reference

- Resources lists
- Pay Dates

Step-by-step instructions

- Creating pay groups
- Setting up pay dates

Creating pay groups

Set up the different pay periods you use as Pay Groups. Then attach dates to the groups yearly for paying resources associated with each group.

NOTE: Pay Groups vs. Pay Rate Groups

Pay groups are different from Pay Rate Groups, which categorize resources by how you classify them for pay amounts, such as experience level, percentage, or affiliates.

1. **Setup > Lists > Resources**
2. Click **Pay Group.**
3. You can create new groups, edit, delete or merge groups, except the default pay group, which cannot be deleted or merged. For how to set up pay groups, see Customizing lists.

NEXT: Set up pay dates for the year

After setting up Pay Groups and at the beginning of each year, set up the year's pay dates and their corresponding cutoff dates for each pay group. Doing so drastically reduces the number of payroll errors caused by entering the wrong date when running payroll.

Reference

- Resources lists
- Pay Rate Groups
- Rates setup workflow

Step-by-step instructions

- Setting up pay dates
- Customizing lists

Tracking

Customize tracking options so you can monitor ordered service items as they move through your production workflow.

For how to set up lists, see Customizing lists.

- **Archival Status**

  Designation specifying archive status of media, e.g., Archived Here, Originals Destroyed, Originals Sent To, and Pending. Used in the **Media** pane of an Edit Tracking window.

- **Item**

  Types of service items that you or your resources produce and you want to track. Typical tracking item categories for court reporting and video production firms are DVD, Editing, Exhibit, Scanning, Synching, and Transcript.

- **Media Classification**

  Designation specifying restriction imposed on a media. Typical media classifications are Attorney's Eyes Only, Confidential, Highly Confidential, Restricted, and Under Protective Order.

- **Media Format**

  Types of media you produce. Typical media formats are Audio Tape, CD, DV-CAM, DVD-R, Hi-8, MiniDV, S-VHS, and Tape.

- **Priority**

  Designation specifying order of importance or urgency. Typical priority codes are High, Normal, and Urgent.

Reference

- Tracking
- Tracking setup workflow

Step-by-step instructions

- Customizing lists

Users

Anyone who accesses RB9 must have a user account.

For how to set up lists, see Customizing lists.

- **Department**

  Specialized division of your organization, e.g., Calendar or Production.

- **Title**

  Designation specifying position, e.g., Manager or Staff.

Reference

- Users and Groups
- Users

Step-by-step instructions

- Customizing lists
- Creating users

Witnesses

Most jobs in RB9 involve depositions of witnesses, persons with potentially relevant evidence to the issue being litigated.

For how to set up lists, see Customizing lists.

- **Notes Type**

  Categories of notes to use as a filter when searching Witness Notes Logs.

Reference

- Witness Record
- Notes Log

Step-by-step instructions

- Customizing lists
- Making entries in notes logs

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 RB9 lists. To:

- **Add a drop-down 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' RB Connect.
   - **Show to Resource** – If this option appears, slide to Yes to have the entry appear as a selection in resources' RB Connect.

   IMPORTANT: RB Connect functions might not work if no list entries are enabled

   If **Show to Contact** or **Show to Resource** are options for entries in a list, at least one entry must be enabled (Yes selected) 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 drop-down in RB 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 drop-down 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' RB Connect or slide to No to hide it from contacts.
     - **Show to Resource** – If this option appears, slide to Yes to have the entry appear as a selection in resources' RB Connect or slide to No to hide it from contacts.
     - **Do not attach any files from All-Resources-level, Firm-level, Job-level, and Case-level repository to Assignment Notification** – *(Jobs > Task only)* If this option appears, slide to Yes to not include these automatic file attachments to emails sent for the task.
     - **No Turn-in** – *(Jobs > Task only)* If this option appears, slide to Yes for tasks that are not turned in by resources.
  3. Click **Save.**

- ### Merge drop-down 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 RB9 will not have a **Merge To** option.)*

- ### Delete a drop-down 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 RB9.

- ### Hide a dropdown entry

  Some RB9 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. Slide **Active** to 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 RB9 and you are not allowed to hide it.
  3. Click **Save.**

Reference

- RB Connect
- Accounting list
- Cases list
- Connect list
- Contacts list
- Firms list
- Invoice list
- Jobs list
- Locations list
- Others list
- Production list
- Repository list
- Resources list
- Tracking list
- Users list
- Witnesses list

Step-by-step instructions

- Merging data

Users

Users are people in your company who access RB9 directly, such as owners, managers, and staff.

NOTE: Your user account determines what you can do in RB9

A user account lets you access RB9 directly. In addition to program access, your user account authorizes what actions you can perform in RB9. See Creating user accounts.

Administrators set up user accounts for anyone who needs to access RB9, and assign users to different groups, which authorize what actions users can perform in RB9 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 job 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

Creating user accounts

Set up user accounts for everyone who needs to access RB9. Store work-related and personal information about them. Give them user names and initial passwords to access RB9. (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 calendaring 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 (set in System Preferences > General > Login), enter the user's email address in **Email.** 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 RB9 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 job 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.
- 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
- Login preferences
- 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
- Managing user's group memberships

Entering & updating 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 drop-down.

- **Email**

  User's work email address. Click ✉ to send email directly to user. See Composing emails & text messages.

- **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 RB9, 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 RB9:

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. Job titles are set in Lists > Users.
- **Department**
  Specialized division of your organization. Departments 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 & text messages

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 . RB9 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 drop-down.

2. In the New User/Edit User window, click **Save.**

Reference

- Lookup panel
- Date Navigator

Step-by-step instructions

- Creating user accounts
- Managing users
- Managing groups

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 RB9 groups are listed (see Managing groups). Check the box(es) of group(s) the user should join (use Shift + Click to select or deselect a continguous range of boxes), or check the box in the header to select all.

- **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

- Lookup panel
- Date Navigator

Step-by-step instructions

- Creating user accounts
- Creating groups
- 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, RB9 also allows individual users to reset their own password in 2 ways:

- **Before log in** – See Setting your password at log-in.
- **Inside RB9** – See Updating your password.

Reference

- Login preferences
- Strong password

Step-by-step instructions

- Setting your password at log-in
- Updating your password

Unlocking user accounts

RB9 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 RB9 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, **Account is locked out** is set to Yes. Slide to No.
4. Click **Save.**

TIP: Unlocking contact & resource accounts

If a contact or resource has been locked out of RB Connect due to too many failed login attempts, unlock their account in the **Additional** pane of their entity listing. See Entering additional contact information and Entering additional resource 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** drop-down to allow a set amount of incorrect login attempts before RB9 locks out the user.

Reference

- Login preferences

Step-by-step instructions

- Managing users
- Customizing global preferences
- Entering additional contact information
- Entering additional resource information

Groups

Groups grant permission to users for which actions they can perform in RB9 and what kinds of notifications and messages they receive.

NOTE: 2 types of groups in RB9

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.

Reference

- Users
- Message groups
- Security groups

Step-by-step instructions

- Managing groups
- Communicating within RB9

Message groups

Message groups are custom groups you set up in RB9 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 RB9's Notifications and Messages window, you can send messages to individual users and/or message groups. (See Communicating within RB9.) Set up message groups, such as "Managers," "Everyone," and "Calendar," 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 RB9

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 RB9. 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 calendaring 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

Managing groups

RB9 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. RB9 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 RB9 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

Creating groups

Add new security groups with their own permissions and users if the default security groups provided with RB9 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 RB9.

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 RB9, see Setting security group permissions.

Reference

- Groups
- Users
- Message groups
- Security groups

Step-by-step instructions

- Adding or deleting group members
- Setting security group permissions

Setting security group permissions

An important security feature of RB9 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 RB9 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' RB9.
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 RB9

   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

- Managing groups
- Creating user accounts
- Creating groups
- Adding or deleting group members

Adding or deleting group members

Add members to or delete them from any 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 RB9 users that have been added to the database appear. (If a user is missing, see Creating user accounts.) Check the box(es) next to the member(s) you want to add or check the box next to **User** in the header to select all users.
  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 RB9 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 & updating general user information.

Reference

- Groups
- Users

Message groups

- Security groups

Step-by-step instructions

- Creating groups
- Creating user accounts
- Entering & updating general user information

Customizing accounts

RB9's Chart of Accounts comes with a default set of accounts, but you can add, edit, and delete list entries to match RB9 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 RB9. (Always check before adding a new account.) Restrict the results by clicking and selecting account type(s) to search. See Lookup Panel.
3. RB9 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 drop-down, if desired. (Account types and default are set up 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 drop-down, if desired.
   - **Account No.**
     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 window.

Reference

- Business units
- Lookup Panel
- Accounting lists
- Complete RB9 setup workflow

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. RB9 includes a default set of Service Subgroups. Some groups are required by RB9 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. RB9 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, 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
- Rates setup workflow

Step-by-step instructions

- Adding service items

Service items

Regular charges that you bill to your clients are called **service items** in RB9. 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 court reporters. These main categories are preset by the system and cannot be modified by the user.

Reference

- Service Items Master
- Service Items Subgroups
- Service items

Step-by-step instructions

- Organizing service items
- 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 drop-down.
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, pay rates, and other options for a service item, see Entering billing & pay 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.

NEXT: Set up rush rate tables to save time

Enter your company's expedited (rush) delivery services along with their default billing and pay information into the Rush Type Master. Instead of setting up billing rate tables for rush charge choices, use the Rush Type Master to set increases of your base rates for different expedited deliveries. This drastically reduces the number of billing rate tables you will need to set up.

Reference

- Service items
- Service Item Subgroups

- Service Groups
- Billing rates
- Electronic billing
- Rates setup workflow
- Rush Type Master

Step-by-step instructions

- Organizing service items
- Entering billing & pay rates
- Entering UTBMS codes for service items
- Setting up rush charge types
- Updating 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 drop-down 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 drop-down. (See Organizing service items.)
   - **Service Item**

     Enter part of a service item name.
   - **Show Active Only**

     Default is Yes. Leave as the default if you only want to see service items that you have designated as Active (see Entering billing & pay rates). If you want to see all service items, slide to No.
3. RB9 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 pay rates and related options for a service item, see Entering billing & pay rates.
3. To change billing or pay rates in multiple billing/pay 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 billing & pay rates
- Entering UTBMS codes for service items
- Merging data
- Updating rates in batches

Entering billing & pay 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. Not all options are available to update in all tables.

Continued from:

- *Adding service items*
- *Updating service items*
- *Creating billing rate tables*
- *Creating pay rate tables*
- *Adding & updating individual service items*
- *Applying rates*

1. Set defaults

In the New/Edit window, **Service Group** is uneditable, and some other options might not appear or be editable.

- **Service Subgroup**
  Editable in Service Item windows: 9. Misc. Charges Service Group only
  Select an appropriate subgroup in the drop-down. (See Organizing service items.)

- **Service Item**
  Editable in Service Item windows: 8. Attendance & 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 windows only
  Select the category in the drop-down for the billable units of this service item. RB9 prints the unit type on detailed invoices next to the number of units. Unit types are set in Lists > Accounting.

- **Account No.**
  In Service Item Master windows only
  Select an appropriate (revenue) account in the drop-down. Accounts are set in Chart of Accounts.

- **Active**

  In Service Item Master windows only
  Default is Yes. Slide to No when you no longer need to see the item in lists.

- **Billing Rate**
  In Service Item Master & Billing Rate windows only
  Enter the amount you charge per unit.

- **Minimum Billing**
  In Service Item Master & Billing Rate windows only
  Enter your minimum billing amount, if applicable.

- **Pay Rate Type**
  Specify whether you pay resources a flat amount ($) or a percentage of what's billed (%) for this service item.

- **Pay Rate**
  Enter the amount (or percentage) you pay per unit.

- **Minimum Pay**
  Enter the minimum pay amount, if applicable.

2. **Select options**

   Set sliders to Yes:

   - **Billing Rush Applicable**
     In Service Item Master & Billing Rate windows only
     If the Billing Rate increases when an order containing this service item is expedited. Generally this is set to No.

   - **Pay Rush Applicable**
     If the Pay Rate increases when an order containing this service item is expedited. Generally is set to No.

   - **Court Taxable**
     In Service Item Master & Billing Rate windows only
     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**
     In Service Item Master & Billing Rate windows only
     If the service item is sales taxable.

   - **Discountable**
     In Service Item Master & Billing Rate windows only

If you provide negotiated discounts for certain clients and the service item is discountable.

- **Pointable**

  In Service Item Master & Billing Rate windows only
  If 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.

- **Client Of Commissionable**

  In Service Item Master & Billing Rate windows only
  If you pay incentive commissions to resources who bring in their own clients and the service item is commissionable.

- **Sales Rep Commissionable**

  In Service Item Master & Billing Rate windows only
  If you have sales representatives (account executives) and the service item is commissionable.

- **Show text on invoices**

  In Service Item Master & Billing Rate windows only
  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 invoices**

  In Service Item Master & Billing Rate windows only
  To print the amount when an invoice is printed with "no details." If invoices are printed with details, this is ignored.

- **Show rush text on invoices**

  In New Service/View Service/Edit Service panel of Edit Turn In – Job# windows only, does not appear if service's Service Group is Original, Copy w/Original, Copy, or Additional Copy.
  To print the Bill Rush Name when an invoice is printed with "no details." If invoices are printed with details, this is ignored.

- **Show rush amount on invoices**

  In New Service/View Service/Edit Service panel of Edit Turn In – Job# windows only, does not appear if service's Service Group is Original, Copy w/Original, Copy, or Additional Copy.
  To print the rush 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 windows only

To make the service item available for clients to request when they are scheduling online using RB Connect.

- **Show on web turn-in**
  In Service Item Master windows only
  To make the service item available for resources to select when they are turning jobs in online using RB Connect.

- **Show on production sheets**
  In Service Item Master windows only
  To show the service item on production sheets. Leave blank if this item does not concern the production department.

- **Use Pages for calculation**
  In Service Item Master windows only
  To have the amount for this service item calculated using the Pages and Deduct pages of the witness like Original/Copy service items. (See Entering general witness information.) In the **Edit Service** panel of an invoice in Turn In the **Pages** field is displayed only for services where this option is set to Yes.

  TIP: Have units appear as (Pages * Units) on invoices

  You can have units appear as (Pages * Units) on invoices for service items with **Use Pages for calculation** set to Yes by setting **Use (Pages * Units) to print Units** to Yes in the **Print Options** pane in System Preferences > Billing > Invoice. See Invoice preferences.

NOTE: Need to update rates across multiple tables?
Use RB9's Mass Update function in the Service Item Master to change billing or pay rates in multiple billing/pay rate tables at once. See Updating rates in batches.

Reference

- Service items
- Service Groups
- Service Item Subgroups
- Accounting lists
- Chart of Accounts
- Award points
- Client Of
- Sales Rep
- RB Connect
- Invoice preferences
- Rates setup workflow

Step-by-step instructions

- Adding service items
- Updating service items
- Creating billing rate tables
- Creating pay rate tables
- Applying rates
- Organizing service items
- Setting up billing rates
- Setting up pay rates
- Managing contacts' award points
- Entering general witness 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 to revise all of the tables at once.

Continued from Adding rush charge types or Entering billing & pay rates.

1. In the Edit Rush Type/Edit Service Item window, update the rate information if needed.
2. Click **More >**
   - **Mass Update for Billing Rates:** To update rates and options in billing rate tables in more than one Billing Rate Group.
   - **Mass Update for Pay Rates:** To update rates and options in pay rate tables in more than one Pay Rate Group.
3. In the **Mass Update for Billing Rates/Pay Rates – Step 1** panel, set sliders to Yes for information that should be copied from the rush type/service item. (If updating billing rates from an Edit Service Item window, you can also select options from the **LEDES 1998B** pane to mass update. See Entering UTBMS codes for service items.)
4. Click **Next.**
5. In the **Mass Update for Billing Rates/Pay Rates – Step 2** panel, check box(es) for which group(s) should be updated (use Shift + Click to select or deselect a continguous range of boxes), or check the box in the header to select all.
6. Click **Update.**
7. If you made any changes to the rush type/service item, a popup will appear. Click **Yes.**

Reference

- Rush Types
- Service Items
- Billing Rates
- Pay Rates
- Billing Rate Group
- Pay Rate Group
- LEDES format

Step-by-step instructions

- Adding rush charge types
- Entering billing & pay 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.

NOTE: 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.

Reference

- Electronic billing
- LEDES format
- UTBMS codes
- ABA Litigation Code Set
- Billing Rates

Step-by-step instructions

- Adding service items
- Updating service items
- Exporting invoices in LEDES format
- Setting up billing rates

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 Witnesses
L420 Expert Witnesses
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 Witness 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

Setting up rush charge types

Instead of setting up extra billing and pay tables devoted to rush charges, set up rush types in the Rush Type Master that increase your base billing and pay rates by a flat fee or a percentage.

RB9 comes with a default list of rush charge types that you can edit, delete, merge, or add new ones to.

1. **Setup > Rush Type Master**
2. Click to see your active rush types. If you want to see all existing rush types, slide **Show Active Only** to No, then click .
3. To:

   - ### Create a new rush type

     Click **New.** See Adding rush charge types.

   - ### View a rush type's details

     In the results grid click its:

     - **> View.**
     - Hyperlinked name.

   - ### Edit a rush type

     In the results grid click its:

     - **> Edit.**
     - Hyperlinked name. Then in the View Rush Type window, click **Edit.** See Adding rush charge types.

     #### TIP: Update multiple rush types at once

     You can select options in one rush type and copy them to multiple other rush types at once by using Mass Update in the Edit Rush Type window. See Adding rush charge types.

   - ### Delete a rush type

     1. In the results grid click its:

        - **> Delete.**
        - **> View/Edit** or the hyperlinked name. Then in the View Rush Type/Edit Rush Type window, click **Delete.**

2. Click **Yes** in popup window.

- **Merge rush types**

  See Merging data.

NEXT: Save time when billing by organizing rates into groups

Set up Billing Rate Groups, basic categories of billing rates, such as Standard, Preferred, and specific cases. Billing Rate Groups are similar to Service Subgroups. (in Setup > Lists > Accounting menu)

Reference

- Rates setup workflow
- Rush types
- Billing Rate Groups
- Accounting lists

Step-by-step instructions

- Adding rush charge types
- Merging data

Adding rush charge types

Set up your Rush Type Master list of rush charges before setting up your billing rate and pay rate tables. You can update rush charges at any time and update multiple rush types at the same time.

Continued from Setting up rush charge types.

1. In the New Rush Type/Edit Rush Type window, enter/update the entries:

- ***Rush Type**

  Required. Short notation to be displayed in the drop-down.

- ***Bill Rush Name**
  (the text to be printed on invoices)
  Required. Description of the rush fee that appears on invoices.

- **Bill Rate Type**

  Specify whether the base billing rate is increased by a flat amount ($) or a percentage (%).

- **Bill Rate**

  Default amount or percentage by which the base billing rate is increased, unless it varies for each billing rate group, then leave as zero (0).

- ***Pay Rush Name**

  Required. Description to be printed on resource pay reports.

- **Pay Rate Type**

  Specify whether the base pay rate is increased by a flat amount ($) or a percentage (%).

- **Pay Rate**

  Default amount or percentage by which the base pay rate is increased, unless it varies for each billing rate group, then leave as zero (0).

- **Show text on invoice**

  Slide to Yes to print the Bill Rush Name when an invoice is printed with "no details."

- **Show amount on invoice**

  Slide to Yes to print the amount when an invoice is printed with "no details."

- **Active**

  Default is Yes. Slide to No to have the rush rate not appear as a choice when billing.

NOTE: What to include in rush charges

If using a flat amount for Bill Rate or Pay Rate, enter the expedite portion only of each rush charge (the difference between your O&1 base rate and the rush charge's total expedite amount). When billing, RB9 calculates the rush charge amount by adding the expedite amount entered in these fields to the O&1 base rate.

2. If you have multiple rush types that you want to update to one or more of the same values/options in this table, use the **Mass Update** options to update them all at once. See Updating rates in batches.

3. To save the rush charge type:

   - **In the Edit Rush Type window** – Click **Save.**
   - **In the New Rush Type window** – Click **Save >**
     - **Save & New:** To add the rush type to the Rush Type Master and continue adding rush charge types.
     - **Save & Close:** When you are finished adding rush charge types.

BEST PRACTICES: Set up rush rates before billing and pay rate table

Set up your Rush Type Master before setting up individual billing and pay rate tables. That way, your default rush rates from this master template automatically fill in when you create an individual rate table. You can override rush defaults in individual rate tables to accommodate any special pricing or pay arrangements that should be included in a particular rate table.

NEXT: Save time when billing by organizing rates into groups

Set up Billing Rate Groups, basic categories of billing rates, such as Standard, Preferred, and specific cases. Billing Rate Groups are similar to Service Subgroups. (in Setup > Lists > Accounting menu)

Reference

- Rates setup workflow
- Rush types
- Billing Rate Groups
- Accounting lists

Step-by-step instructions

- Updating rates in batches
- Customizing lists

Rush Types

Rush types increase your base billing and pay rates by a flat fee or a percentage. Rush types and amounts for billing clients can be different from those for paying resources.

Reference

- Rates setup workflow
- Billing rates
- Pay rates

Step-by-step instructions

- Setting up rush charge types
- Setting up billing rates
- Setting up pay rates

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 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: Set up Pay Rate Groups

After setting up billing rates, set up Pay Rate Groups to categorize resources, such as by experience levels and affiliate agencies. (in Setup > Lists > Accounting menu)

Reference

- Billing Rate Groups
- Pay Rate Groups
- Resources
- Accounting lists
- Rates setup workflow

Step-by-step instructions

- Customizing lists
- Creating billing rate tables
- Copying billing rate tables
- Setting up pay rates

Creating 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.

Continued from Setting up billing rates or Copying billing rate tables.

1. Enter basic details

1. In the New Billing Rate window:

   - **Billing Rate Group**
     Default group appears (set in Lists > Accounting). Select a different billing rate group in the drop-down, if the new billing rate table should be in a different category.

   - ***Billing Rate Name**
     Required. Enter a 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 drop-down. 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 drop-downs.

   - **Remarks**
     Enter any relevant notes or comments.

2. Click **Save.** Window changes to Edit Billing Rate and adds Service Item and Rush panes.

2. Enter 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 billing & pay rates.

3. **To update any rush charges for this billing rate table,** scroll or jump to the **Rush** pane. Then click the hyperlinked **Rush Type** you want to edit. See Setting up rush charge types.

4. Click **Save.**

NOTE: Tying billing rates to entities

You connect the billing rates to firms, contacts, and parties to a case or job. 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 cases/jobs or when turning in jobs.

NEXT: Set up Pay Rate Groups

After setting up billing rates, set up Pay Rate Groups to categorize resources, such as by experience levels and affiliate agencies.

Reference

- Billing Rate Groups
- Accounting lists
- Firms
- Contacts
- Parties
- Resources
- Pay Rate Groups
- Rates setup workflow

Step-by-step instructions

- Setting up billing rates
- Copying billing rate tables
- Entering billing & pay rates
- Setting up rush charge types
- Creating Pay Rate Groups

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, see Creating billing rate tables.

Reference

- Billing Rate Groups
- Lookup panel
- Rates setup workflow

Step-by-step instructions

- Setting up billing rates
- Creating 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 cases/jobs 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 single case

Reference

- Billing Rates
- Firm
- Contact
- Parties
- Accounting lists
- Rates setup workflow

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 RB9 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 RB9 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
- Accounting lists
- Service Item Master
- Rush Type Master
- Rates setup workflow

Step-by-step instructions

- Customizing lists
- Setting up billing rates

Setting up pay rates

After setting up Pay Rate Groups, enter your pay 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 pay rate tables 2 ways:

- **From scratch**
  To fill a new blank table with pay rates:

  1. **Setup > Pay Rates**
  2. Click **New.** To set up the table, see Creating pay rate tables.

- **From an existing table**
  Copy and update an existing table to create a new table quickly.

TIP: Delete unneeded tables

If you set up a pay rate table and later determine you don't need it, delete it to keep your lists of pay rates managable.

1. To delete a pay rate table:
   - **From the Pay Rates main screen,** find the pay rate table you want to delete and click its **> Delete.**
   - **In a View Pay Rate/Edit Pay Rate window**, click **Delete.**
2. Click **Yes** in the popup.

Reference

- Pay Rate Groups
- Rates setup workflow

Step-by-step instructions

- Creating pay rate tables
- Copying pay rate tables

Creating pay rate groups

Make Pay Rate Groups based on how you classify resources for payment purposes. For example, if you use a tiered system with different pay scales for different levels of experience and credentials, or if you pay different resources different percentages of billable items, create groups based on those classifications.

1. **Setup > Lists > Accounting**
2. Click **Pay Rate Group.**
3. You can create new groups, edit, delete, or merge groups, except the "Standard" Pay Rate Group which is included in RB9 and cannot be deleted or merged. For how to set up Pay Rate Groups, see Customizing lists.

NEXT: Populate your Pay Rate Groups

After setting up a pay rate group, create its related pay rate tables and attach resources to the group. Each Pay Rate Group can have an unlimited number of pay rate tables, so create as many pay rate tables as you need.

Reference

- Lists > Accounting
- Billing Rate Group
- Pay Rates
- Rates setup workflow

Step-by-step instructions

- Customizing lists
- Entering pay information
- Setting up pay rates

Copying pay rate tables

Copy and update an existing pay rate table to create a new table quickly.

1. Find table to copy

1. **Setup > Pay Rates**
2. Click to see all of your active existing tables. Or restrict the results using one or more search criteria before clicking :

   - **Pay Rate Group**

     Default is ALL. Click to restrict the search to one group or several. See Lookup panel.

   - **Pay Rate Name**

     Enter part of the pay rate name.

   - **Show Active Only**

     Default is Yes. To search all pay rates, slide to No.

2. Copy table

1. Click a hyperlinked **Pay Rate Name** to copy.
2. In the View Pay Rate window, click **Edit.**
3. Click **More > Copy & New.**

3. Update info

In the New Pay Rate window, ***Pay Rate Name** *(required)* is blank, but the rest of the rate table is copied. To update, see Creating pay rate tables.

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

- Pay Rate Groups
- Billing Sets
- Rates setup workflow

Step-by-step instructions

- Entering billing & pay rates
- Setting up rush charge types
- Setting up billing sets
- Creating pay rate tables

Pay Rate Group

Similar to Billing Rate Groups, **Pay Rate Groups** make running payroll easier because RB9 automatically fills in resources' pay depending on which group they belong to. A resource must be connected to a pay rate group.

Pay Rate Group examples

- RealTime
- RealTime-Senior
- 70%
- Level 1
- Partners
- ABC Court Reporting (affiliate firm)

Reference

- Accounting lists
- Billing Rate Group
- Pay Rates
- Rates setup workflow

Step-by-step instructions

- Creating Pay Rate Groups

Setting up billing sets

Set up a new billing set anytime you find yourself selecting the same set of services for multiple jobs.

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.
   - **Show on Resource Turn-in**
     If resources turn in through RB Connect, slide to Yes to give them the option to use this billing set.
   - **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 drop-down.
   - **Service Subgroup**
     Select a service subgroup in the drop-down.

- **Service Item**
  Select a service item in the drop-down.

- **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: Set up resource pay periods

If resources have different pay dates or cutoff dates, group them according to their pay period (frequency). Then set up the year's pay dates for each group. Pay Groups are unrelated to Pay Rate Groups, which classify resources according to their pay tier.

Reference

- RB Connect
- Service Group
- Service Subgroup
- Service items
- Pay Groups
- Cutoff Date
- Pay Rate Groups
- Rates setup workflow

Step-by-step instructions

- Managing billing sets
- Setting up pay dates

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
- Rates setup workflow

Step-by-step instructions

- Setting up billing sets

Setting up pay dates

After setting up Pay Groups and at the beginning of each year, set up the year's pay dates and their corresponding cutoff dates for each pay group. Doing so drastically reduces the number of payroll errors caused by entering the wrong date when running payroll.

1. Enter new pay date

1. **Setup > Pay Dates**
2. In the Pay Dates **Search By** pane, **Year From/Year To** default to the current year. Click to check which pay dates have already been entered into RB9.
3. To add a pay date, click **New.**

2. Add pay date information

1. In the New Pay Date window:
   - ***Pay Date**

     Required. Enter/select date checks will be issued (Date Navigator).
   - ***Cutoff Date**

     Required. Enter/select the last date for invoices to be included in this pay date (Date Navigator).
   - **Pay Group**

     Default is set in Lists > Resources. Select a different group in the drop-down, if desired.
   - **1099-Issuing Business Unit**

     Select a business unit that will be issuing 1099s (i.e., your main office) in the drop-down.
   - **Remarks**

     Enter a description of this Pay Date listing.
2. In the ***Business Units to include** pane, click *(required).*
3. In the **Add Business Units** panel, check the **BU ID** boxes of business units whose jobs should be included in this payroll. Check the box in the header to include all BUs. At least one BU must be selected.

4. Click **Save.**

3. Save date

In the New Pay Date window, click **Save >**

- **Save & New:** To save the pay date listing and add more.
- **Save & Close:** When you have no more pay dates to add.

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 RB9 defaults. Then add invoice messages to give your clients more information.

Reference

- Pay Group
- Date Navigator
- Cutoff Date
- Resources lists
- Business Units
- Invoice Headers
- Invoice Messages
- Rates setup workflow

Step-by-step instructions

- Setting up invoice headers
- Managing pay dates

Cutoff Date

Cutoff Date is the last date for invoices to be included in a pay date.

TIP: Using payment date instead of invoice date

RB9 calculates resource payment cutoff dates using invoice dates by default. If you want to pay some resources by invoice date and others by payment date, see Entering pay information. If you want to always use the date payment was made instead of invoice dates, see Entering BU preferences.

Reference

- Pay Dates

Step-by-step instructions

- Setting up pay dates
- Entering pay information
- Entering BU preferences

Managing pay dates

View details about set pay dates and enter notes about specific pay dates. If dates changed or you discover any mistakes after setting up pay dates, you can delete any pay date that you haven't close payroll for.

1. **Setup > Pay Dates**
2. In the Pay Dates **Search By** pane,***Year From/*Year To** default to the current year. Click:
   - to check which pay dates have been entered into RB9 for this year.
   - next to ***Year From/*Year To** to change the date range. Then click .
3. RB9 displays the pay dates that fit your search. To:
   - **View a pay date's details,** click its **> View** or hyperlinked **Pay Date** in the Pay Dates results grid.
   - **Add remarks to a pay date,** click its **> Edit** in the Pay Dates results grid. Or click its **> View** or hyperlinked **Pay Date** in the Pay Dates results grid, then click **Edit** in the View Pay Date window.
   - **Delete an open pay date,** click its **> Delete** in the Pay Dates results grid. Or click **Delete** in the View Pay Date/Edit Pay Date window. *(These options are not available if payroll has already closed for the date selected.)* Then click **Yes** in the popup that appears.

Reference

- Rates setup workflow

Step-by-step instructions

- Setting up pay dates

Setting up invoice headers

In addition to the included invoice headers in RB9, you can create your own, customized for specific circumstances. Organize your custom headers into groups to save time locating one when billing.

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 RB9. You can restrict the results by clicking and selecting group(s) to search. See Lookup Panel.
3. RB9 displays the results. To:
   - **View a header** – Click its **> View** or hyperlinked text.
   - **Edit a header** – Click its **> Edit.** Or click **Edit** in the View Invoice Header window.
   - **Create a new header** – Click **New.**

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 drop-down 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 more.
  - **Save & Close:** When you have no more headers to add.

NOTE: Create headers on the fly

You can create headers when generating invoices. RB9 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 with by creating invoice messages to give your clients more information.

TIP: Delete unneeded invoice headers

When you no longer need one of your custom headers, delete it to keep your list of invoice headers managable.

1. To delete an invoice header:
   - **From the Invoice Headers main screen,** find the invoice header you want to delete and click its **> Delete.**
   - **In a View Invoice Header/Edit Invoice Header window**, click **Delete.**
2. Click **Yes** in the popup.

Reference

- Invoice lists

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.

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 RB9. You can restrict the results by clicking and selecting group(s) to search. See Lookup Panel.
3. RB9 displays the results. To:
   - **View a message** – Click its **> View** or hyperlinked text.
   - **Edit a message** – Click its **> Edit.** Or click **Edit** in the View Invoice Message window.
   - **Create a new message** – Click **New.**

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 drop-down 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 emails, messages, web pages, & stamps. 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 more.
- **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.

TIP: Delete unneeded invoice messages

When you no longer need one of your custom messages, delete it to keep your list of invoice messages managable.

1. To delete an invoice message:
   - **From the Invoice Message main screen,** find the invoice message you want to delete and click its **> Delete.**
   - **In a View Invoice Message/Edit Invoice Message window**, click **Delete.**
2. Click **Yes** in the popup.

Reference

- Invoice Headers
- Lookup Panel
- Invoice lists

Step-by-step instructions

- Customizing emails, messages, web pages, & stamps

Customizing State dropdowns

Customize the list of states that appear in dropdowns in RB9. Add states for countries other than the USA. Edit or delete states in the list. Shorten State dropdown lists by hiding states you don't use but which are required by the system.

1. View states in your RB9 database

1. **Setup > States**
2. In the States window, **Country** defaults to ALL. Click to see all of the states in your RB9 State list. You can restrict the results to a single country by selecting it in the dropdown.
3. RB9 displays the results. You can view a state by clicking its **> View** or hyperlinked text. Or:

2. Update an existing state

Not applicable to states in the United States

1. In the States window, click the state's **> Edit.** Or click **Edit** in the View State window.
2. In the Edit State window, **Country** and **State Abbreviation** are uneditable. Edit the text in the ***State Name** field.
3. Click **Save** to update the state.

3. Add a state

1. In the States window, click **New.**
2. In the New State window, select the state's country in the ***Country** dropdown. *Required.*
3. Enter the state's name in ***State Name** exactly as you want it to appear in dropdowns. *Required.*
4. Enter the shortened version of the state's name in **State Abbreviation.**
5. Click **Save >**
   - **Save & New:** To save the state and add more states.
   - **Save & Close:** When you have no more states to add.

4. Delete a state

Delete custom states you don't use to keep your list of states managable. If you cannot delete a state, you can hide it so it doesn't appear in **State** dropdowns.

1. States you can delete will include a **Delete** option:
   - **From the States main screen,** find the state you want to delete and click its **> Delete.**
   - **In a View State/Edit State window**, click **Delete.**
2. Click **Yes** in the popup.

5. Hide a state

1. If you cannot delete a state but don't want it to appear in State dropdowns, click its **> Edit** in the States window. Or click **Edit** in the View State window.
2. In Edit State window, slide **Active** to No.
3. Click **Save.**

Defining tracking steps

RB9 Standard only

After setting up item types to be tracked, create steps that each kind of item goes through in your production 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. Update tracking steps or delete them as needed.

1. **Setup > Tracking Steps**
2. In Tracking Steps window, click 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:
   - ***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 **Active** slider 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 RB9 will send to their RB9 inbox when the milestone is reached.

1. To automatically alert users when a step is completed so they can proceed with the next production step, click in Edit Tracking Step window's **Users to notify** pane.
2. In the **Add Users** panel, check the box(es) of RB9 user(s) to be notified. See Lookup panel.
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 RB9 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
   - **Active**

     Slide to No if you don't want the step to appear in Tracking.
   - **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 RB9 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.

NEXT: Set options for different tracking areas

Before starting to track work, specify codes for different areas in tracking. The first set of these codes, Archival Status, describes the current archival status of original media, such as video tapes. Media classification specifies who has rights to view/handle the media. Media format codes specify the types of media you produce, such as DVD or audio tape. Priority codes specify order of importance or urgency. Options are set in Lists > Tracking.

Reference

- Tracking lists
- Notifications and Messages
- Lookup panel

Step-by-step instructions

- Customizing lists

Setting global RB-PDF Transcript preferences

RB9 Standard only

Before creating RB-PDF Transcripts, set preferences for their appearance and what options they will include. Create multiple transcript profiles to cover different criteria, such as individual state requirements or client preferences. Global preferences can be overridden when creating individual transcripts.

1. **Setup > PDF Transcript Preferences**
2. In the PDF Transcript Preferences window, all existing RB-PDF Transcript profiles are listed. Click a transcript profile to select it.
3. In the **View PDF Transcript Preference** panel, click:
   - **Edit** – To edit the transcript profile's preferences.
   - **Copy & New** – To create an additional transcript profile.
4. To update defaults and make selections in the Edit PDF Transcript Preference window's:
   - **General** pane, see Setting general PDF preferences.
   - **Header & Footer** pane, see Setting RB-PDF Transcript header & footer preferences.
   - **Word Index & Word List** pane, see Setting word index & word list preferences.
   - **Condensed Transcript** pane, see Setting condensed transcript preferences.
   - **PDF File Properties** pane, see Setting RB-PDF Transcript file preferences.
   - **Cover Page & Errata Sheet** pane, see Setting cover page & errata sheet preferences.
   - **Digital Signature** pane, see Setting RB-PDF Transcript digital signature preferences.
   - **Exclude Word** pane, see Setting RB-PDF Transcript word exclusion preferences.
5. Click **Save.**

NOTE: Managing transcript profiles

Designate your most-used profile as your default by clicking **Set as Default** in its Edit window. The default profile has "(default)" appended to its name in the PDF Transcript Preferences list.

If you no longer need a transcript profile, click **Delete** in its Edit window. Then click **Yes** in the popup that appears. This will help keep your list of profiles manageable and make it easier to find and select a profile.

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Setting general PDF preferences
- Setting RB-PDF Transcript header & footer preferences
- Setting word index & word list preferences
- Setting condensed transcript preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences
- Setting RB-PDF Transcript word exclusion preferences

Setting general RB-PDF Transcript preferences

RB9 Standard only

Set overall preferences for the appearance and basic options of transcripts created using a particular PDF Transcript profile.

Continued from Setting global RB-PDF Transcript preferences, Creating PDF transcripts or Previewing transcript packages.

1. In the **General** pane of the Edit PDF Transcript Preference window/Select PDF Transcript Preference window or the **Export – Full-page Transcript** panel of the Transcript Package window, update defaults and make selections *(not all choices available in each function):*

   - ***Preference Name**

     Required. Make the name something easily identifiable so users can choose the correct profile when producing RB-PDF Transcripts.

   - **Paper Size**

     - **Letter** – Default. Standard 8-1/2x11" sheet.
     - **Legal** – 8-1/2x14" sheet.
     - **Custom Size** – If you need a different sheet size than the existing sizes, select this, then edit measurements in **Paper Width/Height.**

   - **Paper Width**

     Editable field if Custom Size is selected in **Paper Size.** Update the measurement in inches.

   - **Paper Height**

     Editable field if Custom Size is selected in **Paper Size.** Update the measurement in inches.

   - **Margin Top/Margin Bottom/Margin Left/Margin Right**

     Space from edge of paper to contents. Each margin can be a different amount. Update the measurements in inches.

   - **Border Top/Border Bottom/Border Left/Border Right**

     Optional outlines around page contents. Each side can get a different treatment. Select one in each drop-down:

     - **Single** – Default. One-line border.
     - **None** – No border.

- **Double** – Two-lines border.

- ### Border Thickness

  Select a line width (stated in point percentage) from the drop-down.

- ### Show divide line for numbers

  Slide to Yes if you want to separate line numbers from the transcript contents with a vertical rule line.

- ### Make line numbers outside the box

  Slide to Yes if you want to place line numbers outside borders. (Choosing this option sets all borders to single width.)

- ### Timestamp Location

  - **Left** – Default. If timestamps appear in the ASCII file, they will appear to the left of where they were applied.
  - **None** – No timestamps will appear on your PDF transcripts.
  - **Right** – If timestamps appear in the ASCII file, they will appear to the right of where they were applied.

- ### Font Name

  Select a typeface in the drop-down.

- ### Font Bold

  Slide to Yes if you want to use the boldface version of the font selected in **Font Name.**

- ### Q&A Bolding

  - **Questions Only** – Default. Questions in their entirety will be displayed in boldface.
  - **None** – No questions or answers will appear in boldface.
  - **Letter Q Only** – Initial letter Q will appear in boldface, but question contents will not.
  - **Answers Only** – Answers in their entirety will be displayed in boldface.
  - **Letter A Only** – Initial letter A will appear in boldface, but answer contents will not.
  - **Questions and Answers** – Everything in Q&A format will appear in boldface.
  - **Letter Q and A** – Both initial letters Q and A will appear in boldface, but question

and answer contents will not.

- **Q&A Color**

  Default is black. If you want to use color to make question and answer segments stand out, see Picking colors in RB9.

- **Show edit original ASCII screen**

  Slide to Yes if you want the option to edit the original ASCII before creating PDF transcripts.

- **Attach original ASCII file**

  Not allowed for PDF/A-1a or 2a formats

  Slide to Yes if you want to include (as an attachment) the ASCII file that was used to create the PDF transcript.

- **Attach AMICUS file**

  Not allowed for PDF/A-1a or 2a formats

  Slide to Yes if you want to include (as an attachment) the original ASCII file saved in Amicus format.

- **PDF format**

  Default is PDF. If you want to create archival PDFs, select a PDF/A format in the drop-down. Some PDF options are not available in PDF/A transcripts. See PDF/A.

2. Scroll or jump to the **Header & Footer** pane (see Setting RB-PDF Transcript header & footer preferences) or another pane to update.

Reference

- RB-PDF Transcripts
- ASCII
- Amicus
- PDF/A

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Creating PDF transcripts
- Previewing transcript packages
- Picking colors in RB9
- Setting RB-PDF Transcript header & footer preferences
- Setting word index & word list preferences
- Setting condensed transcript preferences

- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences
- Setting RB-PDF Transcript word exclusion preferences

Setting RB-PDF Transcript header & footer preferences

RB9 Standard only

Set overall preferences for headers and footers of transcripts created using a particular PDF Transcript profile. Preferences made under Header applies to information that appears at the top of each page. Preferences made under Footer applies to information that appears at the bottom of each page.

Continued from Setting global RB-PDF Transcript preferences or Creating PDF transcripts.

1. Scroll or jump to the **Header & Footer** pane in the Edit PDF Transcript Preference window/Select PDF Transcript Preference window.
2. Update defaults and make selections in the Header and Footer sections:
   - **Font Name**

     Select a typeface in the drop-down.
   - **Font Size**

     Select a type size in points in the drop-down.
   - **Font Bold**

     Slide to Yes if you want to use the boldface version of the font selected in **Font Name.**
   - **Font Italic**

     Slide to Yes if you want to use the italic/oblique version of the font selected in **Font Name.**
   - **Left Section/Center Section/Right Section**

     Each section has 2 fields. In each field in each section, update defaults by:
     - Entering/editing text.
     - Adding data fields where you want to add RB9 job data by clicking and making selections in the contextual drop-downs.
     - Deleting data fields.
   - **Logo Image Position**

     Choose an option in the drop-down.
   - **Always print header/footer even if there is no page number in ASCII**

     Check if you always want headers or footers to print.
3. Scroll or jump to the **Word Index & Word List** pane (see Setting word index & word

list preferences) or another pane to update.

NOTE: Header/footer content shrinks to fit

If the contents of a transcript's header or footer are too long in the selected font size, RB9 will automatically shrink the text size to fit the width of the document.

Reference

- RB-PDF Transcripts
- ASCII

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Creating PDF transcripts
- Setting general PDF preferences
- Setting word index & word list preferences
- Setting condensed transcript preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences
- Setting RB-PDF Transcript word exclusion preferences

Setting word index & word list preferences

RB9 Standard only

Set overall preferences for the appearance and basic options of word indexes and word lists belonging to transcripts created using a particular PDF Transcript profile.

Continued from Setting global RB-PDF Transcript preferences or Creating PDF transcripts.

1. Scroll or jump to the **Word Index & List** pane in the Edit PDF Transcript Preference window/Select PDF Transcript Preference window.
2. Update defaults and make selections in the **Word Index** and **Word List** sections:
   - **Columns**

     Select the number of columns you want the word index/word list broken down into from the drop-down.
   - **Pagination**
     - **Start at 1**– Default. The word index/word list has its own page numbering.
     - **Continue from Transcript** – The word index/word list begins its numbering after the last page number in the transcript.
   - **Font Name**

     Select a typeface in the drop-down.
   - **Font Size**

     Select a type size in points in the drop-down.
   - **Border Top/Border Bottom/Border Left/Border Right**

     Optional outlines around page contents. Each side can get a different treatment. Select one in each drop-down:
     - **Single** – Default. One-line border.
     - **None** – No border.
     - **Double** – Two-lines border.
   - **Location**

     Select where you want the word index/word list in relation to the transcript in the drop-down:
     - **Attach to Transcript** – Default. A separate document in the transcript file.
     - **None** – No word index/word list. Use this option when creating PDF/A-1a & 2a transcripts.

- **Append to Transcript** – Included in the transcript itself.
- **Separate Document** – A separate file.

- ### Show Word Count

  Word List only

  Slide to Yes to include the number of times each word in the list appear in the transcript.

- ### Use different margin

  Slide to Yes to set margins for word indexes/word lists that are not the same as the main transcript margins.

- ### Margin Top/Margin Bottom/Margin Left/Margin Right

  If Use different margin selected

  Measurement of the space from edge of paper to contents in inches. Each margin can be a different amount.

3. Each entry in the **Quick Word Index** appears as a bookmark on the Bookmarks tab in RB-PDF Transcripts. If you want to include a hyperlinked word index in the navigation pane, specify the following:

   ### Style

   Select one in the drop-down:

   - **None** – Default. If you don't want a hyperlinked word index in the navigation pane. Use this option when creating PDF/A transcripts.
   - **Simple** – If you want a hyperlinked word index in the navigation pane.

   ### NOTE: If an RB-PDF Transcript has bookmarks, they appear automatically

   When opening RB-PDF Transcripts containing bookmarks or attachments, the Bookmarks pane appears automatically so clients can navigate the transcript easier.

4. Scroll or jump to the **Condensed Transcript** pane (see Setting condensed transcript preferences) or another pane to update.

Reference

- RB-PDF Transcripts
- Word Index
- Word List
- PDF/A

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Creating PDF transcripts
- Setting general PDF preferences
- Setting RB-PDF Transcript header & footer preferences
- Setting condensed transcript preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences
- Setting RB-PDF Transcript word exclusion preferences

Setting condensed transcript preferences

RB9 Standard only

Set preferences for the appearance and basic options of condensed transcripts created using a particular PDF Transcript profile.

Continued from Setting global RB-PDF Transcript preferences or Creating PDF transcripts.

1. Scroll or jump to the **Condensed Transcript** pane in the Edit PDF Transcript Preference window/Select PDF Transcript Preference window.
2. Update defaults and make selections:

- **Font Name**

  Select a typeface in the drop-down.

- **Font Scale Mode**

  - **Single Page** – Default. Font size might change from page to page but will use maximum (largest) font size for condensed print.
  - **Whole Page** – Font size will be consistent throughout the document.

- **Layout**

  - **2 columns x 2 rows (4 per page)** – Default.
  - **2 columns x 1 rows (2 per page)** – Print 2 ASCII pages to a single page in landscape mode only.

- **Page Order**

  - **Vertical** – Default. The reduced-size pages will appear on the page reading from top down, then left to right.
  - **Horizonal** – The reduced-size pages will appear on the page reading from left to right, then top down. Not available with "2 columns x 1 rows (2 per page)" option in **Layout.**

- **Border Top/Border Bottom/Border Left/Border Right**

  Optional outlines around page contents. Each side can get a different treatment. Select one in each drop-down:

  - **Single** – Default. One-line border.
  - **None** – No border.
  - **Double** – Two-lines border.

- **Show divide line for numbers**

  Slide to Yes if you want to separate line numbers from the transcript contents with a vertical rule line.

- **Page Number Position**
  - **Top Right** – Default. In the margin above the reduced-size transcripts pages.
  - **Bottom Right** – In the margin below the reduced-size transcripts pages.
- **Location**
  - **Separate Document** – Default. A separate file.
  - **None** – No condensed transcript. Use this option when creating PDF/A-1a & 2a transcripts.
  - **Attach to Transcript** – A separate document in the transcript file.
- **Q&A Bolding**
  - **Questions Only** – Default. Questions in their entirety will be displayed in boldface.
  - **None** – No questions or answers will appear in boldface.
  - **Letter Q Only** – Initial letter Q will appear in boldface, but question contents will not.
  - **Answers Only** – Answers in their entirety will be displayed in boldface.
  - **Letter A Only** – Initial letter A will appear in boldface, but answer contents will not.
  - **Questions and Answers** – Everything in Q&A format will appear in boldface.
  - **Letter Q and A** – Both initial letters Q and A will appear in boldface, but question and answer contents will not.
- **Q&A Color**

  Default is black. If you want to use color to make question and answer segments stand out, see Picking colors in RB9.

- **Word Index Location/Word List Location**

  if you want to attach or append a word index or word list.
  - **Attach to Condensed Transcript** – Default. A separate document in the transcript file.
  - **None** – No word index/word list. Use this option when creating PDF/A-1a & 2a transcripts.

- **Append to Condensed Transcript** – Included in the transcript itself.

- **Use different margin**

  Slide to Yes to set margins for condensed transcripts that are not the same as the main transcript margins.

- **Margin Top/Margin Bottom/Margin Left/Margin Right**

  If Use different margin selected

  Measurement of the space from edge of paper to contents in inches. Each margin can be a different amount.

3. Scroll or jump to the **PDF File Properties** pane (see Setting RB-PDF Transcript file preferences) or another pane to update.

Reference

- RB-PDF Transcripts
- PDF/A
- Word Index
- Word List

Step-by-step instructions

- Creating PDF transcripts
- Picking colors in RB9
- Setting general PDF preferences
- Setting RB-PDF Transcript header & footer preferences
- Setting word index & word list preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences
- Setting RB-PDF Transcript word exclusion preferences

Setting RB-PDF Transcript file preferences

RB9 Standard only

Customize default file-identifying information for transcripts created using a particular PDF Transcript profile.

Continued from Setting global RB-PDF Transcript preferences or Creating PDF transcripts.

1. Scroll or jump to the **PDF File Properties** pane in the Edit PDF Transcript Preference window/Select PDF Transcript Preference window.
2. Update defaults by entering/editing text, adding data fields by clicking and making selections in the contextual drop-downs, and/or deleting data fields:
   - **Title**

     The default merge data field is the witness name. Many search engines use the title to describe the document in their search results list.
   - **Author**

     The default merge data field is the name of the business unit that handled the job.
   - **Subject**

     The default merge data field is the case name.
   - **Keywords**

     The default merge data fields are job number, job date, resource and case number. Keywords make files easier to search.
3. Scroll or jump to the **Cover Page & Errata Sheet** pane (see Setting cover page & errata sheet preferences) or another pane to update.

Reference

- RB-PDF Transcripts
- Business Units

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Creating PDF transcripts
- Setting general PDF preferences
- Setting RB-PDF Transcript header & footer preferences
- Setting word index & word list preferences
- Setting condensed transcript preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences
- Setting RB-PDF Transcript word exclusion preferences

Setting cover page & errata sheet preferences

RB9 Standard only

Set preferences for cover pages and errata sheets of transcripts created using a particular PDF Transcript profile.

Continued from Setting global RB-PDF Transcript preferences or Creating PDF transcripts.

1. Scroll or jump to the **Cover Page & Errata Sheet** pane in the Edit PDF Transcript Preference window/Select PDF Transcript Preference window.
2. Update defaults and make selections:

   - **Cover Page**

     Not allowed for PDF/A formats

     Click **>**

     - **Lookup Cover Page** – If you want to include a cover page in transcripts created using the selected profile. In the **Select a Cover Page** panel, any default cover page templates appear in the **Form** pane. Click a hyperlinked cover page template to select it. Cover page templates are created and stored in Form Templates.
     - **Remove Cover Page** – If you do not want to include a cover page in transcripts created using the selected profile. Use this option when creating PDF/A transcripts.

   - **Show Edit Cover Page screen**

     To preview/edit the cover page when creating PDF transcripts, click to select Yes .

   - **Append Errata Sheet**

     Not allowed for PDF/A formats

     If you want to add an errata sheet to the end of transcripts created using the selected profile, click . In the **Select an Errata Sheet** panel, any default errata sheet templates appear in the **Form** pane. Click a hyperlinked errata sheet template to select it. Errata sheet templates are created and stored in Form Templates.

   - **Use Header and Footer same as PDF Transcript on Errata Sheet**

     Slide to Yes to add the header & footer specified in the **Header & Footer** pane to errata sheets.

   - **Show Edit Errata Sheet screen**

     To preview/edit the errata sheet when creating PDF transcripts, slide to Yes.

3. Scroll or jump to the **Digital Signature** pane (see Setting RB-PDF Transcript digital signature preferences) or another pane to update.

TIP: Create customized cover pages and errata sheets

Use RB9's Form Templates to create your own company-branded cover pages and custom errata sheets. You can include your own content, formatting, company logo and merge data fields including various job date formats. See Creating/updating forms & letters.

Reference

- RB-PDF Transcripts
- PDF/A
- Form Templates

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Creating PDF transcripts
- Setting general PDF preferences
- Setting RB-PDF Transcript header & footer preferences
- Setting word index & word list preferences
- Setting condensed transcript preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences
- Setting RB-PDF Transcript word exclusion preferences
- Creating/updating forms & letters

Setting RB-PDF Transcript digital signature preferences

RB9 Standard only

Set overall preferences for digital signature options for transcripts created using a particular PDF Transcript profile. (Digital signatures are not allowed for PDF/A formats.)

Continued from Setting global RB-PDF Transcript preferences or Creating PDF transcripts.

1. Scroll or jump to the **Digital Signature** pane in the Edit PDF Transcript Preference window/Select PDF Transcript Preference window.
2. Specify the following:
   - **Add bookmark 'Validate Signer'**

     Not allowed for PDF/A formats

     Slide to Yes if you want to include a bookmark labeled, "Validate Signer," so that the reader of the PDF transcript can validate the signer's digital signature identity. (This is not common.)
3. Scroll or jump to the **Exclude Word** pane (see Setting RB-PDF Transcript word exclusion preferences) or another pane to update. ***(Exclude Word** pane appears only in global PDF Transcript Preferences, not in individual RB-PDF Transcript's Select PDF Transcript Preferences.)*

Reference

- RB-PDF Transcripts
- RB Digital Signature Proxy
- PDF/A

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Creating PDF transcripts
- Setting general PDF preferences
- Setting RB-PDF Transcript header & footer preferences
- Setting word index & word list preferences
- Setting condensed transcript preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript word exclusion preferences

Setting RB-PDF Transcript word exclusion preferences

RB9 Standard only

Create a list of words that are excluded from the word index and word list of transcripts created using a particular PDF Transcript profile.

Continued from Setting global RB-PDF Transcript preferences.

1. In the Edit PDF Transcript Preference window, scroll or jump to the **Exclude Word** pane. The list displays the currently excluded words for this profile.
2. Update defaults and make selections:
   - **To add a word** to the list, click . In the **Add Exclude Word** panel, enter the word in the **Exclude Word** field, then click **Save >**
     - **Save & New:** To save the word and add more words.
     - **Save & Close:** When you have no more words to exclude.
   - **To delete a word** from the list, check its box in the list, then click . Click **Yes** in the popup that appears.
3. Click **Save.**

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Setting general PDF preferences
- Setting RB-PDF Transcript header & footer preferences
- Setting word index & word list preferences
- Setting condensed transcript preferences
- Setting RB-PDF Transcript file preferences
- Setting cover page & errata sheet preferences
- Setting RB-PDF Transcript digital signature preferences

ASCII

American Standard Code for Information Interchange, or **ASCII,** is a common format for text files. In an ASCII file, every alphabetic, numeric, or special character is represented by a 7-digit combination of 0s and 1s.

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Creating PDF transcripts

Amicus

Amicus is an ASCII file format that follows its own set of rules, such as starting each page with its page number. Amicus does not maintain the original look of the transcript, but does maintain page and line numbers. (ASCII files in Amicus format are preferred by Summation users.)

Reference

- RB-PDF Transcripts
- ASCII

Step-by-step instructions

- Setting global RB-PDF Transcript preferences

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. PDFs can include encryption, digital signatures, and file attachments. RB9 uses the PDF format for RB-PDF Transcripts and for printing envelopes.

Reference

- RB-PDF Transcripts
- ReporterBase Digital Signature Proxy
- PDF/A

Step-by-step instructions

- Setting general PDF preferences
- Creating PDF transcripts
- Printing envelopes

PDF/A

PDF/A file formats are specialized versions of PDF designed for archiving/preserving electronic documents. PDF/A formats 1a & 2a differ from PDF by prohibiting features unsuitable for long-term archiving, including attachments and digital signatures. The more recent PDFA/3a format does not prohibit attachments, but it still does not allow digital signatures.

Reference

- RB-PDF Transcripts
- PDF
- ReporterBase Digital Signature Proxy

Step-by-step instructions

- Setting global RB-PDF Transcript preferences
- Creating PDF transcripts

Creating transcript stamps

RB9 Standard only

Make stamp templates that can be applied to RB-PDF Transcripts so you don't have to switch to a different program to stamp a transcript "original" or "certified copy."

1. **Setup > PDF Transcript Stamps**
2. In the PDF Transcript Stamps window, click **New.**
3. In the New PDF Transcript Stamp window:
   - ***Stamp Name**

     Required. Enter a descriptive label for the stamp.
   - **Box Width (inch)**

     Default is 2". Overwrite if desired.
   - **Box Height (inch)**

     Default is .5". Overwrite if desired.
   - **Box Border Thickness**

     Default is 5 pixels. Choose a different thickness in the drop-down.
   - **Box Border Color**

     Default is black. To change the border color, click . See Picking colors in RB9.
   - **Box Background Color**

     Default is white. To change the background color, click . See Picking colors in RB9.
   - ***Stamp Text**

     Required. Enter the text you want to appear on the stamp. To style the text, see Customizing emails, messages, web pages & stamps.
4. Click **Preview** to see how your stamp will appear on transcripts.
5. Click **Save >**
   - **Save & New** – To save the stamp and start another one without exiting the window.
   - **Save & Close** – When you are finished with creating stamps.

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Picking colors in RB9
- Customizing emails, messages, web pages & stamps
- Updating transcript stamps

Updating transcript stamps

RB9 Standard only

You can change any aspect of a transcript stamp, and your changes will apply to all future uses of the stamp. Delete any stamps you no longer need.

1. **Setup > PDF Transcript Stamps**
2. In the PDF Transcript Stamps window:
   - Click to view all of your stamps.
   - To narrrow the results, enter part of a stamp name in **Stamp Name** before clicking .
3. RB9 displays the results of your search. To:
   - **View the stamp,** click **> View.** Or click the hyperlinked name of the stamp.
   - **Update the stamp,** click **> Edit.** Or click **Edit** in the View PDF Transcript window.
   - **Delete the stamp,** click **> Delete.** Or click **Delete** in the View PDF Transcript window. In the popup that appears, click **Yes.**
4. If you clicked **Edit,** you can update any field:
   - ***Stamp Name**

     Required. Edit the stamp's label.
   - **Box Width (inch)**

     Stamp's width in inches. Overwrite default if desired.
   - **Box Height (inch)**

     Stamp's heigth in inches. Overwrite default if desired.
   - **Box Border Thickness**

     Choose a different thickness in the drop-down.
   - **Box Border Color**

     To change the stamp's border color, click . See Picking colors in RB9.
   - **Box Background Color**

     To change the stamp's background color, click . See Picking colors in RB9.

*Stamp Text

Required. Edit the text that appears on the stamp. To style the text, see Customizing emails, messages, web pages & stamps.

5. Click **Preview** to review your changes before saving.
6. Click **Save.**

Reference

- RB-PDF Transcripts

Step-by-step instructions

- Picking colors in RB9
- Customizing emails, messages, web pages & stamps

Setting up alias patterns

RB9 Standard only

RB9 can automatically add hyperlinks in PDF transcripts to related exhibits, so your clients can view exhibits in context by clicking the links in the transcript. These links are called *aliases,* and can be either words or phrases used in transcripts to reference the exhibits.

If your exhibit file names and exhibit references in transcripts follow a pattern, for example files and references are numbered consecutively (file names like EX01, EX02, and transcript references like Exhibit 1, Exhibit 2), save production time by setting up those patterns before producing hyperlinked transcripts.

1. **Setup > Link Exhibits Patterns**
2. Any existing patterns appear in the Link Exhibits Patterns window. Click **New.**
3. In the New Link Exhibits Patterns window:
   - ***File Name Pattern**
     Required. Enter the in-common part of exhibit file names, such as EX or EX0, in the field. If exhibits are numbered consecutively, add a "?" (question mark) in the file name pattern indicating where the number appears.
   - ***Alias Pattern**
     Required. Enter the in-common part of the names used in transcripts to refer to exhibits, such as exhibit or Exhibit. If exhibits are numbered consecutively, add a "?" (question mark) in the alias pattern indicating where the number appears.
4. Click **Save >**
   - **Save & New:** To save the pattern and add more.
   - **Save & Close:** When you have no more patterns to add.

NOTE: Creating patterns on the fly

In addition to setting up these default patterns, you can create patterns for individual transcripts that have their own exhibit references that do not fit your general patterns. When linking exhibits to a PDF transcript, if any file names do not fit your patterns, you can create custom patterns for that transcript. Patterns set up in individual transcripts are not saved in your Link Exhibits Patterns database.

TIP: Managing exhibit linking patterns

- **To view an existing pattern:** Click the pattern's **> View** or hyperlinked **File Name Pattern** in the Link Exhibits Patterns window.
- **To edit an existing pattern:** Click the pattern's **> Edit** in the Link Exhibits Patterns window. Or click **Edit** in the Link Exhibits Patterns. Edit the pattern following the instructions above.

- **To delete an existing pattern:** Click the pattern's **> Delete** in the Link Exhibits Patterns window. Or click **Delete** in the View Link Exhibits Patterns window. Click **Yes** in the popup window that appears.

Reference

- RB-PDF Transcripts
- Link Exhibits

Step-by-step instructions

- Linking exhibits

Creating exhibit stamps

RB9 Standard only

Make customized stamp templates that can be automatically applied to PDF exhibits in RB9.

1. **Setup > Exhibit Stamps**
2. In the Exhibit Stamps window, click **New.**
3. In the New Exhibit Stamp window:

- ***Stamp Name**

  Required. Enter a descriptive label for the stamp.

- **Box Width (inch)**

  Default is 2". Overwrite if desired.

- **Box Height (inch)**

  Default is .5". Overwrite if desired.

- **Box Border Thickness**

  Default is 5 pixels. Choose a different thickness in the drop-down.

- **Box Border Color**

  Default is black. To change the border color, click . See Picking colors in RB9.

- **Box Background Color**

  Default is white. To change the background color, click . See Picking colors in RB9.

- **Digits of Exhibit No.**

  Default is 4 digits. Select a different number length in the drop-down if desired.

- **Leading Character of Exhibit No.**
  - **0** – Default. Exhibit numbers will start with a zero (0).
  - **(no space)** – Exhibit numbers will not have a space preceding the number.
  - **(space)** – Exhibit numbers will start with a space.

- **Stamp Occurrence**

  To change how often the exhibit stamp appears in an exhibit, choose from the drop-down:

  - **On every page** – Exhibit stamp will appear on every page of multi-page exhibits.

- **On first page** – Default. Exhibit stamp will appear once on the exhibit.

- **Stamp Position**

  To change where the stamp will appear on an exhibit page, choose from the drop-down:

  - **Top Left**
  - **Top Right** – Default
  - **Bottom Left**
  - **Bottom Right**

- **Left/Right/Top/Bottom Margin (inch)**

  In inches. Works in conjunction with **Stamp Position.** For example, with Top Right Stamp Postion, you can overwrite the default **Right Margin** and **Top Margin** distances from the paper edge.

- ***Stamp Text**

  Required. Enter the text you want to appear on the stamp. To style the text, see Customizing emails, messages, web pages & stamps.

- **Show to Resource**

  Default is Yes. If you allow resources to turn in jobs via RB Connect, leave this as Yes if you want to allow resources to use this stamp on exhibits they turn in online. If you do not want resources to have access to this stamp, slide to No.

4. Click **Preview** to see how your stamp will appear on exhibits.
5. Click **Save >**
   - **Save & New** – To save the stamp and start another one without exiting the window.
   - **Save & Close** – When you are finished with creating stamps.

TIP: Have reporters apply stamps when uploading files
Your production staff can apply stamps automatically when uploading PDF exhibit files to the Witness repository in Turn In (see Adding stamps to exhibits). If you have reporters turn in online through RB Connect, give them the ability to do the same (see Resource – Turn In preferences).

Reference

- PDF
- RB Connect
- Resource – Turn In preferences

Step-by-step instructions

- Adding stamps to exhibits
- Picking colors in RB9
- Customizing emails, messages, web pages & stamps
- Updating exhibit stamps

Updating exhibit stamps

RB9 Standard only

You can change any aspect of a exhibit stamp, and your changes will apply to all future uses of the stamp. Delete any stamps you no longer need.

1. **Setup > Exhibit Stamps**
2. In the Exhibit Stamps window:
   - Click to see all stamp templates in your database
   - Enter a stamp name/partial name in **Stamp Name** before clicking .
3. RB9 displays the results of your search. To:
   - **View the stamp,** click **> View.** Or click the hyperlinked name of the stamp.
   - **Update the stamp,** click **> Edit.** Or click **Edit** in the View Exhibit Stamp window.
   - **Delete the stamp,** click **> Delete.** Or click **Delete** in the View Exhibit Stamp window. In the popup that appears, click **Yes.**
4. If you clicked **Edit,** you can update any field:
   - ***Stamp Name**

     Required. Edit the stamp's label.
   - **Box Width (inch)**

     Stamp's width in inches. Overwrite default if desired.
   - **Box Height (inch)**

     Stamp's heigth in inches. Overwrite default if desired.
   - **Box Border Thickness**

     Choose a different thickness in the drop-down.
   - **Box Border Color**

     To change the stamp's border color, click . See Picking colors in RB9.
   - **Box Background Color**

     To change the stamp's background color, click . See Picking colors in RB9.
   - **Digits of Exhibit No.**

     Select a different number length in the drop-down if desired.

- **Leading Character of Exhibit No.**
  - **0** – Exhibit numbers will start with a zero (0).
  - **(no space)** – Exhibit numbers will not have a space preceding the number.
  - **(space)** – Exhibit numbers will start with a space.
- **Stamp Occurrence**

  To change how often the exhibit stamp appears in an exhibit, choose from the drop-down:
  - **On every page** – Exhibit stamp will appear on every page of multi-page exhibits.
  - **On first page** – Exhibit stamp will appear once on the exhibit.
- **Stamp Position**

  To change where the stamp will appear on an exhibit page, choose from the drop-down.
- **Left/Right/Top/Bottom Margin (inch)**

  In inches. Works in conjunction with **Stamp Position.** For example, with Top Right Stamp Postion, you can overwrite the default **Right Margin** and **Top Margin** distances from the paper edge.
- ***Stamp Text**

  Required. Edit the text that appears on the stamp. To style the text, see Customizing emails, messages, web pages & stamps.
- **Show to Resource**

  If you allow resources to turn in jobs via RB Connect, slide to Yes if you want to allow resources to use this stamp on exhibits they turn in online. If you do not want resources to have access to this stamp, slide to No.

5. Click **Preview** to review your changes before saving.
6. Click **Save.**

Reference

- PDF
- RB Connect

Step-by-step instructions

- Picking colors in RB9
- Customizing emails, messages, web pages & stamps
- Creating exhibit stamps

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 RB9 system-wide preferences and defaults.

- **Connect > Connect Preferences**

  For setting RB Connect preferences and defaults.

2. Customize preferences

Click the desired function, then click **Edit** at the top of its panel. To set:

- **RB9 system preferences**
  - **System-wide** preferences and defaults, see General preferences.
  - **Calendar module** preferences and defaults, see Calendar 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.
  - **Tools module** preferences and defaults, see Tools preferences.
  - **Entities module** preferences and defaults, see Entities preferences.
- **RB Connect Preferences**

  Preferences and defaults for RB Connect functions.

3. Save preferences

Click **Save** at top of function's panel. Then click **Close** at top of function's panel.

Reference

- RB Connect
- General preferences

- Calendar preferences
- Production preferences
- Billing preferences
- Receivables preferences
- Payables preferences
- Entities preferences
- Tools preferences
- Connect preferences

Customizing communications

Depending on the function you are sending communications from, you can create and customize templates for its email and SMS text messages, then select which template is the default for each communication type.

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. Depending on how the function communicates, its preferences panel displays template lists for emails, SMS text messages, and/or iCalendar events. 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 & stamps.

- **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. Then click **Save.**

NOTE: Customize attached/included forms also

Some RB9 emails (Assignment Notification, Assignment Cancellation, Job Confirmation, and Job Cancellation) include forms that contain related information. You can customize the content of these forms, even add new forms, in Form Templates.

3. Set SMS preferences

In the **SMS** pane, the default text message template and any other templates you previously created are listed. To:

- **Create a new template** – Click . In the **New SMS Template** panel, all fields are required. Enter a name in ***Template Name.** To enter the subject line and message including data fields and message formatting, see Customizing emails, messages, web pages & stamps.
- **Update an existing template** – Click the hyperlinked **Template Name.** In the **Edit SMS Template** panel, change the ***Template Name** if desired. To edit the template's ***SMS Subject** line or ***SMS Message,** see Customizing emails, messages, web pages & stamps.
- **Delete a template** – Click its hyperlinked **Template Name.** In the **Edit SMS 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 SMS Template** panel, slide **Default** to Yes. Then click **Save.**

IMPORTANT: Keep your text messages brief & to the point

When crafting SMS messages in RB9, keep in mind that different carriers have different character limits for text messages (some as short as 67 characters for Subject and Message combined). 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. SMS is just an instant notice for additional email notification, which would be more detailed.

Additional points to keep in mind:

- Merge fields could expand your message to beyond the cutoff range, so try to plan for that. For example, what you see in the set up as «Case_Name» could expand to 80 characters in an actual SMS message.
- Subject lines are usually limited to 40 characters, so do not use data fields in the Subject line except JobNo or JobDate.
- Do not put URLs in the Subject line. They should go in the body of the message.
- If a URL is long, consider using one of the URL shortener services, such as TinyURL, to minimize the characters in a URL link.

4. Set iCalendar preferences

1. In the **iCalendar** pane, slide **Attach iCalendar** to Yes to include an iCalendar event.
2. To enter the subject line and message including data fields and message formatting, see Customizing emails, messages, web pages & stamps.

5. Save preferences

After setting preferences, click **Save.**

Reference

- Assignment Cancellation preferences
- Assignment Notification preferences
- Future Calendar preferences
- Job Cancellation preferences
- Job Confirmation preferences
- Overdue Tasks Report preferences
- Resource Blast preferences
- Invoice preferences
- Statement preferences
- Pay Statement preferences
- Connect Invitation Letter preferences
- Transcript Packages preferences
- Repository preferences
- Form Templates

Step-by-step instructions

- Customizing emails, messages, web pages & stamps
- Creating/updating forms & letters

Customizing emails, messages, web pages, & stamps

Customize the appearance of the body and signature of emails and RB Connect web pages with text formatting, images, hyperlinks, and tables. Customize the look of invoice messages and stamps you apply to RB-PDF Transcripts and exhibits.

You can also edit default text, add personalized text, and insert relevant RB9 data with contextual data fields in emails, invoice messages, and RB Connect pages.

You can override these defaults in any emails sent from RB9.

Continued from Composing emails & text messages, Creating transcript stamps, Updating transcript stamps, Creating exhibit stamps, Updating exhibit stamps, Customizing communications, Customizing email preferences, Setting personal preferences, Alerting clients, Payment Receipts 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, and Sending urgent requests for help.

- ## Customize subject lines

1. Click in an ***Email Subject** or ***SMS 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.

   If **Attach iCalendar** is checked, customize the default iCalendar Subject/iCalendar Description for the function's iCalendar event:

   - **Enter/edit text** in the field.
   - **Insert data fields** – 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 iCalendar entry's purpose are listed.

   Data fields are not available in Forgot Password emails, Resource Blast emails or text messages.

- ## Customize text appearance

  In an ***Email Message/*Message** pane, **Signature** pane, the **Login Page Description for Contact/Resource** 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/Resource–Announcements** panel, you can either:

- Set these options then enter 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.

  - **Align Text Left**

    Not in Invoice Messages

    Have selected text line up on left margin only.

  - **Center Text**

    Not in Invoice Messages

    Have selected text align to a midpoint.

  - **Align Text Right**

    Not in Invoice Messages

    Have selected text line up on right margin only.

  - **Justify Text**

    Not in Invoice Messages

    Have selected text line up on both left and right margins.

  - **Insert Unordered List**

    Not in Invoice Messages, PDF Transcript Stamps or Exhibit Stamps

    Mark each paragraph of selected text with a bullet.

  - **Insert Ordered List**

    Not in Invoice Messages, PDF Transcript Stamps or Exhibit Stamps

    Number each paragraph of selected text.

  - **Indent**

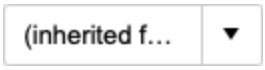
    Not in PDF Transcript Stamps or Exhibit Stamps

    Move the selected text in from the margin in increments.

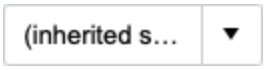
  - **Outdent**

Not in Invoice Messages, PDF Transcript Stamps or Exhibit Stamps

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**

  Not in PDF Transcript Stamps or Exhibit Stamps

  Select background color in the drop-down 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 and the entire word will be bolded. Click within a paragraph, then click and the entire paragraph will be indented.

- ## Insert content

  Not in PDF Transcript Stamps

  In ***Email Message** pane, the **Login Page Description for Contact/Resource** pane, or the ***Stamp Text** pane, 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**

  Not in Invoice Messages

  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. RB9 will create a 100%-width table with the selected parameters.
  - Click **Table Wizard** to enter table parameters in the Table Wizard popup.

- **Insert Image**

  Not in Invoice Messages

  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 RB9 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 Invoice Messages, PDF Transcript Stamps, Exhibit Stamps, Notifications and Messages, 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.

- **Save customization**
  After update the appearance and/or content, click **Save.**

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. RB9 does not save your adjustments after closing the window.

NOTE: Email formatting vs. template formatting

If an email includes an RB9 form, such as for job confirmations, 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

- General – Forgot Password Email preferences
- RB Connect
- RB-PDF Transcripts
- Email preferences
- Payment Receipts preferences
- Branding preferences (RB Connect)
- Contact – Announcement preferences
- Contact – Calendar preferences
- Contact – Account Activity preferences
- Contact – Support Tickets preferences
- Resource – Announcement preferences
- Resource – Support Tickets preferences
- PDF Transcript Stamps
- Exhibit Stamps
- Report Issues
- Suggest Ideas
- Notifications and Messages
- Resource Blast
- HTML

- Form Templates

Step-by-step instructions

- Composing emails & text messages
- Setting up invoice messages
- Creating transcript stamps
- Updating transcript stamps
- Creating exhibit stamps
- Updating exhibit stamps
- Customizing communications
- Customizing email preferences
- Alerting clients
- 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
- Sending urgent requests for help
- Customizing email preferences
- Working with HTML
- Creating/updating forms & letters
- Emailing & texting from RB9

Testing email settings

Check that you have the correct settings for sending emails from within RB9.

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 RB9 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, RB9 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-RB9 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

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 & stamps

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 RB9 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 & stamps

Adding your offices to RB Network

Let other agencies and related businesses that use RB9 find you and contact you directly from within RB9. Add all of your offices that you would want people to contact through RB9. You can update these listings anytime.

Continued from RB Network preferences.

1. In the **New Office/Edit Office** panel enter required information:

   - ***Office Name**

     Required. Enter a name for the office.

   - ***Address**

     Required. Enter the office's mailing address — street & suite number OR P.O. box number.

   - ***City**

     Required. Enter the mailing address city.

   - ***State**

     Required. Click ▾ then select the mailing address state.

     TIP: Save time by entering the zip code first

     If you enter the office's zip code in **Zip** first and click the field's ▫, RB9 will automatically populate the **City** and **State** fields, eliminating the need to key in that information yourself.

   - ***Contact**

     Required. Enter the name of the person you want to be your point person for RB Network contacts.

   - ***Email**

     Required. Enter the email address you want RB Network members to use when contacting you.

2. Enter other information if desired. You can also add this later at any time after saving this office.

   - **Zip**

     Enter the mailing address postal code. While it is not required for a listing, having a zip code with the address is required for viewing the location on a map and getting driving directions in RB Network.

- **Office Type**

  Default is Headquarter. Click ▾ then select Branch Office if this is an additional office.

- **Phone No.**

  Enter the number you want RB Network members to use when contacting you.

- **Fax**

  Enter the fax number you want RB Network members to use when contacting you.

- **Web URL**

  Enter your company's URL.

- **Coverage Area**

  Enter text to describe the region or regions the office can cover for other RB Network members.

3. If this is a new listing, click **Save >**

   - **Save & New –** To add another office without leaving the **New Office** panel.
   - **Save & Close –** If you don't have more information to include about the office or additional offices to add.

   If this is an existing listing, click **Save.**

Reference

- RB Network

Step-by-step instructions

- Customizing global preferences
- Finding network members

General preferences

System-wide basic preferences and defaults.

- **Email**

  Options and content for general emails to clients, resources, locations and other users.

- **Forgot Password Email**

  Options for emails sent to RB9 users when they request a new password.

- **License Info**

  Information about your version of RB9, invoices, and credit card, plus options for your system.

- **Login**

  Options for user log-ins to RB9 follow general security rules for business applications. (Login preferences are slightly different for RB Connect. See Connect Login preferences.)

- **Notifications and Messages**

  Preferences for your company's message center.

- **Session Timeout**

  Length of time of no activity before RB9 automatically logs off.

- **SMS**

  Information needed for using a text messaging service from within RB9.

- **System Time**

  Defaults for your RB9 job clock.

Reference

- Connect Login preferences

Step-by-step instructions

- Customizing global preferences

Email preferences

Options and content for general emails to clients, resources, 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 RB9 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

Options for emails sent to RB9 users when they request a new password.

Continued from Customizing global preferences.

To customize ***Email Subject** and ***Email Message** *(both required)* for emails sent to RB9 users when they request a new password, see Customizing emails, messages, web pages & stamps.

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages, web pages & stamps
- Setting your password at log-in
- Resetting passwords

License Info preferences

Find information about your version of RB9. Change the number of named user licenses in your RB9, request system upgrades/downgrades, view billing history, pay invoices, and update the credit card that makes your monthly payments for RB9.

- **Product Code**

  Your RB9 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 RB9 licenses will expire if not renewed

- **Edition**

  Edition of ReporterBase 9 software you are using (Standard or Lite). To change editions, see Changing your RB9 edition.

- **Licensed URL**

  Web address of your RB9

- **Licensed To**

  Entity your RB9 is licensed to

- **Repository Usage (GB)**

  Amount in gigabytes of storage you are currently using for your RB9 repository

- **Repository Files**

  Number of files in your RB9 repository

- **Plug Ins**

  Any plug-ins you currently subscribe to are checked in the **Active** column of this pane

- **Custom Functions**

  Any RB9 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 RB9 subscription, see Paying for RB9.

Reference

- Named User Licenses

Step-by-step instructions

- Customizing global preferences
- Adding or subtracting user licenses
- Changing your RB9 edition
- Paying for RB9

Named User License

RB9 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 RB9 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:** RB9 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:** RB9 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

Step-by-step instructions

- Customizing global preferences
- Updating credit cards

Updating credit cards

If you want to change the credit card used for your RB9 account, your card has expired, or you want to update its billing information, update the card in System Preferences.

Continued from Paying for RB9 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

- Paying for RB9
- Adding or subtracting user licenses
- Customizing global preferences

RB9 Lite

The Lite edition of RB9 includes essential scheduling and billing functions, along with basic receivables, payables, and client management functions. While there are fewer functions in RB9 Lite, they work the same as in the standard edition of RB9. You can upgrade to RB9 Standard or downgrade to RB9 Lite anytime.

Reference

- Comparison chart

Step-by-step instructions

- Changing your RB9 edition

Changing your RB9 edition

You can upgrade from RB9 Lite to the standard version of RB9 and vice versa.

Continued from License Info preferences.

1. In the **General – License Info** panel, click **Edition >**
   - **Compare ReporterBase 9 Editions:** To view the chart of which RB9 functions are included in each edition. See Comparison Chart.
   - **Request a downgrade to Lite Edition:** *Administrators only.* To send a request to OMTI to change your edition of RB9 Standard to RB9 Lite.
   - **Request an upgrade to Standard Edition:** *Administrators only.* To send a request to OMTI to change your edition of RB9 Lite to RB9 Standard.
2. In the **Request a downgrade to Lite Edition/Request an upgrade to Standard Edition** panel, the soonest date you can change your edition appears in ***Date you want to downgrade/*Date you want to upgrade.** Click to change the date to a different one in the future, if desired. See Date Navigator.
3. Enter any messages you want to include with your request in **Additional Messages.**
4. Click **Request.** Your Edition Change request will be sent to OMTI.

Reference

- RB9 Lite
- Comparison Chart
- Date Navigator

Step-by-step instructions

- Customizing global preferences

Comparison chart

Functions included in RB9 Lite and RB9 Standard.

O = included X = not included

RB9 Module	Function	Lite	Standard
Personal	Log In	O	O
	Notifications and Messages	O	O
	Change Password	O	O
	Locked Data	O	O
	User Preferences	O	O
	Close All Tabs	O	O
	Log Out	O	O
Calendar	Cases	O	O
	Jobs (List View)	O	O
	Jobs (Monthly View)	O	O
	Jobs (Weekly View)	X	O
	Send Job Confirmations/Cancellations	O	O
	Tasks (List View)	O	O
	Tasks (Monthly View)	O	O
	Resource Availability	O	O
	Quick Assignments	X	O
	Resource Blast	X	O
	Send Assignment Notifications/Cancellations	O	O
	Daily Calendar Audit	O	O

	Send Future Calendar	X	O
	Job Printout	O	O
	Job Analysis	X	O
	Tasks in Progress	O	O
	Send Overdue Tasks Report	O	O
	Assignment Analysis	X	O
Production	Turn In	O	O
	Tracking	X	O
	Production Sheets	O	O
	Envelopes and Labels	X	O
	Shipping	X	O
	Letters	X	O
	Send Originals Out	X	O
	Repository	O	O
	PDF Transcripts	X	O
	Create Master Word List	X	O
	Link Exhibits	X	O
Billing	Post Invoices	O	O
	COD Invoices	O	O
	Send Invoices	O	O
	Transfer Invoices	O	O
	Export Invoices	X	O
Inquiry	Invoice Inquiry	O	O
	Client Activity	O	O

	Client Analysis	X	O
	Resource Activity	O	O
	Resource Analysis	X	O
	Witness Inquiry	O	O
	Receivable Transaction Inquiry	O	O
	Override Resource Pay Inquiry	O	O
	Anniversary Inquiry	X	O
	Marketing Inquiry	X	O
Receivables	Receive Payments	O	O
	Enter Other Transactions	O	O
	Send Payment Receipts	O	O
	Resource Billings Report	X	O
	Daily Register	O	O
	Daily Balance Log	X	O
	Finance Charges	O	O
	Monthly Journals	O	O
	Aged A/R	O	O
	Send Statements	O	O
	Client Account Activity	X	O
	Paid Invoices	X	O
	Voided Invoices	X	O
	Collection Letters	X	O
	Collection Follow-up	X	O

	Collection Forecast	X	O
Payables	Override Resource Pay	O	O
	Pay Adjustments	O	O
	Pay Resources	O	O
	Send Resource Pay Statements	O	O
	Print Checks	X	O
	1099 Pay Detail	X	O
	Print 1099 Forms	X	O
	Sales Commission Report	X	O
	Override Sales Commission	X	O
	Additional Resource Production Report	X	O
	Total Payable Report	O	O
	Sales Tax	X	O
	Liability Balance Log	X	O
	Reward Points Summary	X	O
	Reward Points History	X	O
	Reward Points Analysis	X	O
Reports	Business Analysis	X	O
	Gross Profit	X	O
	Misc. Sales	X	O
	Client Rating Report	X	O
	Insurance Billing	X	O
	Resource Production	X	O
	Original Page Production	X	O

	Task Turnaround Analysis	X	O
	Daily Tracking Summary	X	O
	Tracking Productivity Analysis	X	O
Tools	Bulk Import	O	O
	Bulk Update	O	O
	Tag Manager	X	O
	Form Templates	O	O
	Label Templates	X	O
	Notes Templates	X	O
	Notes Finder	X	O
	Repository Download Log	X	O
	Download Backup File	X	O
	Email Log	X	O
	Merge History	O	O
	Query Maker	X	O
	QuickBooks Integrator	X	O
	Send Invitations for Signature Proxy	X	O
	Signature Proxy Usage	X	O
	RB Network	O	O
Entities	Firms	O	O
	Contacts	O	O
	Resources	O	O
	Locations	O	O
	Business Units	O	O

Setup	Lists	O	O
	Users and Groups	O	O
	Chart of Accounts	O	O
	Service Item Subgroups	O	O
	Service Item Master	O	O
	Rush Type Master	O	O
	Billing Rates	O	O
	Pay Rates	O	O
	Billing Sets	O	O
	Pay Dates	O	O
	Invoice Headers	O	O
	Invoice Messages	O	O
	States	O	O
	Tracking Steps	X	O
	PDF Transcript Preferences	X	O
	PDF Transcript Stamps	X	O
	Link Exhibits Patterns	X	O
	Exhibit Stamps	X	O
	System Preferences	O	O
Connect	Send Invitations	X	O
	Transcript Ordered	X	O
	Publish COD Invoices	X	O
	Fulfill Points Redemption Orders	X	O

	Transcript Packages	X	O
	Create Full-Text Search	X	O
	Approve Time-off	X	O
	Billing Sheets	X	O
	Activity Log	X	O
	Support Tickets	X	O
	Connect Preferences	X	O
Help	User Guide	O	O
	Online Training	O	O
	Update History	O	O
	FAQ/KnowledgeBase	O	O
	Online Support: Team Viewer	O	O
	Live Chat	O	O
	Report Issues	O	O
	Suggest Ideas	O	O
	About	O	O
Pricing		**Server $150 1 CAL $40**	**Server $250 1 CAL $ 60**

Paying for RB9

View your billing history, pay invoices, and update or change the credit card that automatically pays your RB9 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 RB9 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.**

Step-by-step instructions

- Customizing global preferences
- Paying invoices
- Updating credit cards

Paying invoices

Pay your RB9 invoices within RB9.

Continued from Logging into RB9 or Paying for RB9.

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 RB9 invoices appears in the **Payment Method** pane. If you want to update or change the credit card, see Updating credit cards.
3. Click **Pay.** RB9 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 **Setup > System Preferences > General – License Info > Billing.** See Paying for RB9.

Step-by-step instructions

- Customizing global preferences
- Logging into RB9
- Paying for RB9
- Updating credit cards

Login preferences

Options for user log-ins to RB9 follow general security rules for business applications. (Login preferences are slightly different for RB 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 drop-down to allow a set amount of incorrect login attempts before RB9 locks out the user.

  You can unlock an account in the account's User window. See Unlocking user accounts.

  NOTE: Security requires lock-out

  RB9 system preferences offer a Never Locked Out option. Unless you are using RB9 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 RB9 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 RB9 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 RB9 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. Slide to Yes to allow users to sign into RB9 using their *Facebook, Google+, LinkedIn,* or *Microsoft* account.

- **Use Two-Factor Authentication**

  Click to select Yes to require users to verify their identity upon RB9 sign-in with a second factor in addition to their user name and password. (You can also set up two-factor authentication (2FA) for RB Connect users. See Connect Login preferences.)

  In RB9 & RB Connect, a verification code will be sent via the user's preferred method of communication, which they must then enter into RB9/RB 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
- Calendar preferences
- 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 drop-down for how long RB9 will keep this information in the system.

Reference

- Notifications and Messages

Step-by-step instructions

- Communicating within RB9
- Customizing global preferences

Session Timeout preferences

Session timeout occurs when a user does not perform any action in RB9 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 drop-down 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

SMS preferences

Set up a text messaging service account to use from within RB9.

Continued from Customizing global preferences.

1. All fields are required.

   - **Vendor**

     Select your third-party SMS (text message) vendor in the drop-down:

     - **SMS Email Gateway Service** – Legacy service being discontinued by many mobile carriers. Not recommended.
     - **Telnyx** – See Using Telnyx for text messaging in RB9 for instructions for getting your authentication keys for your Telnyx service.
     - **Twilio** – See Using Twilio for text messaging in RB9 for instructions for setting up your Twilio account and getting your authentication keys to use in RB9.

   - ***Account SID**
   - ***Auth Token**
   - ***My Number**

     Enter your cell phone number in numerals only, no spaces.

2. Click **Test SMS.**
3. In the **Test SMS** panel,

   - ***To Number**

     Required. Enter a phone number that can receive the test text message so you can check that it was sent.

   - ***Message**

     Required. Enter some text for the test message.

4. Click **Send.**
5. Check that the text message was received, then click **Save** in the **Test SMS** panel.

Reference

- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Using Telnyx for text messaging in RB9
- Using Twilio for text messaging in RB9

Using Telnyx for text messaging in RB9

To use the Telnyx service for sending text messages from RB9, you must set up a Telnyx account, generate credentials, buy a phone number from Telnyx to use for messages, and enter your credentials in RB9. You can also optionally set up your account to forward texts from Telnyx to your own cell phone.

1. Go to the Telnyx website: https://telnyx.com/sign-up
2. Enter your information in the **Create a Telnyx account** fields, check the box that says you agree to their terms, then click **Sign Up.**
3. Check your inbox for the verification email and click **Verify email address** in the email.
4. On the Welcome page, click **UPGRADE** in the upper right corner.
5. On the Account Levels Upgrade page, enter your company information in the **Add service address** section, then **Create Address.**
6. Enter your payment information in the **Add payment** section, then click **Make payment.**
7. Click **Next.**
8. Enter your phone number in the **Verify mobile number** section, then click **Send code.**
9. Enter the verification code you receive, then click **Verify Code.**
10. Click **Verify identity** in the **Verify your identity** section.
11. After completing the identity verification process, click **Upgrade** on the Account Levels screen that appears.
12. Click **Finished.**
13. Check that the top right corner says **PAID.**
14. Click **Buy numbers** in **Real-Time Communications > Numbers > Buy Numbers.**
15. On the Buy Numbers screen, select **SMS** and **MMS** under **Features,** enter other relevant information, then click **Search Numbers.**
16. In the list of available numbers at the bottom of the screen, click **Add to Cart** for the number you want to use.
17. Click the cart at the top right of the screen to purchase the number.

18. Copy and save the purchased number as it will be used in RB9.
19. In the Telnyx console, click **Real-Time Communications > Messaging > Programmable Messaging** on the left.
20. Click **Add New Profile** in the upper right corner.
21. On the Create Messaging Profile screen, enter "[your company name]-RB9" in **Profile Name,** select "API V2" for **API Version,** then click **Next.**
22. In the Allowed destinations section, select **North America,** then click **Create.**
23. In the **Inbound settings** section, leave the **Webhook URL** and **Webhook Failover URL in Inbound** fields blank and click **Next.**
24. In the **Outbound settings** section, check the **Enable MMS fallback** and **Enable MMS transcoding** options, then click **Next.**
25. Click the **Assign** icon for the number you purchased.
26. Click **Accept** on the **Cost Changes** popup.
27. Click **Next,** then click **Complete.**
28. On the Messaging Profiles screen, click the **Edit** icon in the right section of the RB9 profile you created.
29. On the Profile settings screen under the **Details** tab, copy and save the **Profile ID** to use in RB9.
30. Go to **Real-Time Communications > Messaging > Compliance > 10DLC Brands** on the left side of the Console. The information you enter after this must be 100% identical to the information on IRS form CP-575 (https://gusto.com/resources/articles/taxes/form-cp-575) for the US to complete the authentication.
31. Click **Create Brand.**
32. On the Create a brand screen, enter the required information in the **Business information** section. Leave the Webhook URL and Webhook Failover URL fields blank.
33. Click **Submit.** After submitting your brand, it can take up to 48 hours to get approval. You can proceed with the next steps after you get approval.
34. Once your brand is approved, click **Messaging > Compliance > 10DLC Campaigns** on the left side of the Console.
35. Click **Create Campaign** at the top right of the Campaigns screen.
36. On the Create a campaign screen under **Campaign use case,** select the brand you created in the previous step, select **Account Notification** in the **Use case** dropdown,

then click **Next.**

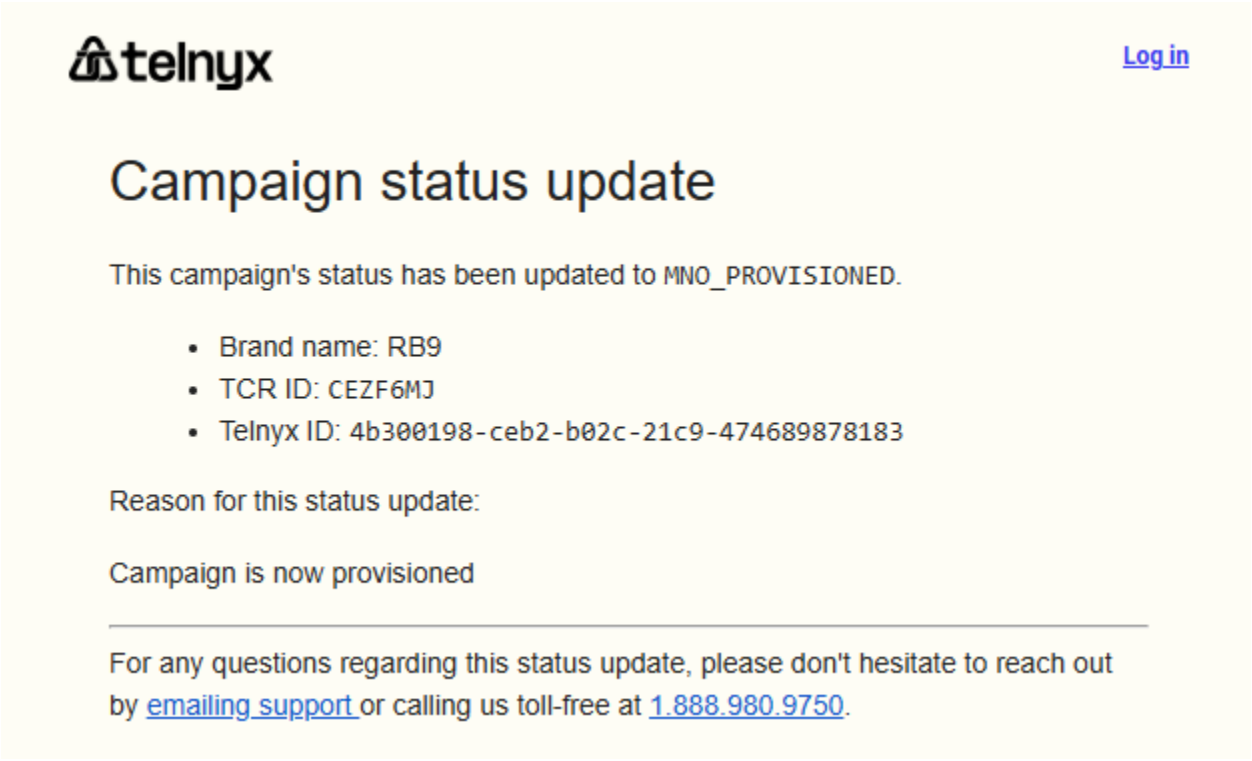
37. Click **Next** in the **Carrier terms preview** section.

38. In the **Campaign details** section, fill in the information below. Leave the **Webhook URL** and **Webhook Failover URL** fields blank.

Section	Field	Data
Content detail	Campaign Description	Job assignment notification, Job broadcasting to available workers
	Opt in Workflow Description (Message Flow/Call To Action)	When a potential worker comes to our office which is published at [your company URL], the representative explains the consent process verbally: The representative states to the potential worker: "By providing your phone number, you agree to receive SMS for the assigned job from [your company name]. The message contains information about the job and location directions. Reply STOP to opt out. Reply HELP for help. We will not share mobile information with third parties for promotional or marketing purposes." Once the potential worker verbally agrees, the phone number is recorded to the our system, and a confirmation SMS is sent: "You have agreed to receive SMS updates from [your company name]. The message contains information about the job and location directions. Reply STOP to opt out, HELP for help."
Keywords	Opt in keywords	START
	Opt out keywords	STOP
	Help keywords	HELP
Auto-responses	Opt in message	[Your company name]: You have agreed to receive SMS updates from [your company name]. The message contains information about the job and location directions. Reply STOP to opt out, HELP for help

	Opt out message	[Your company name]: You are unsubscribed and will receive no further messages.
	Help message	[Your company name]: Please reach out to us at [your company's email address and phone number] for help.
Sample messages	Message 1	Your job will be starting at 10:00am to 4:00pm at [job location]. Check email or web for more details.
Compliance links	Privacy policy	(leave blank)
	Terms and conditions	(leave blank)
	Embedded link	(leave blank)
Campaign and contents attributes	Embedded Link	No
	Embedded Phone Number	No
	Number pooling	No
	Age-Gated Content	No
	Direct Lending or Loan Arrangement	No
Webhooks	Webhook URL	(leave blank)
	Webhook Failover URL	(leave blank)

39. Click **Next.**
40. Click **Submit** on the Payment and confirmation screen.
41. Once the submitted campaign is verified, you can send a message.
42. When you receive an email like the following, log into the Telnyx console.



43. Go to **Real-Time Communications > Messaging > Compliance > 10DL Campaigns** and check if the **Status** is **Active.**
44. Click **'>'** on the right side of the **Campaign ID** listing.
45. On the Campaign Settings screen, click **Assign numbers.**
46. On the Assign numbers to your campaign screen, click **Numbers.**
47. Click the **Assign** button for the number you purchased, then click **Confirm** on the **Assigned number to campaign** popup to complete the number assignment.
48. If you want to forward the reply message of sent SMS messages to your actual cell phone, see Forwarding Telnyx text messages.
49. Click the **Personal icon > API keys** at the top right of the console.
50. Click **Create API Key** in the upper right corner of the API Keys screen.
51. In the **Create API Key** section, leave **Tags** empty and select **No Expiration** for **Expiration,** then click **Create.**

52. The API Key is used in RB9, so click **Copy to clipboard and close** and save it somewhere else.

53. To use Telnyx, enter the following information in **RB9 > Setup > System Preferences > General > SMS:**

Field	Data
API Key	Step #52
Profile ID	Step #29
My Number	Step #18
Mobile numbers to receive SMS replies	Step #48

54. To check incoming and outgoing messages, see Checking text messages sent via Telnyx.

Reference

- SMS Preferences

Step-by-step instructions

- Customizing global preferences
- Forwarding Telnyx text messages
- Checking text messages sent via Telnyx

Forwarding Telnyx text messages

If you are using the Telnyx service to send text messages from RB9, you can set up your Telnyx account to forward texts from Telnyx to your own cell phone.

Continued from Using Telnyx for text messaging in RB9.

1. On the left side of the Console, go to **Real-Time Communications > Programmable Messaging.**
2. Click **Edit** in the right section of the message profile you created.
3. In **Profile settings - Inbound,** enter the **Webhook URL** in the format below, then click **Save.**

Format	client-URL/Office/ForwardingTelnyxSMS
Example	https://rb9demo.reporterbase.com/Office/ForwardingTelnyxSMS

4. Enter the phone numbers to receive forwarded messages in **RB9 > Office > Setup > System Preferences > General > SMS > Mobile numbers to receive SMS replies.** If entering more than two phone numbers, separate them with commas.

Reference

- SMS Preferences

Step-by-step instructions

- Customizing global preferences
- Using Telnyx for text messaging in RB9

Checking text messages sent via Telnyx

If you are using the Telnyx service to send text messages from RB9, you can check incoming and outgoing messages sent through RB9.

1. Go to the Telnyx website: https://www.Telnyx.com/en-us
2. Log into your Telnyx account.
3. Click **Console > Reporting > Detailed Records.**
4. Enter the information below.

Field	Data
Report Type	Messaging
Start Date(UTC) - Required	Report start date & time
End Date(UTC) - Required	Report end date & time
Record Types	(leave blank)
Directions	blank/Inbound/Outbound
Filters	blank(no filter)/CLI (from number)/CLD (to number)/Tags/Billing Groups
Include Message Body	Check/Uncheck

5. Click **Generate Detailed Reports.**
6. You can download and view the generated report by clicking **Download Report.**

Step-by-step instructions

- Customizing global preferences
- Using Telnyx for text messaging in RB9

Using Twilio for text messaging in RB9

To use the Twilio service for sending text messages from RB9, you must set up a Twilio account, generate credentials, buy a phone number from Twilio to use for messages, and enter your credentials in RB9. You can also optionally set up your account to forward texts from Twilio to your own cell phone.

1. Go to the Twilio website: https://www.twilio.com/en-us
2. Click **Start for free.**
3. Enter your information in the **Sign up for free** fields, check the box that says you agree to their terms, then click **Continue.**
4. Check your inbox for the verification email. Enter the code from the email in the field on the website, then click **Verify.**
5. Enter your cell phone number, then click **Send code via SMS.**
6. Enter the verification code received via SMS on your phone, then click **Verify.**
7. Copy the **Recovery code** from the You're all verified screen. You can use it later if you lose your password, so save it somewhere else.
8. Click **Continue** to complete registration.
9. Click **Create New Account.**
10. In the Account details screen, enter "[your company name]-RB9" in **Account friendly name.**
11. Select **Twilio** in **What will this account be used for?**
12. Click **Continue.**
13. If the information in the Review screen is incorrect, revise it. Otherwise, click **Create new account.**
14. On the Select a plan to get started with Twilio screen, click **Continue with pay as you go.**
15. On the Upgrade your account screen, click **Get started.**
16. Click **Continue** on the Create your customer profile screen.
17. On the Just the basics screen, review the information and update it if needed. Check the **I am above 18 tears of age** box, then click **Continue.**
18. On the Identity type screen, select **Business use: For my company or organization**

to use Twilio's service.

19. Select **Direct customer: A company that communicates on behalf of our own products and services.** Then click **Continue.**
20. On the Business information screen, enter the relevant information and select options in the dropdowns, then click **Continue.**
21. On the Business address screen, change the selection for Country in the dropdown if needed, then click **Continue.**
22. Enter your business's street address, no P.O. boxes, check the consent box, then click **Submit.**
23. On the Thank you for providing your profile details screen, click **Continue to billing details**.
24. On the Main address screen, enter your business's primary address — P.O. boxes are OK — then click **Next.**
25. Review the information on the **Verify your address** popup. If correct, click **Use validated address.**
26. On the Starting balance screen, select the $ amount you want to start your service with, choose the autofill threshold and recharge amount, then click **Next.**
27. On the Payment details screen, enter your credit card or PayPal information, then click **Confirm $xx.xx payment.**
28. On the Your account was successfully upgraded screen, click **Great, start building.**
29. On the Get started with Twilio screen, your **Account SID** and **Auth Token** appear under **Account Info.** These are required to use Twilio in RB9 and are available at all times on the **Account Dashboard.**
30. Go to **Account Dashboard > Develop > Messaging > Regulatory Compliance > Brands** and click **Register a Brand.** In the US, for branding you must enter information that 100% matches the information on IRS form CP-575 (https://gusto.com/resources/articles/taxes/form-cp-575) to complete verification.
31. In the Submit Brand screen, select your **Company Type** and choose an option in **What type of brand do you need?**
32. Select **Yes** for **Enable brand sharing with current subaccounts** and check **I agree the above information is correct…**
33. Click **Register.**
34. Click **Continue** on the US A2P 10DLC Registration screen.

35. Click **Continue** on the A2P Messaging Limits screen.

36. On the Create new A2P Campaign screen, fill in the information below, then click **Create.**

Field	Data
Campaign description	This campaign is used to send assigned job details to workers or to broadcast a job to available workers.
Sample message #1	Your job will be starting at 10:00am to 4:00pm at [job location]. Check email or web for more details.
Sample message #2	I need a resource for a job starting at 9:00am at [job location]. First one to call us at [your company phone number] gets the assignment.
How do end-users consent to receive messages	When a potential worker comes to our office which is published at [your company website URL], the representative explains the consent process verbally: The representative states to the potential worker: "By providing your phone number, you agree to receive SMS for the assigned job from [your company name]. The message contains information about the job and location directions. Reply STOP to opt out. Reply HELP for help. We will not share mobile information with third parties for promotional or marketing purposes." Once the potential worker verbally agrees, the phone number is recorded to the our system, and a confirmation SMS is sent: "You have agreed to receive SMS updates from [your company name]. The message contains information about the job and location directions. Reply STOP to opt out, HELP for help."
Privacy Policy URL	Link must be publicly accessible (no login required). Must include: • What data you collect and how it's used • Confirmation that data won't be shared with third parties or used for marketing • Rather than updating your main company Privacy Policy, it is recommended to create a dedicated SMS-specific Privacy Policy page.

Terms and Conditions URL	Link must be publicly accessible (no login required). Must include: • Program name and description • Message/data rates and frequency • Support contact info • Opt-out instructions (HELP and STOP)

37. Click **Confirm** on the Confirm Campaign registration popup screen.
38. Back on the Create new A2P Campaign screen, click **Continue.**
39. On the Register phone numbers screen, click the **buy a new phone number here** hyperlink.
40. On the Buy a Number screen, search for the desired area code, then select one of the available phone numbers and click **Buy.**
41. On the Review Phone Number screen, check **I agree to comply with the Emergency calling terms and conditions** and click **Buy +1 xxx xxx xxxx.**
42. On the Number Purchased screen, click **Configure +1 xxx xxx xxxx.**
43. Click **Account Dashboard > Develop > Messaging > Regulatory Compliance > Campaigns,** then click **Register phone numbers.**
44. Check the box for the phone number you want to use and click **Register.**
45. After checking the contents of the Confirm Phone Number Association screen, click **Confirm.**
46. Verify that the selected phone number is registered in the **Connected Phone Numbers** section at the bottom of the screen.
47. You can find the **Account SID** and **Auth Token** in **Account Info** at the bottom of the Account Dashboard to use Twilio on RB9.
48. To use Twilio, enter the following information in **RB9 > Setup > System Preferences > General > SMS:**
49.

Field	Data
Account SID	Step #48

Auth Token	Step #48
My Number	Step #42

50. You can check incoming and outgoing messages by clicking **Account Dashboard > Monitor > Logs > Messaging** in your Twilio account.

51. If you want to forward the reply message of sent SMS messages to your actual cell phone, see Forwarding Twilio text messages.

Reference

- SMS Preferences

Step-by-step instructions

- Customizing global preferences
- Forwarding Twilio text messages

Forwarding Twilio text messages

If you are using the Twilio service to send text messages from RB9, you can set up your Twilio account to forward texts from Twilio to your own cell phone.

1. Go to the Twilio website: https://www.twilio.com/en-us
2. Log into your Twilio account.
3. Click **Account Dashboard > Develop > Studio > Flows,** then click **Create new Flow.**
4. Enter an identifier for this action (e.g., Forward Messages) in **Flow Name,** then click **Next.**
5. Under New Flow select **Start from scratch,** then click **Next.**
6. Click **Send Message** in the right menu, then drag the line from **Incoming Message** to the widget that appears.
7. Clicking on a widget allows you to add detailed settings. Enter a widget name and the desired message body. The received message can be passed through the {{trigger.message.Body}} variable, and the sent phone number can be passed through the {{trigger.message.From}} variable.
8. Click **Advanced configuration** to enter the message recipient and sender numbers. Once you're done, click **Save.**
9. Once you have completed creating your Flow, click **Publish** at the top.
10. After checking the popup, click **Publish.**
11. Click the phone number you want to use in **Account Dashboard > Develop > Phone Numbers > Active numbers.**
12. In the Messaging Configuration Section, set **A message comes in** to **Studio Flow,** select the **Flow** name created in the above process, then click **Save Configuration.**

Step-by-step instructions

- Customizing global preferences
- Using Twilio for text messaging in RB9

System Time preferences

Set defaults for your RB9 job clock.

Continued from Customizing global preferences.

- **Time Zone**

  Select your company's time zone in the drop-down. (The list of time zones is set in System Preferences > Calendar > Time Zone.) Users can select a different time zone for jobs in User Preferences.

- **Automatically adjust for Daylight Savings Time**

  Slide to Yes if you want RB9's job clock to change with daylight savings time.

Reference

- Time Zone preferences
- User Preferences

Step-by-step instructions

- Customizing global preferences
- Entering general job information

Assignment Cancellation preferences

Options and content for emails and text messages that notify resources of assignment cancellations.

Continued from Customizing global preferences.

To add or edit assignment cancellation email and text templates, and choose the default templates for emails and texts, see Customizing communications.

Reference

- Calendar
- Send Assignment Notifications/Cancellations

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Assignment Notification preferences

Options and content for emails, text messages, and iCalendar attachments that notify resources of assignments. Emails can automatically include file attachments from the relevant Firm-, Job-, Task-, and Case-level repositories, as well as the All-Resources repository.

Continued from Customizing global preferences.

1. To add or edit assignment notification email and SMS templates, choose the default template for emails and text, and customize iCalendar attachments, see Customizing communications.

2. Click in the **File types to be automatically attached to email from All-Resources-level, Firm-level, Job-level, Case-level, and Task-level repository** field, then select RB9 file types to be included from the drop-down. File types are set up in Lists > Repository.

   ### NOTE: Override automatic attachments on job tasks

   If you do not want to include files from these repositories on an email notifying a resource about an assignment, you can delete files before sending the email in the Mail Composer. See Composing emails & text messages.

TIP: Include email link for acknowledging jobs

If you have RB Connect, set up your Assignment Notification email message so your resources can acknowledge jobs with one click. Insert the **> Task > AcknowledgementURL** data field into the body of the email (see Customizing emails, messages, web pages & stamps) or the embedded worksheet form (see Editing form Data Fields options).

When resources click the link in the email, it connects to your RB9 Calendar through your RB Connect to automatically set the task's Acknowledged Date to the current date.

TIP: Automatically include blank billing sheet

Make resources' lives a little easier by providing them with a blank billing sheet when notifying them of jobs:

1. Select "Billing Sheet" in **File Type to be automatically attached to email from All-Resources-level, Firm-level, Job-level, Task-level, and Case-level repository** drop-down to have a blank billing sheet automatically attached to these notifications. See Customizing communications.

2. Upload your blank billing sheet to the All-Resources repository with Billing Sheet as its **File Type.** See Uploading files to a repository.

Reference

- Calendar

- Send Assignment Notifications/Cancellations
- Repository lists
- Mail Composer

Step-by-step instructions

- Customizing global preferences
- Customizing communications
- Composing emails & text messages
- Customizing emails, messages, web pages & stamps
- Editing form Data Fields options
- Uploading files to a repository

Default Job Status preferences

Options for job status drop-downs.

Continued from Customizing global preferences.

Job Status

Checked options will be the default Job Status search criteria in Search By panes. See Lookup panel. Job status categories and default are set in Lists > Jobs.

Reference

- Calendar
- Lookup panel
- Jobs lists
- Jobs

Step-by-step instructions

- Customizing global preferences
- Scheduling jobs

Future Calendar preferences

RB9 Standard only

Options and content for emails to clients of their upcoming schedule.

Continued from Customizing global preferences.

To customize Future Calendar email templates, and choose the default template for emails sent to contacts, see Customizing communications.

Reference

- Calendar
- Send Future Calendar

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Holidays preferences

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

Continued from Customizing global preferences.

Holiday

To exclude a holiday from the business days included in calculating due dates for jobs, check the holiday's **Active** box. See Lookup panel.

Reference

- Calendar
- Lookup panel

Step-by-step instructions

- Customizing global preferences

Job Cancellation preferences

Options and content for emails to clients confirming job cancellations.

Continued from Customizing global preferences.

To customize job cancellation email templates, and choose the default template for emails sent to contacts, see Customizing communications.

Reference

- Calendar
- Send Job Confirmations/Cancellations

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Job Confirmation preferences

Options and content for emails and iCalendar attachments to clients confirming jobs.

Continued from Customizing global preferences.

To add or edit job confirmation email templates, choose the default template for emails, and customize iCalendar attachments, see Customizing communications.

Reference

- Calendar
- Send Job Confirmations/Cancellations

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Job Status Automation preferences

Job status can update automatically when a job confirmation is sent to the client, when a resource is assigned to a task, when an assignment notification is sent to a resource, and when a new shipment has been added.

Continued from Customizing global preferences.

Trigger

To change the job statuses that different events trigger, click the **Status to be** selection for a **Trigger** event and select the new status that a job will update to when the event occurs. Job statuses are set up in Setup > Lists > Jobs > Status.

Reference

- Calendar
- Jobs
- Jobs lists
- Send Job Confirmations/Cancellations
- Tasks
- Quick Assignments
- Send Assignment Notifications/Cancellations
- Daily Calendar Audit
- Tasks in Progress
- Post Invoices

Step-by-step instructions

- Customizing global preferences

Job Status Color preferences

Color coding for each job status. You can set different colors for how each job status appears in the default RB9 Interface or Dark Mode (reverse/light on dark color scheme). Job listings in Calendar, Turn In, and Billing results grids appear in the color that corresponds to their job status.

Continued from Customizing global preferences.

Job Status

To change the default or dark mode color coding for different job statuses, see Picking colors in RB9.

Reference

- Calendar
- Jobs (List View)
- Jobs (Monthly View)'s daily jobs popups
- Send Job Confirmations/Cancellations
- Tasks
- Quick Assignments
- Send Assignment Notifications/Cancellations
- Daily Calendar Audit
- Tasks in Progress
- Turn In
- Letters
- Post Invoices

Step-by-step instructions

- Customizing global preferences
- Picking colors in RB9

Jobs (Monthly View) preferences

Defaults for month-at-a-glance job calendars.

Continued from Customizing global preferences.

- **Line Data for Monthly View**

  In these 2 drop-downs, select which type of information you want to appear on the monthly calendar to identify jobs.

- **Maximum jobs per day in Monthly View**

  Your monthly calendar displays as many settings per day as possible up to the number selected here.

  If there are more jobs scheduled for a day than the maximum set here, the day's space includes a note of the number of additional settings for the day, which are accessible by clicking the note.

Reference

- Calendar
- Jobs (Monthly View)

Step-by-step instructions

- Customizing global preferences
- Viewing job calendars

Jobs (Weekly View) preferences

Defaults for week-by-week job calendars.

Continued from Customizing global preferences.

- **Line Data for Weekly View**

  Start Time and Job No. are fixed data in weekly calendar entries and cannot be changed. In the drop-down, select the third type of information you want to appear on the weekly calendar to identify jobs.

- **Display Height per day in Weekly View**

  The weekly calendar displays each weekday with enough space vertically for the number of rows selected here. Each row can list one job, and there is no word wrapping, so if a job listing is too long, it will be cut off but details are easily visible if the user rolls over the listing.

  If there are more jobs scheduled for a day than the maximum set here, the day's space includes a scroll bar so you can access the jobs that are not visible at first.

Reference

- Calendar
- Jobs (Monthly View)

Step-by-step instructions

- Customizing global preferences
- Viewing job calendars

New Job preferences

Defaults for new job settings.

Continued from Customizing global preferences.

- **Automatically add default task when new job is created.**

  In RB9, tasks are different aspects of jobs that can be assigned to resources. Slide to Yes to have a default task included when creating a new job. (Set up tasks and their default in Lists > Jobs.)

- **End Time**

  Click ◷ and select a default time for new job depos to finish in the drop-down.

- **Give a warning when ordering firm has over x amount of past due**

  Slide to Yes to have RB9 pop up a warning when you select a new job's ordering firm, and they have an overdue amount that is older and larger than a cut-off you specify.

- **Past Due Days**

  If you selected Yes for the warning popup to appear, enter the number of days outstanding amounts must be past due to qualify for a warning. Default is 100 days.

- **Past Due Amount**

  If you selected Yes for the warning popup to appear, enter the dollar amount outstanding amounts must be over to qualify for a warning. Default is $1.00.

- **Next Job No.**

  Click ⋮ **> Reset Next Job No.** In the **Reset Next Job No.** panel, enter a new starting number for future jobs in ***New Next Job No.** *(required).* Then click **Save.**

Reference

- Calendar
- Jobs
- Tasks
- Jobs lists
- Jobs (List View)
- Jobs (Monthly View)
- Jobs (Weekly View)

Step-by-step instructions

- Customizing global preferences
- Scheduling jobs

Overdue Tasks Report preferences

Options and content for emails that notify resources of overdue tasks.

Continued from Customizing global preferences.

To customize Overdue Task Report emails, see Customizing communications.

Reference

- Calendar
- Send Overdue Tasks Report

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Resource Blast preferences

RB9 Standard only

Options and content for emails and text messages that notify resources of immediate job opportunities.

Continued from Customizing global preferences.

- To add or edit Resource Blast email and text templates, and choose the default templates for blasts, see Customizing communications.
- If Setup > System Preferences > General > SMS > Vendor is set to SMS Email Gateway Service, **Number of emails to send at one time** appears. Select a number in the drop-down for the maximum number of resource email addresses to "blast" at a time. High numbers can improve sending speed — but higher numbers might be treated as spam mail from receiving mail servers. Balance your speed requirements with the security precautions of your resources' mail servers.

Reference

- Calendar
- Resource Blast
- SMS preferences

Step-by-step instructions

- Customizing global preferences
- Customizing communications
- Sending urgent requests for help

Tasks (Monthly View) preferences

Defaults for month-at-a-glance task calendars.

Continued from Customizing global preferences.

- **Line Data for Monthly View**

  In these 2 drop-downs, select which type of information you want to appear on the monthly calendar to identify tasks.

  NOTE: Task start time vs. job start time

  If you select Start Time as one of the options displayed on the calendar, the task's scheduled start time will be displayed if it is different from the job's start time. If no start time has been set for the task then the job's start time will be displayed.

- **Maximum tasks per day in Monthly View**

  Your monthly calendar displays as many settings per day as possible up to the number selected here.

  If there are more tasks scheduled for a day than the maximum set here, the day's space includes a note of the number of additional settings for the day, which are accessible by clicking the note.

Reference

- Calendar
- Tasks (Monthly View)

Step-by-step instructions

- Customizing global preferences
- Viewing job calendars

Time Zone preferences

Time zones included in **Time Zone** drop-downs.

Continued from Customizing global preferences.

Time Zone

Select which time zones appear in **Time Zone** drop-downs by checking their **Active** boxes. Click **Save** when finished selecting time zones.

Users select which time zone is their default in User Preferences.

Reference

- Calendar
- User Preferences

Step-by-step instructions

- Customizing global preferences
- Entering general job information

Zoom preferences

Include your Zoom account settings and preferences, and customize your Zoom meeting invitation email, so you can save time setting up Zoom when your job location is online. You can override any defaults when scheduling a Zoom meeting. See Scheduling Zoom meetings.

Continued from Customizing global preferences.

1. Before you can set up Zoom preferences in RB9, you must register with Zoom for a developer account and generate app credentials. See Generating your Zoom credentials.

2. In the **Calendar – Zoom** panel, click **Edit.** Then enter/make selections:

   - **App Type**

     Select the app you created credentials for on the Zoom site:

     - **Server-to-Server OAuth** – Default. This is the only app that will work for using Zoom with RB9.

   - ***Client ID**

     Required

     Enter the client ID you generated in your Zoom account.

   - ***Client Secret**

     Required

     Enter the secret code you generated in your Zoom account.

   - ***Account ID**

     Required

     Enter the account ID you generated in your Zoom account.

   - **Topic**

     Edit/enter text. Add data fields by clicking your cursor in the field where you want to insert a data field, then click [=] **> [category] > [data field].**

   - **Description**

     Edit/enter text. Add data fields by clicking your cursor in the field where you want to insert a data field, then click [=] **> [category] > [data field].**

   - **Video Host**

     If you want to start meetings with the host's video on, slide to Yes. If you want to turn it on when you enter a meeting, slide to No.

- **Video participant**
  Default is No. If you want to start meetings with all participants' video turned on, slide to Yes. Participants can still turn their own video off and on during the meeting.

- **Allow participants to join anytime**
  Default is Yes. If you do not want meeting participants to join meetings before the host arrives, slide to No. If you enabled the **Waiting Room,** this option will not work.

- **Mute participants upon entry**
  Default is No. Slide to Yes if you want to have meeting participants muted at first; you can unmute them later during meetings or allow them to unmute themselves.

- **Automatically record meeting (if selected option is unavailable, this option will be ignored)**
  Select where you want records of meetings saved:

  - **None** – Default is to not record meetings.
  - **Cloud** – To save meeting recordings in the Zoom account assigned to the meeting.
  - **Local** – To save meeting recordings to the computer used to host the meeting.

- **Waiting Room**
  If you want to control how participants enter meetings, slide to Yes.

- **Host URL to**
  Select where the host's sign-in URL will appear:

  - **Resource Notification Notes** – If an assigned resource (someone other than you) will be hosting.
  - **Scheduling Notes** – If you or another RB9 user in your company will be hosting.

- **Join URL to**
  Select where the participants' sign-in URL will appear when Zoom meeting is scheduled:

  - **Confirmation Notes** – URL will also appear on Job Confirmation forms if you have included the Confirmation Notes data field in the Job Confirmation form template. This is an easy way to share the URL before the event with the ordering client. (See Editing form Data Fields options.)
  - **Job Location** – Meeting URL will appear in the **Job Location** pane's **URL** field.

3. Click **Save.**

Reference

- Calendar
- Lookup panel
- User Preferences

Step-by-step instructions

- Scheduling Zoom meetings
- Customizing global preferences
- Generating your Zoom credentials
- Editing form Data Fields options
- Entering job locations

Generating your Zoom credentials

Before using Zoom as an online meeting option, register with Zoom for a developer account and generate app credentials to use in RB9.

1. Go to: https://marketplace.zoom.us
2. Click **Sign In.**
3. On the Sign In screen, enter your Zoom registered **Email Address** and click **Next.** (If you do not have a Zoom user account, you can register here.)
4. Enter your password in **Password,** then click **Sign In.**
5. On the **Zoom's Marketplace Terms of Use** popup, click **Agree.**
6. In the top menu on the Zoom App Marketplace screen, click **Develop > Build App.**
7. On the **Zoom's API License and Terms of Use** popup, click **Agree.**
8. On the **What kind of app are you creating** popup, select **Server to Server OAuth App.** Then click **Create.**
9. On the **Create a Server-to-Server OAuth app** popup, enter "RB9" (or whatever you want to call your Zoom app) in **App Name.** Then click **Create.** Zoom generates your app.
10. Back on the Zoom App Marketplace screen, copy and save the **Account ID, Client ID** and **Client Secret** information to enter in RB9.
11. Click **Continue.**
12. In the **Information** section, enter all required information:
    - Under **Basic Information,** enter **Company Name.**
    - Under **Developer Contact Information,** enter **Name** and **Email address.**
13. Click **Continue.**
14. In the **Feature** section, click **Continue.**
15. In the **Scopes** section, click **Add Scopes.**
16. In the **Add scopes** popup under **Product,** click **Meetings.** Then select:
    - **View a meeting**
    - **View a user's meetings > View a user's meetings**

- **Update a meeting > Update a meeting**
- **Delete a meeting > Delete a meeting**
- **Create a meeting for a user > Create a meeting for a user**

17. Under **Product,** click **User.** Then select:
    - **View a user > View a user**
    - **View groups > View groups**
    - **View a group's member** > **View a group's member**
18. Click **Done,** then **Continue.**
19. When the "Your app is ready for activation" message appears, click **Activate your app.**
20. When you receive Server-to-Server OAuth App activation confirmation, your App creation is completed.
21. Log into the web portal Zoom (https://zoom.us/) as an Administrator.
22. Click on the profile image at the top right of the screen, then click **Settings.**
23. Go to **ADMIN > User Management > Roles > Roles Settings > Advanced features.**
24. Check the **View** and **Edit** boxes for **Server-to-server OAuth App.**
25. Enter your **Client ID, Client Secret,** and **Account ID** saved in step 10 in RB9. See Zoom Preferences.

Reference

- Calendar
- Zoom Preferences

Step-by-step instructions

- Customizing global preferences
- Entering job locations

Envelopes preferences

RB9 Standard only

Set defaults for printing envelopes from RB9'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** drop-down, either:
   - **Select a different standard envelope size** in the dropdown.
   - **Choose "Custom,"** 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

RB9 Standard only

Enter FedEx account information into RB9 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 RB9, 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**

     Uneditable. Default is OAuth2.
   - ***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 RB9. 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 RB9. (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

RB9 Standard only

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 RB 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 RB 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.

  - ### Logging download activity for resources

    Files downloaded by resources through RB Connect.

Reference

- Production
- Repository
- RB Connect

Step-by-step instructions

- Customizing global preferences
- Tracking inhouse and online repository access

Signature Proxy preferences

RB9 Standard only

Settings for using RB Digital Signature Proxy to apply reporters' signatures to RB-PDF Transcripts.

Continued from Customizing global preferences.

1. In the **Production – Signature Proxy** panel, default settings for your ReporterBase Digital Signature Proxy (RB-DSP) appear. To update, click **Edit.**

   - **Agency Signature**

     To add or update the signature you apply to RB-PDF Transcripts that represents your agency, see Setting your agency's digital signature.

   - **Users to notify for Certificate Info**

     To add/update which RB9 users are alerted via Notifications and Messages when a reporter submits their Signature Proxy ID and password, see Managing users to notify.

     TIP: Missing users to notify? Email addresses must be associated with an RB9 user

     If you used an earlier version of RB Digital Signature Proxy, the email address that was set to receive Signature Proxy ID and password submission alerts on ReporterBase.net must be tied to an existing RB9 user for the user to appear here automatically. If you used an email address that is not in an existing RB9 user's profile, it will not port over — you must select users from your RB9 database. You can select any user — they do not need an email address because these notices come through RB9's internal Notifications and Messages function.

   - **Invitation**

     To customize email templates, and choose the default template for emails sent to reporters to invite them to sign up to use your RB Digital Signature Proxy service and register their free digital signatures, see Customizing communications.

Reference

- Production
- RB-PDF Transcripts
- RB Digital Signature Proxy
- ReporterBase.net
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Setting your agency's digital signature
- Managing users to notify
- Customizing communications

Setting your agency's digital signature

In addition to applying reporters' digital signatures to RB-PDF Transcripts, you can apply your agency's signature too. Upload an image of your signature or draw one directly in RB9.

Continued from Signature Proxy preferences.

In the **Production - Signature Proxy** panel, you can upload an image of your agency's signature or draw it in the program. To:

- ## Upload an image

1. Click .
2. In the **Upload Signature** panel, print out the **Signature Guide Form**.
3. Sign your name in black ink in the solid box on the form. Make sure that your signature does not extend beyond the borders.
4. Scan or take a picture the form and save as PNG or JPG format.
5. Crop the image down to your signature without borders and save as PNG or JPG format.
6. Upload your final signature image in one of 2 ways:
   - **Drag and drop** your file into the dotted-border field.
   - **Click the dotted-border field,** then locate and select your file from your computer.
7. The file you selected will appear in the field. If you selected the wrong file to upload, click .
8. When finished, click **Upload.**

- ## Draw a signature

1. Click .
2. In the **Draw Signature** panel, click and drag inside the box to write your signature.
3. Click **Clear** if you want to start over.
4. When you are satisfied with the signature, click **Save.**

Reference

- RB-PDF Transcripts
- RB Digital Signature Proxy
- ReporterBase.net

Step-by-step instructions

- Customizing global preferences

UPS Account for Shipping Labels preferences

RB9 Standard only

Enter UPS account information into RB9 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 RB9.
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 RB9, 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**

     Uneditable. Default is OAuth2.
   - ***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 RB9. 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 RB9. (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.**

- ## Post Options

  ### When posting an invoice, check whether Pay Rate is not selected or Pay Amount is 0

  Default is Yes. Slide to No if you do not want RB9 to check invoices for Pay Rates or zero pay amounts before posting. See Posting invoices.

- ## Print Options

  - ### Invoice Format

    Select the template that matches your company's payment options in the drop-down:

    - **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.

  - ### Transcript copy is certified

    If you certify copies, slide to Yes to have that description appear on invoices.

  - ### Print job location if it exists

    Slide to Yes to have job location appear on invoices.

- **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.

- **Use (Pages * Units) to print Units**

  Slide to Yes to have (Pages * Units) replace Units on invoices for service items whose **Use Pages for calculation** option is set to Yes in the Service Item Master. See Entering billing & pay rates.

- **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 & stamps). Then if you have RB Connect, when your clients click the hyperlink RB9 generated in the email, it will take them to the invoice in RB Connect so they can easily view and pay the invoice online.

Reference

- Billing
- Accounting lists
- Service Item Master
- Send Invoices
- RB Connect

Step-by-step instructions

- Customizing global preferences
- Posting invoices
- Entering additional firm information
- Entering billing & pay rates
- Selecting preferred or requested services
- Adding & updating individual service items
- Customizing communications
- Customizing emails, messages, web pages & stamps

LEDES 1998B preferences

Options for e-billing *(RB9 Standard only)*.

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 jobs 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 drop-down:

  - **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 RB9 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 RB9 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
- Awarding job points
- Managing contacts’ award points
- Analyzing point activity
- Managing points
- Viewing point history

Payment Receipts preferences

Set default subject line for RB9 payment receipts.

Continued from Customizing global preferences.

To customize the subject line of payment receipt emails, see Customizing emails, messages, web pages & stamps.

Reference

- Receivables
- Send Payment Receipts

Step-by-step instructions

- Customizing global preferences
- Customizing emails, messages, web pages & stamps

Statement preferences

Set preferences and defaults for RB9 statements.

Continued from Customizing global preferences.

- ## Print Options
  - ### Statement Format
    Select the template that matches your company's payment options in the drop-down:
    - **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 RB9.

- ## 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 RB9
- Customizing communications

1099 Form preferences

Options to make RB9 information print properly on your 1099-NEC forms.

Continued from Customizing global preferences.

- **Additional Top Margin (inch)**

  Enter amount using inches to move information down on forms. Enter negative amounts to move information up on forms. Can be decimals, up to 2 placements (hundredths).

- **Additional Left Margin (inch)**

  Enter amount using inches to move information right on forms. Enter negative amounts to move information left on forms. Can be decimals, up to 2 placements (hundredths).

Reference

- Payables
- Print 1099 Forms

Step-by-step instructions

- Customizing global preferences
- Printing 1099-NEC forms

Check preferences

Options to make RB9 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 resource payroll checks

Draft Pay Statement preferences

Options to customize emails that accompany draft pay statements to resources.

Continued from Customizing global preferences.

- To customize draft pay statement email templates, and choose the default template for emails sent with draft pay statements, see Customizing communications.
- To choose the order in which invoices appear on the draft pay statement PDF, select an option in the **Sorting in Draft Pay Statement** dropdown:
  - **Invoice Date** – To sort by posted dates chronologically, oldest first.
  - **Invoice No.** – To sort by invoice numbers, lowest to highest.
  - **Job Date** – Default. To sort by scheduled job dates chronologically, oldest first.
  - **Job No.** – To sort by job numbers, lowest to highest.

Reference

- Payables
- Pay Resources

Step-by-step instructions

- Customizing global preferences
- Customizing communications

NACHA preferences

National Automated Clearing House Association

Information for direct depositing resource pay.

Continued from Customizing global preferences.

1. Bank Information

- **Immediate Origin Name**

  Your company's name as it appears on your banking account.

- ***Immediate Origin**

  Required. Ten-digit number assigned to you by your bank once they approve you to originate ACH files through them.

- **Immediate Destination Name**

  Name of your bank.

- ***Immediate Destination**

  Required. Your bank's routing number.

2. Company Information

- **Company Name**

  Your company name as it will appear on resource statements from their banks.

- **Discretionary Data**

  Optional field you may use to describe the payments for internal accounting purposes.

- ***Company Identification**

  Required. Number assigned to you by your bank.

- ***Bank Account No.**

  Required. Your account's routing number.

3. Options pane

- **Do not export Debit entry**

  Slide to Yes if you do not want the debit entry in your NACHA file.

Reference

- Payables
- NACHA

Step-by-step instructions

- Customizing global preferences
- Exporting checks for direct deposits

Pay Statement preferences

Options to customize emails that accompany resource pay statements.

Continued from Customizing global preferences.

To customize pay statement email templates, and choose the default template for emails sent with pay statements, see Customizing communications.

Reference

- Payables
- Send Resource Pay Statements

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Payroll preferences

Options for when you pay resources.

Continued from Customizing global preferences.

Payroll Term

Select an option:

- **Hard Wait**

  If you wait a fixed number of days (e.g. 30 or 60) before you release payment to resources — regardless of whether you received payment from clients. Default.

- **Soft Wait**

  If you will release payment for an invoice early if it is paid early.

Reference

- Payables
- Pay Resources

Step-by-step instructions

- Customizing global preferences

Contacts preferences

Set up RB9 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. RB9 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 RB9

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 RB9 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

Resources preferences

System-wide defaults for Resources.

Continued from Customizing global preferences.

- **Default settings for new Resource**
  - **Original Term**

    Number of days from the invoice date before resources are paid on originals:
    - "9999" if you pay only after the client has paid.
    - "0" if you guarantee the original and use a cutoff date to specify the waiting period between when you are paid for an invoice and the resource is paid.
  - **Copy Term**

    Number of days from the invoice date before resources are paid on copies:
    - "9999" if you pay only after the client has paid.
    - "0" if you guarantee the copies and use a cutoff date to specify the waiting period.
  - **Work Schedule**

    Click and drag the beginning and end dots on each day-of-the-week's sliders to set the default resource availability for each day.
- **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 resources' Full Name fields.
  2. Repeat step 1 to add other name data fields in the order you want them to appear in resources' Full Name fields. RB9 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

- Resources
- Cutoff Date

Step-by-step instructions

- Customizing global preferences

Email Log preferences

RB9 Standard only

Designate which types of RB9 emails you want to keep track of and how long you want to store them.

IMPORTANT: Attachments are saved along with emails

When RB9 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, so only select 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 RB9 should keep an email in the log.

- **Logging**

  All email types are set to be logged into the Email Log as the default. Slide the slider for any email types you do not need to log to No.

Reference

- Email Log

Step-by-step instructions

- Customizing global preferences

QuickBooks preferences

RB9 Standard only

Set system-wide defaults for QuickBooks Integrator.

Continued from Customizing global preferences.

QuickBooks Edition

Select your version of *QuickBooks* in the drop-down:

- ### 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 RB9 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 RB9

    Before you can import RB9 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 RB9.

- ### 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 RB9. 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 RB9

Generating QuickBooks online credentials

RB9 Standard only

If you subscribe to *QuickBooks,* you must set up a developer account with Intuit, then add the credentials to your RB9 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 verification code to the phone number you entered in the previous step. Enter the code and click **Continue.**
5. You will be redirected to the Intuit Developer website's Terms of Service page. Check **I accept the Intuit Developer Terms of Services,** then click **Submit.**
6. On the **Welcome** screen, answer the required questions, then click **Done.** If you do not wish to answer these questions, click **Do this later.**
7. A verification email will be sent to the registered email. Click **Verify my email** in the email.
8. You will be automatically directed to the Email address verified webpage. Click **Continue.**
9. Return to the browser tab where you were signing up and click **My Hub > Account Profile** in the upper right corner of the screen.
10. Fill in all of the required fields in the **About You** screen. Then click **Save.**
11. Click **My Hub > App Dashboard.**
12. On the Sample Workspace screen, click **Workspaces** in the upper left corner.
13. If the **Update your company address** popup appears, fill in **Country** and click Next. Then fill in your **Address** and click **Next.** Then click **Close.**
14. On the Workspaces screen, click the **+** on the right.
15. On the Create a workspace screen, click **Get Started.**
16. On the Basic workspace info screen, enter 'RB9' in **Workspace name,** then click **Next.**

17. On the Info about your company screen, fill in the required fields, then click **Next.**
18. On the Contact info for your company screen, fill in the required fields, then click **Next.**
19. When the Your workspace is ready to go screen appears, click **Open workspace.**
20. Click **+** on the **Apps** tab.
21. On the Use apps to organize data and connect to APIs screen, click **Get Started.**
22. On the Tell us about your app screen, enter 'RB9' in **App name,** then click **Next.**
23. On the Add permissions screen, check **com.intuit.quickbooks.accounting,** then click **Done.**
24. In the Add these permissions popup, click **Confirm.**
25. When the Your app is ready for testing screen appears, click **Open app.**
26. In the Intuit Developer screen, cick **Keys and credentials** in the left menu.
27. Click **Production** in the main screen area.
28. Click **Review your Intuit Developer Portal Profile and verify your email.**
29. Fill in any missing required information, then click **Next.**
30. In the **Add your app's end-user license agreement and privacy policy** section, enter the following information, then click **Next.**

Field	Data
End-user license agreement URL	https://www.omti.com/company/terms-of-use.html
Privacy policy URL	https://www.omti.com/company/privacy.html

31. In the **Add your app's host domain, launch URL, and disconnect URL** section, enter the following information, then click **Next.**

Field	Data
Host domain	reporterbase.com
Launch URL	https://*your_host_name*.reporterbase.com
Disconnect URL	https://*your_host_name*.reporterbase.com

32. In the **Select at least one category for your app** section, check **Billing** and **Invoicing,** then click **Next.**
33. In the **Tell us about any regulated industries that use your app** section, check **None of the above,** then click **Next.**
34. In the **Tell us where your app is hosted** section, select "United States" in the **Country** dropdown.
35. Select **Single IP address,** then type "13.88.20.159" in the **IP address** field.
36. Click **Next.**
37. Click **Compliance.**
38. In the **App assessment questionnaire** section, click **Start questionnaire.**
39. This opens a new browser tab. RB9 should appear in the first field by default. If it does not, select "RB9" in the dropdown.
40. On the **General Questions** tab, select the following answers:

Question	Answer
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. 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:	Yes

To enhance, streamline, or improve yours or others' QuickBooks experience • To facilitate a business process (e.g. syncing QBO data to another service)	
5. 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) located or doing business in jurisdictions subject to comprehensive embargoes or comprehensive sanctions, as relevant under applicable law, including Belarus, Cuba, Iran, North Korea, Russia, Syria and the regions of Crimea, Zaporizhzhia and Kherson, the Donetsk People's Republic ('DNR') and Luhansk People's republic ('LNR') in Ukraine?	No
6. Does your application involve any generative AI functionality, including but not limited to ChatGPT, GPT-3 or 4, Google's Gemini, conversational chatbots, etc.?	No

41. Click **Next Tab.**

42. On the **App Information** tab, select/enter the following answers:

Question	Answer
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 manages 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

43. Click **Next Tab.**

44. On the **Authorization and Authentication** tab, select the answers as follows.

Question	Answer
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):	
1. Errors due to expired access tokens	Yes
2. Errors due to expired refresh tokens	Yes
3. Invalid grant errors	Yes
4. CSRF errors	Yes
7. Does your app rely on the OAuth playground or other offline tools to get access or refresh tokens tokens?	No

45. Click **Next Tab.**
46. On the **API Usage** tab, select the following answers:

Question	Answer
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

47. Click **Next Tab.**

48. On the **Accounting API** tab, select the following answers:

Question	Answer
1. Which customer-facing version of QuickBooks Online is your app designed for? (Select all that apply)	Simple Start Essentials Plus 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

49. Click **Next Tab.**

50. On the **Error Handling** tab, select the following answers:

Question	Answer
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.

51. Click **Next Tab.**

52. On the **Security** tab, select the following answers:

Question	Answer
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	No

authentication?	
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

53. Click **Submit.** If the Confirmation popup appears, click **Yes.**
54. If a Thank You popup appears, click **OK** or **Close.**
55. Close the App assessment questionnaire browser tab, then select the Intuit Developer website browser tab.
56. Refresh the Intuit Developer page.
57. Click **Compliance** in the left menu.

    The results of the questionnaire review may take approximately 5 minutes. Once the review is complete, the Results will be marked as "Approved" and you can proceed with the rest of the process.
58. Cick **Keys and credentials** in the left menu.
59. In the **Keys & credentials** screen, click **Show credentials.** Copy and separately store the **Client ID** and **Client Secret** information. You will need this information to use QuickBooks Online from RB9. 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 RB9 as well so your QuickBooks Integrator will still work.
60. Click **Settings** on the left menu.
61. Click the **App logo** icon to select the logo that appears when authenticating with QuickBooks Online OAuth. You can download the logo image from the URL below.

    https://omti.com/images/RB9OAuthLogo.png
62. Click **Redirect URIs** tab.
63. Make sure **Production** is selected.
64. Enter the values below in **Development URI requests can be HTTP or HTTPS:**

https://oauth.reporterbase.com/requestquickbooksonlineauthorizationcode

65. Click **Save.**

Reference

- QuickBooks Integrator
- QuickBooks preferences

Step-by-step instructions

- Customizing global preferences
- Customizing communications
- Customizing email preferences

RB Network preferences

Make it easy for other RB9 users to contact you by entering your contact information here. You will be added to the RB Network roster so other RB9 users can find you and contact you directly. You can also update your contact information or remove your offices from the network.

Continued from Customizing global preferences.

1. In the **Tools – RB Network** panel, any of your offices you have already listed in the RB Network roster appear. To:

   - **Add a new office** — Click **New.** See Adding your offices to RB Network.
   - **Update an existing office** — Click the office's hyperlinked **Office Name.** In the **View Office** panel, click **Edit.** See Adding your offices to RB Network.
   - **Delete an office from the list** — Click the office's hyperlinked **Office Name.** In the **View Office** panel, click **Delete.** In the popup that appears, click **Yes.**

   ### TIP: Delete or deactivate an office?

   If you delete the office, it is removed from the list of offices here and in RB Network. If you might want to use that office again in RB Network, slide **Active** in the **Edit Office** panel to No to hide it in the RB Network roster instead of deleting it from your RB9 database.

Reference

- RB Network

Step-by-step instructions

- Customizing global preferences
- Adding your offices to RB Network
- Finding network members

Communicating within RB9

In Notifications and Messages, you can:

- Receive automatic notices and alerts from the system.
- Exchange messages with others within your RB9 system.
- Send messages to pre-determined groups of RB9 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 RB9 users in your company.

Access messages

There are 2 ways to access Notifications and Messages:

- When a message arrives, RB9 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 job notifications are automatically designated as priority messages

Automated notices from RB9 about Rush Turn-In jobs 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 RB9 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
- General > Notifications and Messages

Step-by-step instructions

- Managing groups
- Sending messages

Sending messages

You can send messages to other users in your RB9 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 RB9 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 drop-down. 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 drop-down 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 drop-down 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.

- ***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, & stamps.

- **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.

4. Click **Send.** RB9 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 RB9 functions such as Collections Follow-up reminders to others or yourself or receive automatic messages from other functions and RB Connect, such as transcript orders. See Following up on collection promises.

Reference

- Message Group
- Date Navigator
- Notifications and Messages preferences
- RB Connect

Step-by-step instructions

- Communicating within RB9
- Customizing emails, messages, web pages, & stamps
- Following up on collection promises

Updating your password

You can change your RB9 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 drop-down 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, RB9 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 RB9 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 RB9 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. RB9 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 RB9 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 drop-down that you will use most often when setting new jobs and billing jobs. BUs are set up in Business Units.

  - ### Default row count for grid

    Select a default from the drop-down 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 RB9 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 RB9 tabs. Click **No** to go back and save your data, or click **Yes** to proceed.

- ## New Job

  Customize default settings for new jobs. See Customizing job defaults.

- ## Reports

  ### *Business Unit to be displayed on Report Header

  Required. Select the BU you want to associate with your reports in the drop-down. You can select a different BU from your default BU, if desired.

- ## Notifications and Messages

  - ### Period to check for new messages

    Default is to have RB9 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 RB9 messages also sent to your email address. Hyperlinks in forwarded messages will not work, and reminder messages from RB9 are not forwarded.

- ## 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 RB9 newsletter. Slide to No to unsubscribe.

  - ### Product Update Notification

    Slide to Yes to subscribe to RB9 update notifications. Slide to No to unsubscribe.

- ## 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 RB9 system-wide preferences set in System Preferences > General > Email. To customize email preferences,

select "Use Personal Setting" in the drop-down, 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 RB9 functions that will open automatically when you log in.

  1. In the first **Function 1** dropdown select the RB9 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
- Jobs
- Notifications and Messages
- Email system-wide preferences

Step-by-step instructions

- Customizing job defaults
- Sending messages
- Customizing email preferences

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 and Setting personal preferences.

1. In the **New Email/Edit Email** panel, enter preferences:

- **Protocol**

  In New Email only

  In the drop-down, 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 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 & stamps.

- **Default**

  Slide to Yes to make this email address your primary email address for messages sent in RB9. 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 RB9 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-RB9 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

- Email preferences
- Change Password

Step-by-step instructions

- Setting personal preferences
- Customizing emails, messages, web pages & stamps
- Testing email settings

Customizing job defaults

Customize default settings for new jobs.

1. If not already in the User Preferences window, click **[Your name on the screen] > User Preferences.**
2. In the User Preferences window's **New Job** pane, you can update the selections for:
   - **Time Zone**

     Select your time zone in the drop-down. (The list of time zones is set in System Preferences > Calendar > Time Zone, and the default time zone is set in System Preferences > General > System Time.)
   - **Adjust clock for daylight savings changes**

     Slide to Yes if you want RB9's job clock to change with daylight savings time.
   - **Location City**

     Enter the name of the city where most of your jobs take place.
   - **Location State**

     Select the **Location City's** state, province, or territory in the drop-down.
3. Click **Save.**

Reference

- Jobs
- Time Zone preferences
- System Time preferences

Closing tabs

Every time you log out of RB9, RB9 automatically closes all open tabs (RB9 functions). However, while working in RB9, 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 RB9

While RB9 will automatically log you out after a certain period of inactivity for security reasons, you can also log out of RB9 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: RB9 does not automatically save your work for you when logging out.

RB Connect

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

RB Connect is an optional plug-in to RB9. There is also an **RB Connect Mobile** plug-in that turns your RB Connect into a mobile-optimized version for use on smartphones and other mobile devices.

Reference

- RB Connect Mobile

RB Connect Mobile

RB Connect Mobile is a plug-in to RB Connect that gives your clients, third parties, and resources access to your office through a mobile-optimized version of RB Connect.

Reference

- RB Connect

Sending invitations

After entering new contacts or resources into RB9, email them an invitation to RB Connect that automatically includes their login credentials. You can also customize the email to include other information like important instructions and your company logo.

RB9 Standard only

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.
     - **Resource** – To send invitations to one or more resources.
   - **Firm**
     Contact only
     To invite contact(s) from a single firm. See Looking up firms.
   - **Contact**
     Contact only
     To invite a specific contact, enter all or part of their name.
   - **Resource**
     Resource only
     To invite a specific resource, enter all or part of their name.
   - **Entered Date From/Entered Date To**
     Date or date range of when entities were entered into RB9. Change date range, if desired (see Date Navigator).
3. In the search results, check the box(es) next to any entity you want to invite or check the box in the header to select them all. (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 RB9 or Adding resources to RB9.)
4. Click **Send**. See Emailing & texting from RB9.
5. Click **OK** again in the popup that appears when the invitations have been sent. RB9

notes the success of its emailing for each invitation in the **Result** column.

Reference

- RB Connect
- Date Navigator

Step-by-step instructions

- Looking up firms
- Adding contacts to RB9
- Adding resources to RB9
- Emailing & texting from RB9

Processing back orders

RB9 Standard only

When clients request transcripts on previously billed jobs via RB Connect, you can print an order request form for creating the transcript and change the job's status to back order. Then process the order through RB9.

1. Confirm new requests

1. **Connect > Transcript Ordered**
2. In the Transcript Ordered window, **Order Status** defaults to Not Confirmed. Click to see all new transcript requests sent by clients through RB Connect.
3. Click a hyperlinked **Order No.** to go to its View Transcript Order window.

   ### TIP: Back order shortcut

   When you receive a popup notice that there is a new message/notification and it is a transcript order request, click the **Order No.** in the message to go directly to its View Transcript Order window.

4. In the View Transcript Order window, information about the associated job and previous invoice appear, along with the client's instructions. All fields are uneditable. Click:

   - **Change Status to Back Order** – To change the request's status to Back Order.
   - **Print** – To make a copy of the request. See Printing invoices, statements & reports.

2. Process order

1. **Calendar > Jobs (List View)**
2. Enter the order's job number in **Job No.** and click . The job's **Status** has changed from Billed to Back Order.
3. Click the hyperlinked job number. Then click **Edit** in the View Job window.
4. Enter the task and assign the resource (see Entering tasks).
5. After assigning resources, notify them about their assignments (see Sending individual assignment notifications).
6. As the order is produced and shipped, update its status (see Changing case or job status).

NOTE: Clients can track order status in RB Connect

For the client in RB Connect, a job's **Request Order** option disappears from the Order Transcript window after they submit a request so they cannot accidentally back order more than one transcript for the job. They can review the details of their transcript order and track its progress in RB Connect.

Reference

- RB Connect
- Notifications and Messages

Step-by-step instructions

- Communicating within RB9
- Printing invoices, statements & reports
- Entering tasks
- Sending individual assignment notifications
- Changing case or job status
- Managing back orders

Managing back orders

RB9 Standard only

In addition to confirming transcript requests, you can also monitor a back order's current status and view details.

1. **Connect > Transcript Ordered**
2. In the Transcript Ordered window, restrict your search with **Search By** filters:
   - **Order Status**
     - **Not Confirmed** – Default. Pending requests for transcripts. See Processing back orders.
     - **Confirmed** – Select this option and set at least one other search filter to see active back orders.
     - **ALL** – Select this option and set at least one other search filter to see both pending requests and active back orders.
   - **Order No.**

     The order number that RB9 generates for the transcript request made through RB Connect.
   - **Job No.**

     The RB9 job number associated with the transcript requested.
   - **Order Date From/Order Date To**

     An order date is the date a transcript was ordered for a previously billed job. Enter a date range, if desired (see Date Navigator).
   - **Firm**

     Click to select the firm requesting a transcript in the Lookup Firm popup. See Looking up firms.
   - **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). BUs are set in Business Units.
3. Click . RB9 lists all back orders that meet the search criteria.
4. Click a hyperlinked **Order No.** to go to its View Transcript Order window to see the transcript's current status and order details.

Reference

- RB Connect
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Processing back orders
- Looking up firms

Fulfilling online reward point requests

RB9 Standard only

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 drop-down.

   - **Date Type**

     Fulfilled Redemption Status only

     Select an option in the drop-down:

     - **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 RB 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 and find the firm in the **Lookup Firm** panel. 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. RB9 lists all of the requests that meet the specified search condition(s). To fulfill requests, check the box next to the request(s) you want to fulfill, or check the box in the header to select them all.

4. Click **Fulfill.** In the Fulfill popup, you can enter notes about the redemption in the **Remarks** field.

5. Click **OK.** RB9 processes the redemption, removing the request from the results pane, and moving it to the contact's Reward Points History.

Reference

- RB Connect
- Award Points
- Date Navigator
- Reward Points History

Step-by-step instructions

- Looking up firms

Assembling transcript packages

RB9 Standard only

Use the Transcript Packages function to create interactive transcripts designed to work on a variety of devices.

1. Find ASCII file to convert

To search for an ASCII file to convert to a transcript package, see Searching transcript packages.

2. Create package

1. Click the radio button of the ASCII file you want to assemble a package for, then click **Create.** (Files without radio buttons are previously created transcript packages.)
2. In the New Transcript Package window, the information in the **File Info** pane is uneditable. If you would like to download a copy of the ASCII file selected, click next to **File Name.**

3. Attach files

1. Any related exhibit files appear in the **Exhibits** pane. To automatically add exhibits to the package, check the **File Name** box in the pane header. Uncheck any individual file's boxes that you do not want to include in the package.
2. Any related video files appear in the **Videos** pane. To automatically add videos to the package, check the **File Name** box in the pane header. Uncheck any individual file's boxes that you do not want to include in the package.
3. Any related other files, such as the original ASCII file or RB-PDF Transcripts, appear in the **Other Files** pane. To automatically add these files to the package, check the **File Name** box in the pane header. Uncheck any individual file's boxes that you do not want to include in the package.

   NOTE: Supporting files must be published with access for contacts

   Like transcripts, only exhibits, videos, and other files that are set to **Publish** with an **Access Type** of ALL or Contacts and Office will be available to add to transcript packages. See Viewing & updating repository file details.

4. Finish package

1. Click **Save.**
2. RB9 processes the package and opens the Edit Transcript Package window. To add/remove files, automatically hyperlink exhibits to the transcript, preview the package, and alert clients that their transcript packages are available through RB Connect, see Editing transcript packages.

IMPORTANT: Files must be identified correctly

Transcript packages are created using the original ASCII text or page-image file. Only ASCII files that have been designated as ASCII in the **File Type** drop-down when uploaded to the Witness Repository will appear in the New Transcript Package search results grid. (See Updating witnesses and Uploading files to a repository.) If you used a different name (such as Transcript) for this type of file, change the **File Type** name to ASCII using the **Merge To** function in Lists. See Merging data.

Similarly, only files with the **File Type** of Exhibit and Video will appear in Transcript Packages' **Exhibits** and **Video** panes, so if you have used a different file type for these files, use **Merge To** to give them the proper file type.

Reference

- RB Connect
- ASCII

Step-by-step instructions

- Searching transcript packages
- Viewing & updating repository file details
- Editing transcript packages
- Updating witnesses
- Uploading files to a repository
- Merging data

Editing transcript packages

RB9 Standard only

After assembling a transcript package, you can add/remove files, automatically hyperlink exhibits to the transcript, preview the package, and alert clients that their transcript packages are available through RB Connect.

Continued from Assembling transcript packages.

1. In the Edit Transcript Package window, you can:

   - **Add more supporting files**

     To add a file, click . In the **Add Exhibits** panel, any related files that were not added to the transcript package appear. Check the box(es) of file(s) you want to add, then click **Save.**

   - **Remove attached files**

     To remove a file from the package, check its box, then click . In the popup that appears, click **Yes.**

   - **Hyperlink exhibits**

     To include hyperlinks in the transcript to the attached exhibit files, see Using alias patterns.

2. To view the package, see Previewing transcript packages.

3. To notify contacts that the package is available online or on their mobile devices, click **More > Send Notifications.** See Alerting clients.

IMPORTANT: Files must be identified correctly

Transcript packages are created using the original ASCII text or page-image file. Only ASCII files that have been designated as ASCII in the **File Type** drop-down when uploaded to the Witness Repository will appear in the New Transcript Package search results grid. (See Updating witnesses and Uploading files to a repository.) If you used a different name (such as Transcript) for this type of file, change the **File Type** name to ASCII using the **Merge To** function in Lists. See Merging data.

Similarly, only files with the **File Type** of Exhibit and Video will appear in Transcript Packages' **Exhibits** and **Video** panes, so if you have used a different file type for these files, use **Merge To** to give them the proper file type.

Reference

- RB Connect
- ASCII

Step-by-step instructions

- Assembling transcript packages
- Searching transcript packages
- Viewing & updating repository file details
- Using alias patterns
- Previewing transcript packages
- Alerting clients
- Updating witnesses
- Uploading files to a repository
- Merging data

Previewing transcript packages

RB9 Standard only

Before notifying contacts that their transcript packages are available, check that they display correctly and have all of their supporting files.

Continued from Editing transcript packages or Searching transcript packages.

1. In the View Transcript Package/Edit Transcript Package window, click **More > Preview Transcript Package.**
2. The transcript appears in the **Preview Transcript Package** panel. You can move through the transcript in several ways:
   - Click the and arrows to move page by page through the document.
   - Click the and arrows to jump to the beginning or end of the document.
   - Click **Search,** then enter text in the popup field and click .
   - Click **Go To,** then enter a page number in the pop-up **Page No.** field and click . The transcript will automatically advance to the page specified.
3. If the transcript has attached exhibits, videos or other files, they will be listed in designated panes in the **Preview Transcript Package** panel. If you want to download any files, check their box(es), then click .
4. To view transcript details, such as the reporter's name, click **Properties.** The **Properties** panel appears with current information about the transcript in a read-only format. Click **Close.**
5. To export different versions of the transcript, including AMICUS, condensed, and word list to your desktop, click **Export.** In the **Export** panel, click the radio button for the type of file you want to export:
   - **AMICUS**

     Default. Specific ASCII file format.
   - **Full-page Transcript**

     To create an RB-PDF Transcript, click **Next.** To changes any settings, see Setting general RB-PDF Transcript preferences.
   - **Condensed Transcript**

     To create a reduced size RB-PDF Transcript, click **Next.** To changes any settings, see

Setting general RB-PDF Transcript preferences and Setting condensed transcript preferences.

Also, enter numbers in **Do not condense first X pages** and **Do not condense last X pages** if you want to keep some pages at the start and end of the transcript at 100%.

- **Word Index**

  To create a list of words appearing in the transcript with page references, click **Next.** To changes any settings, see Setting general RB-PDF Transcript preferences and Setting word index & word list preferences.

- **Word List**

  To create a list of words appearing in the transcript with the number of times each word appears, click **Next.** To changes any settings, see Setting general RB-PDF Transcript preferences and Setting word index & word list preferences.

- **Highlights**

  Not available. Highlights are used by contacts only in RB Connect.

- **Notes**

  Not available. Notes are used by contacts only in RB Connect.

6. Click **Export** to save the file to your device.

Reference

- RB Connect
- AMICUS
- ASCII
- RB-PDF Transcripts
- Condensed Transcripts
- Word Index
- Word List

Step-by-step instructions

- Editing transcript packages
- Searching transcript packages
- Setting general RB-PDF Transcript preferences
- Setting condensed transcript preferences
- Setting word index & word list preferences

Searching transcript packages

RB9 Standard only

Search for ASCII files to create interactive transcripts from, or search for finished transcript packages.

1. **Connect > Transcript Packages**
2. In Transcript Package's **Search By** pane, no specific filter is required, but you must use at least one:
   - **Job No.**

     Enter the number of the job you want to create a package for.
   - **Job Date From/Job Date To**

     Enter a date range that includes the scheduled job, if desired (see Date Navigator).
   - **Witness**

     Enter part of a deponent's name.
   - **Created By**

     Finished Transcript Packages only

     Click to select a user name from the **Lookup User** popup. All users are listed in the panel by default. To restrict the results, enter part of a user's name in **Search Criteria** and click . To select a user, click their hyperlinked name.
   - **Date Type**

     Finished Transcript Packages only

     - **Created Date** – Default. Date the package was made.
     - **ASCII Upload Date** – Date the ASCII file the package was made from was uploaded to RB9.
   - **Date From/Date To**

     Finished Transcript Packages only

     Works with **Date Type.** 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 files tied to specific BUs (see Lookup panel). BUs are set in Business Units.
3. Click . All files that fit the search criteria appear in the grid. Files with radio buttons

are ASCII files, files without radio buttons are previously created transcript packages.

IMPORTANT: ASCII files must be published before processing

Only files that have been set to **Publish** (on RB Connect) with an **Access Type** of ALL or Contacts and Office can be processed into Transcript Packages. If RB9 does not display a file you are looking for, either it is missing or has been filed incorrectly. See Viewing & updating repository file details.

4. To create a new transcript package, see Assembling transcript packages.
5. To view, edit or send clients notifications about a finished transcript package, click its hyperlinked file name. In the View Transcript Package window:
   - **To edit the file,** click **Edit.** See Editing transcript packages.
   - **To preview the transcript package,** see Previewing transcript packages.
   - **To notify contacts** that the package is available online or on their mobile devices, click **More > Send Notifications.** See Alerting clients.

Reference

- RB Connect
- ASCII
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Viewing & updating repository file details
- Assembling transcript packages
- Editing transcript packages
- Previewing transcript packages
- Alerting clients

Creating Full-Text Search

RB9 Standard only

If you have the Full-Text Search plug-in, you can index files so contacts can search them for specific words in their RB Connect repositories and get results in seconds.

1. **Connect > Create Full-Text Search**
2. **Repository Level** and **File Type** both default to ALL. To use these filters:
   - **Repository Level**

     To search for files in a single repository, select it in the drop-down.
   - **File Type**

     To restrict results to specific file type(s), click . In the Lookup File Type popup, uncheck the File Type box, then check the box(es) of the file type(s) you want to search. Click **OK.**
3. No particular search filter is required, but you must use at least one of these filters:
   - **File Name**

     Enter part of the file name.
   - **Date Type**
     - **Upload Date** – Default. To find files by the date they were uploaded.
     - **Job Date** – To find files by the date of the related job.
     - **Invoice Date** – To find files by the date job was billed.
   - **Date From/Date To**

     Works with **Date Type.** Enter a date or date range. See Date Navigator.
   - **Job No.**

     To find files for one job, enter its job number.
   - **Invoice No.**

     To find files related to one invoice, enter its invoice number.
   - **Case**

     To find files related to a case, look up the case. See Looking up cases.
4. Click . Files that fit your search criteria appear. Any files that have already been indexed have a checkmark in the **Full-Text Search** column. To view details about any file or download the file, click its hyperlinked **File Name.** See Viewing & updating repository file details.

5. Check the box of any files you want to be text-searchable or check the box in the header to select all.

6. Click **Create Full-Text Index.** When a popup appears:

   - **Unpublished files cannot be used to create full-text indexes. Please set to Publish first.**
     Click the hyperlinked file name. In the View Repository window, click **Edit.** Check the **Publish** box, then click **Save.** Click **Create Full-Text Index** again.

   - **Access Type must be "ALL" or "Contacts and Office" to create full-text index.**
     Click **OK.** Then click the hyperlinked **File Name** of the selected file. In the View Repository window, click **Edit,** then select one of the required types in the **Access Type** drop-down and click **Save.**

   - **The file '[file name]' does not support text extraction.**
     There is no text in the file to extract. Uncheck the file's box.

   - **The operation was successful.**
     Click **OK.** A checkmark appears in the file's **Full-Text Search** column.

7. Files that have been indexed can be word-searched by contacts in their repository to find files that contain instances of:

   - All the words entered
   - One or more of the words entered
   - The exact phrase as typed

NOTE: Full-Text Search compatible file types

RB Connect's Full-Text Search plug-in reads:

- PDF (text portion)
- *MS Word*
- *Excel*
- *PowerPoint*
- RTF
- HTML
- All text types, including ASCII *(eTranscript PTX is not text based, so it is not supported.)*

TIP: Remove old index files to save on storage

Full-Text Index files are stored in separately in your repository and incur additional monthly storage fees based on the amount of storage they occupy. Clean out old index files from closed cases or inactive clients periodically to avoid paying unnecessary overhead.

To remove index files, check the box in the header of the Create Full-Text Search window's results pane to select all or check individual repository file boxes. Then click **Remove Full-Text Index.** When the operation is completed, click **OK** in the popup that appears. The repository file remains, but its index file is deleted.

Reference

- Full-Text Search plug-in
- RB Connect
- Date Navigator

Step-by-step instructions

- Looking up cases
- Viewing & updating repository file details

Full-Text Search plug-in

RB9 Standard only

Give clients the ability to search for specific text in specific files in their RB Connect repositories and get results in seconds. When they locate the right file, they can download it.

Requires RB Connect.

RB Connect's Full-Text Search plug-in reads:

- PDF (text portion)
- MS Word
- Excel
- PowerPoint
- RTF
- HTML
- All text types including ASCII (eTranscript PTX is not text based, so it is not supported.)

Reference

- RB Connect
- Create Full-Text Search

Step-by-step instructions

- Creating Full-Text Search

Managing resources' time-off requests

RB9 Standard only

Approve or deny time-off requests made through RB Connect.

1. **Connect > Approve Time-off**
2. In the **Search By** pane, **Status** defaults to Pending. Click to see all outstanding requests. Or restrict results by using other filters before clicking :
   - **Status**

     Default is Pending. Click to search for other request statuses (see Lookup panel).
   - **Resource**

     Default is all resources. To see a single resource's requests, click and find the resource in the **Lookup Resource** panel. See Looking up resources.
   - **Requested Date From/Requested Date To**

     Enter a date or date range to see resource requests for a specific time period. See Date Navigator.
3. RB9 lists all of the time-off requests that meet the specified search condition(s). Click the hyperlinked **Resource** of a request you want to follow up on.
4. In the View Time-off window, click:
   - **Approve** – To grant the resource's request.
   - **Deny** – To turn down the resource's request. Then enter a comment/explanation in ***Reason** in the **Deny Time-Off** panel and click **Save.**
5. RB9 updates the request's **Status,** and notifies the resource via email and in their RB Connect Availability window's **Time-Off** panel.

NOTE: RB9 denies requests if there is a schedule conflict

If you try to approve a resource's time-off request for a time when the resource has already been assigned a task, a warning window appears and does not allow you to approve the request.

TIP: Customize your time-off options

Set a cut-off deadline for requests, select which staff is notified when a request is made, and customize notification emails in Connect > Connect Preferences > Resource-Availability.

Reference

- RB Connect

- Lookup panel
- Date Navigator
- Resource-Availability preferences

Step-by-step instructions

- Looking up resources

Managing billing sheets

RB9 Standard only

Search for billing sheets that resources turned in using RB Connect. View details and download the billing sheets.

1. **Connect > Billing Sheets**
2. In the Billing Sheets window, the default is all tasks turned in today. Change your search criteria with **Search By** filters:
   - **Task Turn-In Date From/Task Turn-In Date To**

     Default is today. Enter a date range, if desired (see Date Navigator).
   - **Job No.**

     The RB9 job number associated with the task turned in.
   - **Task**

     Default is ALL. Click to select one or more categories of tasks. See Lookup panel.
   - **Resource**

     Click to select the resource whose billing sheets you want to review in the Lookup Resource popup. See Looking up resources.
   - **Business Units**

     Profit centers or parts of your business you track separately. Default is ALL. Click to restrict search to the billing sheets for jobs tied to specific BUs. BUs are set in Business Units.
3. Click . RB9 lists all billing sheets that meet the search criteria.
4. Click a hyperlinked **Job No.** to go to its View Billing Sheet window to see details and download files. See Downloading & viewing files.

Reference

- RB Connect
- Date Navigator
- Lookup panel
- Business Units

Step-by-step instructions

- Looking up resources
- Downloading & viewing files

Tracking RB Connect activities

RB9 Standard only

RB9 tracks activities by contacts and resources on RB Connect. The activity log will show you who is using your RB 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**
     - **Contact** – Default. View client-side activity.
     - **Resource** – View resource-side activity.
   - ***Activity Date From/*Activity Date To**
     Required. Defaults to the current month. To change the dates, see Date Navigator.

2. View results

1. Click . RB9 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

- RB Connect
- Date Navigator

Step-by-step instructions

- Using interactive reports
- Exporting & printing results

Resolving support issues

RB9 Standard only

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 ALL and **Status** defaults to Awaiting Response. Click to see all unanswered requests from both clients and resources. Or set search filters to limit results before clicking :

   - **Tickets From**
     - **ALL** – Default. Both contacts and resources' support tickets.
     - **Contact** – Client tickets only.
     - **Resource** – Resource tickets only.
   - **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.
   - **Resource**

     Click ▫ to restrict search to one resource's support tickets. See Looking up resources.

3. RB9 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 & stamps).
4. Click **Send.**
5. RB 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.

Designate which staff person(s) should be notified when **resources** post support tickets in Connect > Connect Preferences > Resource – Support Tickets.

Reference

- RB Connect
- Date Navigator
- Contact – Support Ticket preferences
- Resource – Support Ticket preferences

Step-by-step instructions

- Looking up firms
- Looking up contacts
- Looking up resources
- Customizing emails, messages, web pages & stamps

General Connect preferences

System-wide defaults for RB Connect.

Continued from Customizing global preferences.

- ## License Info
  - ***Site Name**

    The name of the site as you want it to appear in browser tabs and in **Connect Site** drop-downs in RB9.
  - **Contact URL**

    (Uneditable) The web address of the contact side of your RB Connect
  - **Resource URL**

    *(Uneditable)*The web address of the resource side of your RB Connect

- ## Email
  - **Sender's Email**

    The reply email address for your RB Connect comes from the default designated in **Setup > System Preferences > General > Email.** To select a different address for emails from RB Connect, click ▾ and select one from the dropdown. See Email preferences.

- ## Business Units for Contact/Business Units for Resource
  - **To link the contact/resource 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) the contact/resource side should be associated with. See Lookup panel. Click **Save.**

    Normally, you select all of your business units, unless you purchased additional RB Connect licenses connected to the same RB9 database.
  - **To change the default business unit for the contact/resource side:**

    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**

  (Uneditable) List of all RB Connect plug-ins you have

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 job requests. For that reason, it is recommended that you create a dummy business unit called Connect Order and make it the default business unit. Then your calendar staff will make the determination as to which business unit should handle a request.

Reference

- RB Connect
- Email preferences
- Lookup panel
- Business Units

Step-by-step instructions

- Customizing global preferences
- Entering additional contact information
- Entering additional resource information
- Customizing communications

Connect Login preferences

Sign-in preferences for both sides of your RB Connect site (contact and resource).

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 drop-down to allow a set amount of incorrect login attempts before RB Connect locks out the user.

  You can unlock an account in the contact or resource's Entity window's Additional pane. See Entering additional contact information and Entering additional resource information.

  NOTE: Security requires lock-out

  RB 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, then select a number of days in the **Duration (days) for reset password** to require RB Connect users to change their password when the set amount of days has passed.

- **Allow same password as current**

  If you require RB Connect users to change their password periodically, click to select 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 RB9 set users' login names to their email address. If No is selected, users can change their login names.

- **Allow Social Login for Contact**

  Slide to Yes to allow contacts to sign into RB Connect using their *Facebook, Google+, LinkedIn,* or *Microsoft* account.

- **Allow Social Login for Resource**

  Slide to Yes to allow resources to sign into RB Connect using their *Facebook, Google+, LinkedIn,* or *Microsoft* account.

- **Use Two-Factor Authentication**

  Slide to Yes to require users to verify their identity upon RB 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 RB9 users. See Login preferences (RB9).)

  In RB9 & RB Connect, a verification code will be sent to the user's preferred method of communication, which they must then enter into RB9/RB 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

- RB Connect
- Lookup panel
- Two-factor authentication (2FA)
- Login preferences (RB9)

Step-by-step instructions

- Customizing global preferences
- Entering additional contact information
- Entering additional resource information
- Customizing communications
- Verifying your device

Invitation Letter preferences

Email invitations to contacts and resources to use RB Connect and include their login credentials.

Continued from Customizing global preferences.

- **Contact**

  To add or edit invitation letter templates, and choose the default email template for invitation letters to contacts, see Customizing communications.

- **Resource**

  To add or edit invitation letter templates, and choose the default email template for invitation letters to reporters and other resources, 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 RB Connect if you call it something else.

Reference

- RB Connect

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Connect Forgot Password Email preferences

Email instructions for contacts and resources to reset their forgotten passwords.

Continued from Customizing global preferences.

- ## Contact

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts, see Customizing communications.

- ## Resource

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to resources, see Customizing communications.

Reference

- RB Connect

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Branding – Connect preferences

Customize the look and feel for both sides of your RB Connect site (contact and resource).

Continued from Customizing global preferences.

1. Customize contents

- ### General

  This section only appears if you have the RB Connect Mobile plug-in.

  #### *App Title in Web Browser

  Required. Enter text that will appear as the browser header for your RB Connect.

- ### Login Page

  - #### *Login Page Image

    Required. Image that appears on your RB 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 RB Connect login/welcome page. To format the text, see Customizing emails, messages, web pages & stamps.

  - #### Login Page Description for Resource

    Enter text that will appear on your resource RB Connect login/welcome page. To format the text, see Customizing emails, messages, web pages & stamps.

  - #### *Login Page Title for Contact

    Required. Enter text for your contact RB Connect login/welcome page header.

- ***Login Page Title for Resource**

  Required. Enter text for your resource RB Connect login/welcome page header.

- **Login Page Background Color**

  To change the color of your RB Connect login/welcome pages, see Picking colors in RB9.

- **Function Pages**

  - ***Top Logo Image**

    Required. Image that appears at the top of all of your RB 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 RB Connect internal pages, see Picking colors in RB9.

  - **Menu Font Color**

    To change the color of text in the top bar of your RB Connect internal pages, see Picking colors in RB9.

  - **Function Background Color**

    To change the background color of your RB Connect function page headers, see Picking colors in RB9.

  - **Function Font Color**

    To change the color of text in your RB Connect function page headers, see Picking colors in RB9.

  - **Grid Header/Footer Color**

    To change the background color of results grid headers and footers in your RB Connect function pages, see Picking colors in RB9.

- **Section Background Color**

  To change the background color of section headers in your RB Connect function pages, see Picking colors in RB9.

- **Mobile Web**

  This section only appears if you have the RB Connect Mobile plug-in.

  ***App Icon**

  Required. Image that appears in Bookmark of mobile browser and on Home screen when users create an RB Connect shortcut in mobile browsers.

  1. Before uploading, check that your image file conforms to these guidelines:
     - **Logo image format:** PNG
     - **Logo image ratio:** 512 x 512 px
  2. To add your company logo, see Uploading logos for insertion.

2. Preview

RB9 gives you the option to preview your RB Connect pages before your contacts and resources see them.

- In the **Login Page** pane, click **>**
  - **Preview Contact Login Page**

    To preview contact login/welcome page customizations.
  - **Preview Resource Login Page**

    To preview resource 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

- RB Connect
- RB Connect Mobile

Step-by-step instructions

- Customizing global preferences
- Uploading logos for insertion
- Customizing email messages, web pages & stamps
- Picking colors in RB9

Branding – Portal preferences

Customize the look and feel of your RB9 login/welcome page.

Continued from Customizing global preferences.

1. Customize contents

- ### General

  This section only appears if you have the RB Connect Mobile plug-in.

  #### *App Title in Web Browser

  Required. Enter text that will appear as the browser header for your RB9 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 RB Connect.

  - #### *Resource Button Text

    Required. Enter label text for a button your resources click on your Portal page to access RB Connect.

- **Background Color**

  To change the color of your Portal page, see Picking colors in RB9.

2. Preview

RB9 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

- RB Connect Mobile

Step-by-step instructions

- Customizing global preferences
- Uploading logos for insertion
- Customizing email messages, web pages & stamps
- Picking colors in RB9

Contact – Announcement preferences

Give contacts something informative to read after they sign into your RB 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 RB Connect page after contacts sign in. To format the text, see Customizing emails, messages, web pages & stamps.
2. When you are finished, click **Save.**

Reference

- RB Connect

Step-by-step instructions

- Customizing emails, messages, web pages & stamps

Contact – Accessibility preferences

RB9 Standard only

Designate which areas of RB Connect contacts can access.

Continued from Customizing global preferences.

Default is to let contacts access all areas of RB Connect. To choose which RB 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:

- **Jobs**

  Order, cancel or update jobs, request confirmations, view calendar, and upload files.

- **Order Transcript**

  Order copies of transcripts on previously billed jobs.

- **Account Activity**

  View their invoices and pay history, plus pay invoices online.

- **Transcript Packages**

  View and work with bundled transcripts.

- **Repository**

  Download files.

- **Support Tickets**

  Ask questions and get answers from your staff with a paper trail.

Reference

- RB Connect
- Contact – Calendar preferences
- Contact – Order Transcript preferences
- Contact – Account Activity preferences
- Contact – Transcript Packages preferences
- Contact – Repository preferences
- Contact – Support Tickets preferences

Step-by-step instructions

- Customizing global preferences
- Managing users to notify

Contact – My Profile preferences

Preferences for who is alerted when contacts update their personal information in RB Connect.

Continued from Customizing global preferences.

- **Users to notify for changing info**

  To choose which RB9 users are alerted via Notifications and Messages when a contact changes their personal information, see Managing users to notify.

Reference

- RB Connect
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Managing users to notify

Contact – Calendar preferences

Preferences for job ordering, job canceling, and job request updating.

Continued from Customizing global preferences.

- ## General

  - **Allow New Job Request**

    Slide to Yes to allow clients to request jobs online.

  - **Allow Cancel Job Request**

    Slide to Yes to allow clients to cancel jobs online.

  - **Allow Change Job Request**

    Slide to Yes to allow clients to update jobs online.

  - **Do not allow new job request within this number of days.**

    (Weekends are excluded)

    If **Allow New Job Request** is set to Yes, you can select a cut-off number of days for clients requesting jobs online.

    - **0** – To accept requests no matter when.
    - **-1** – To allow contacts to add the current date's job.

  - **Do not allow cancel job request within this number of days.**

    (Weekends are excluded)

    If **Allow Cancel Job Request** is set to Yes, you can select a cut-off number of days for clients canceling jobs online. Enter 0 to accept requests no matter when.

  - **Do not allow change job request within this number of days.**

    (Weekends are excluded)

    If **Allow Change Job Request** is set to Yes, you can select a cut-off number of days for clients updating job requests online. Enter 0 to accept requests no matter when.

- ## Users to notify

  To choose which RB9 users are alerted via Notifications and Messages when a contact requests a job, cancels a job, or changes a job, see Managing users to notify.

- ## New Job
  - ### *Business Unit

    Select the default business unit that new jobs requested through RB Connect will be associated with.

  - ### Checked items will appear on new job screen

    Slide to Yes for field(s) that contacts can fill out when requesting new jobs via RB Connect.
    - **Witness** – Deposed's name
    - **Subpoenaed Witness** – Witness was summoned to appear
    - **Export Type** – Witness's expertise. Types of witness expertise are set in Lists > Jobs.
    - **Job Type** – Category of jobs requested by clients. Job types are set in Lists > Jobs.
    - **Case Name** – Name used in RB9 to identify case
    - **Case No.** – Case number
    - **Specialties** – Specific expertise/skills required for job
    - **Request Services** – Services requested by a contact for a case or job that are not included in their standing requests
    - **Direct Billing Notes** – If the Bill To client will be different from the Sold To client, any text entered here appears on the invoice along with Claim No., Name of Insured, and Date of Loss
    - **Client Matter No.** – 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 RB9
    - **Claim No.** – Insurance claim number
    - **Name of Insured** – Insured individual's name
    - **Date of Loss** – Date of incident

- ## Custom Section in New Job

  To add custom fields to new job requests, see Adding custom sections to online forms.

- ## New Job Notification
  - ### Send Notification for New Job

    Slide to Yes if you want RB9 to automatically acknowledge a new job request. ***Email Subject** and ***Email Message** fields appear.

- To customize ***Email Subject** and ***Email Message** *(both required)* for new job notifications, see Customizing communications.

- ## Request Confirm Job Notification

  - ### Send Notification for Request Confirm Job

    Slide to Yes if you want RB9 to automatically send a confirm job request email. ***Email Subject** and ***Email Message** fields appear.

  - To customize ***Email Subject** and ***Email Message** *(both required)* for job confirmations, see Customizing communications.

- ## Request Cancel Job Notification

  - Slide to Yes if you want RB9 to automatically send a cancel job request confirmation email. ***Email Subject** and ***Email Message** fields appear.
  - To customize ***Email Subject** and ***Email Message** *(both required)* for job cancellations, see Customizing communications.

Reference

- RB Connect
- Notifications and Messages
- Business unit
- Jobs lists
- Sold To vs. Bill To

Step-by-step instructions

- Customizing global preferences
- Managing users to notify
- Adding custom sections to online forms
- Customizing communications

Contact – Order Transcript preferences

Preferences for contacts ordering transcripts on previously billed jobs.

Continued from Customizing global preferences.

- **Users to notify**
  To choose which RB9 users are alerted via Notifications and Messages when a contact orders a transcript, see Managing users to notify.

- **Custom Section**
  To add custom fields to transcript orders, see Adding custom sections to online forms.

Reference

- RB Connect
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Managing users to notify
- Adding custom sections to online forms

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.

  - ### Show Begin and End Page No.

    If you want to show beginning and ending page numbers of billed transcripts in additional to total number of pages, slide to Yes.

- ## Online Payment

  For e-commerce, RB Connect integrates with several online payment processing services. If you want to offer online payment of invoices, including COD invoices, through RB 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** drop-down:

  - **Do not use** – Default.
  - **PayPal** – Easy to set up and integrate with RB9. 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.
  - **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.

- **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 RB9 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 communications.

Reference

- Sold To vs. Bill To
- COD invoices
- RB 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 communications

Setting up a PayPal business account

Before your clients can pay invoices online in RB9, you must set up a business account with one of the accepted online payment processing services and enter your credentials in RB9. Follow these instructions to set up a PayPal business account and enter your credentials in RB9.

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 RB9 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 RB9, 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 drop-down.
   - ***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 RB9 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

- RB Connect
- PayPal
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- 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

Setting up an Authorize.net business account

Before your clients can pay invoices online through RB Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in RB9. Follow these instructions to set up an Authorize.net business account and enter your credentials in RB9.

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 RB9 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 RB9, 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 drop-down.
    - ***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

- RB Connect
- Account Activity preferences
- Payment gateway

Step-by-step instructions

- Setting up a PayPal business account
- Setting up a Clover business account
- Setting up a Square business account
- Setting up a Stripe business account

Setting up a Clover business account

Before your clients can pay invoices online through RB Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in RB9. Follow these instructions to set up a Clover business account and enter your credentials in RB9.

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 RB9 before you can accept payments online. For more detailed instructions, see https://docs.clover.com/dev/docs/gdp-create-global-developer-account.

1. Set 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

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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 RB Connect Preferences.

4. **Enter your credentials in RB9**

    1. In RB9, 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 drop-down.
        - ***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

- RB 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 RB Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in RB9. Follow these instructions to set up a Square business account and enter your credentials in RB9.

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 RB9 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 RB9, 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 drop-down.
    - ***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

- RB 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 Clover business account
- Setting up a Stripe business account

Setting up a Stripe business account

Before your clients can pay invoices online through RB Connect, you must set up a business account with one of the accepted online payment processing services and enter your credentials in RB9. Follow these instructions to set up a Stripe business account and enter your credentials in RB9.

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 RB9 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 RB9 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 RB9. Keep your Stripe dashboard open.

3. ## Enter your credentials in RB9

    1. In RB9, 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 drop-down.
        - ***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 RB9.

            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

- RB 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 Clover 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 RB 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

- RB Connect
- Contact – 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 RB9. 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

- RB Connect
- Contact – Account Activity preferences
- Payment gateway

Step-by-step instructions

- Setting up a PayPal business account

Contact – Transcript Packages preferences

RB9 Standard only

Options for customizing Transcript Packages and email notifications to contacts about Transcript Packages.

Continued from Customizing global preferences.

1. Select a transcript profile in the ***PDF Transcript Preferences for Exporting** drop-down *(required)* for the appearance and other options of transcripts contacts export from their Transcript Packages. See Setting global RB-PDF Transcript preferences.
2. To customize ***Notification Email Subject** and ***Notification Email Message** *(both required)* for emails to contacts about new Transcript Package uploads, see Customizing communications.
3. When you are finished, click **Save.**

Reference

- RB Connect
- Transcript Packages

Step-by-step instructions

- Customizing global preferences
- Setting global RB-PDF Transcript preferences
- Customizing communications

Contact – Repository preferences

Set preferences for repository access and notifications.

Continued from Customizing global preferences.

- **Case-level Notification**

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about file uploads to case repositories, see Customizing communications.

- **Job-level Notification**

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about file uploads to job repositories, see Customizing communications.

- **Witness-level Notification**

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about file uploads to witness repositories, see Customizing communications.

- **Invoice-level Notification**

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about file uploads to invoice repositories, see Customizing communications.

- **Users to notify**

  To choose which RB9 users are alerted via Notifications and Messages when you send repository notifications to clients, see Managing users to notify.

- **Others**

  - **Allow file downloads when the original invoice is fully paid**

    Slide to Yes to prevent contacts from accessing transcripts before you receive payment in full for original invoices.

  - **Allow file downloads when the copy invoice is fully paid**

    Slide to Yes to prevent contacts from accessing transcripts before you receive payment in full for copy invoices.

Reference

- RB Connect
- Repository
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Contact – Reward Points preferences

RB9 Standard only

Designate who is notified when contacts request point redemptions.

Continued from Customizing global preferences.

To choose which RB9 users are alerted via Notifications and Messages when a contact wants to redeem reward points, see Managing users to notify.

Reference

- RB 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 RB9 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 RB Connect to see your reply. To customize ***Email Subject** and ***Email Message** *(both required)* for emails to contacts about support tickets, see Customizing communications.

- **Users to notify**
  To choose which RB9 users are alerted via Notifications and Messages when a contact submits a support ticket, see Managing users to notify.

Reference

- RB Connect
- Notifications and Messages
- Support tickets

Step-by-step instructions

- Customizing communications
- Managing users to notify

Resource – Announcement preferences

Give resources something informative to read after they sign into your RB Connect site. Use this feature to tell resources news about your company, how to use the site, and other relevant information. Update information as often as you like.

Continued from Customizing global preferences.

1. Enter text that will appear on the main RB Connect page after resources sign in. To format the text, see Customizing emails, messages, web pages & stamps.
2. When you are finished, click **Save.**

Reference

- RB Connect

Step-by-step instructions

- Customizing emails, messages, web pages & stamps

Resource – Accessibility preferences

Designate which areas of RB Connect resources can access.

Continued from Customizing global preferences.

Default is to let resources access all areas of RB Connect. To choose which RB Connect resources can use online, check **Access** of functions they can use and uncheck functions you want to hide from resources.

If the function is checked, resources can:

- **Jobs**

  View their job calendar, accept jobs, view job details, and download files.

- **Tasks in Progress**

  View their outstanding jobs and begin turn-in process.

- **Turn In**

  Submit finished jobs to your office online with witness information, parties and services ordered, transcript and exhibit files

- **Account Activity**

  See which invoices are included in their next pay check or outstanding.

- **Pay Statement**

  View and print current and past payroll reports.

- **Repository**

  Download files.

- **Master Word List**

  Compile a Master Word List for any or all ASCIIs belonging to the same case.

- **Availability**

  View assigned job times, open time slots and time off. Make online requests for time off andmonitor the status of requests.

- **Firms**

  Look up information about firms in your database, such as basic contact information, driving directions to the firm, contacts at a firm and their email addresses.

- **Support Tickets**

  Ask questions and get answers from your staff with a paper trail.

Reference

- RB Connect
- Resource – Announcements preferences
- Resource – Jobs preferences
- Resource – Turn In preferences
- Resource – Repository preferences
- Resource – Master Word List preferences
- Resource – Availability preferences
- Resource – Firms preferences
- Resource – Support Tickets preferences

Step-by-step instructions

- Customizing global preferences

Resource – My Profile preferences

Preferences for who is alerted when resources update their personal information in RB Connect.

Continued from Customizing global preferences.

- **Users to notify for changing info**

  To choose which RB9 users are alerted via Notifications and Messages when a resource changes their personal information, see Managing users to notify.

Reference

- RB Connect
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Managing users to notify

Resource – Firms preferences

Preferences for resources' access to firms information.

Continued from Customizing global preferences.

Check the **Show firm's COD** box to allow resources to see firms' COD status in RB Connect.

Reference

- RB Connect

Step-by-step instructions

- Customizing global preferences

Resource – Jobs preferences

Preferences for worksheet forms and who to notify of Client Of assignment requests.

Continued from Customizing global preferences.

- ## General
  - ### *Printable Assignment Notification

    Click to select which form is used for assignment notifications that are exportable/printable from the Jobs calendar. In the **Printable Assignment Notification** panel, select a **Form Group** in the drop-down, then click the hyperlinked **Form** name in the list.
  - ### Show only notified tasks for future tasks

    Slide to Yes so resources do not see tasks in their RB Connect before they have received notification that they have been assigned to those tasks.
  - ### Show Previous Resources

    Slide to Yes so resources can see who was assigned to other jobs related to a case, when they access a job through their job calendar.
  - ### Show Related Files

    Slide to Yes so resources can download additional files related to a case, when they access a job through their job calendar or the repository.
  - ### Resources can manage Task Status

    Slide to Yes so resources can update a task's status from RB Connect.
- ## Users to notify

  To choose which RB9 users (e.g., a manager) are alerted via Notifications and Messages when resources request job assignments coming from their clients (Client of contacts), see Managing users to notify.

NOTE: Resources can request jobs online from their own contacts only

Resources can only see Client Of contacts, not firms, in their RB Connect calendar for requesting assignments.

TIP: Designating Client Of contacts quickly

If all of a firm's contacts belong to one resource, designate the resource as the firm's Client Of resource first (see Entering firm marketing information), then create contacts for the firm, who will automatically inherit the firm's Client Of resource. If contacts were entered prior to designating a resource as Client Of on the firm level, enter the resource

in each contact's **Marketing** pane (see Entering contact marketing information), or use Bulk Update to add the resource to multiple contacts at once (see Updating multiple contacts at once).

Reference

- RB Connect
- Task
- Notifications and Messages
- Client Of
- Bulk Update

Step-by-step instructions

- Customizing global preferences
- Managing users to notify
- Entering firm marketing information
- Entering contact marketing information
- Updating multiple contacts at once

Resource – Turn In preferences

RB9 Standard only

Preferences for resources turning in jobs online.

Continued from Customizing global preferences.

- ## General
  - ### Checked items will appear on Turn In screen

    Slide to Yes for field(s) that resources can fill out when turning in jobs via RB Connect:

    - **Edit Case** – Resource can correct case name and other case details.
    - **Read & Sign, Read & Sign Date** – If read & sign applies to a witness being deposed, the resource can indicate they have completed the requirement and include the date.
    - **Add New Firms and Contacts** – Resource can enter firm and contact information for attending and ordering clients into your RB9 database.
    - **Prefill Parties** – Resource can add parties already in your RB9 database from the job, case or previous turn-ins, instead of manually entering information.
    - **Add Attendance (non-ordering clients)** – Resource can enter names and other details about parties who attended the deposition but did not order copies of transcripts at the time.

    #### NOTE: Information entered in these fields is entered directly into RB9

    If you do not want resources to enter information into your RB9 system because they might duplicate existing firms or contacts, for instance, or otherwise enter errors into your database, do not check these items.

    #### TIP: Market transcripts to attending parties

    Encourage your resources to add attending parties to their turned-in jobs. You can contact these non-ordering parties later to see if they would like to order copies. Give them their own RB Connect IDs and passwords so they can purchase copies online.

- ## Users to notify

  To choose which RB9 users (e.g., the production manager) are alerted via Notifications and Messages when a resource turns in a completed task, see Managing users to notify.

- ## Options
  - To allow resources to add automatically numbered stamps to PDF exhibits when turning in jobs online, slide to Yes in **Add Exhibit Stamp.** See Exhibit Stamps. You can decide in Setup > Exhibit Stamps which stamps resources can use when turning in jobs via RB Connect.
  - When a resource adds a new firm or contact during Turn In, check the **Send a notification when a new firm or contact is created** box so designated RB9 users will receive notification messages.

- ## Custom Section in Job

  To add custom fields to job turn-in information, see Adding custom sections to online forms.

- ## Custom Section in Witness

  To add custom fields to witness turn-in information, see Adding custom sections to online forms.

Reference

- RB Connect
- Prefill
- Notifications and Messages
- Exhibit Stamps

Step-by-step instructions

- Customizing global preferences
- Managing users to notify
- Adding custom sections to online forms

Resource – Master Word List preferences

RB9 Standard only

Preferences for the default appearance of resources' master word lists.

Continued from Customizing global preferences.

To choose a default PDF transcript profile for master word lists created by resources, select one from the ***PDF Transcript Preferences for Master Word List** drop-down. PDF transcript profiles are created in Setup > PDF Transcript Preferences.

Reference

- RB Connect
- RB-PDF Transcript
- Master Word List
- PDF Transcript Preferences

Step-by-step instructions

- Creating master word lists

Resource – Repository preferences

Preferences for resources' repository notifications.

Continued from Customizing global preferences.

To choose which RB9 users are alerted via Notifications and Messages when a resource uploads to the repository, see Managing users to notify.

Reference

- RB Connect
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Managing users to notify

Resource – Availability preferences

Preferences for resources' time-off requests.

Continued from Customizing global preferences.

- ## General
  - **Do not allow time-off request within the number of days.**

    (Weekends are excluded)

    Select a number in the drop-down for the minimum time-period between a resource's time-off request and the start of their time off.

- ## Users to notify

  To choose which RB9 users are alerted via Notifications and Messages when a resource requests time off, see Managing users to notify.

- ## Approval Notification

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to resources about time-off approvals, see Customizing communications.

- ## Denial Notification

  To customize ***Email Subject** and ***Email Message** *(both required)* for emails to resources about time-off denials, see Customizing communications.

Reference

- RB Connect
- Notifications and Messages

Step-by-step instructions

- Customizing global preferences
- Managing users to notify
- Customizing communications

Resource – Support Tickets preferences

Set preferences for support ticket notifications.

Continued from Customizing global preferences.

- **Ticket Notification**
  Enter text and RB9 data fields to alert resources 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 resource does not have to go to RB Connect to see your reply. To customize ***Email Subject** and ***Email Message** *(both required)* for emails to resources about support tickets, see Customizing communications.

- **Users to notify**
  To choose which RB9 users are alerted via Notifications and Messages when a resource submits a support ticket, see Managing users to notify.

Reference

- RB Connect
- Notifications and Messages
- Support tickets

Step-by-step instructions

- Customizing global preferences
- Customizing communications
- Managing users to notify

Adding custom sections to online forms

Get additional information from contacts and resources when they submit requests or turn in jobs via RB Connect with custom sections.

Continued from Contact – Order Transcript preferences or Resource – Turn In preferences.

- **To add a section for your own data fields:**

  In Resource – Turn In only: Slide **Use Custom Section...** to Yes.

- **To add a custom data field:**

  1. Click + in the **Custom Section...** pane.
  2. In the **New Custom Field** panel, select the type of field you are adding in the **Data Type** drop-down. Depending on the type selected, other options appear in the panel:
     - ***Field Name**
       Required. Enter a label for the field.
     - **Required**
       If users must enter something in this field before their request can be processed, slide to Yes.
     - **List Data**
       List only
       To add your own lists to RB Connect forms, see Creating custom lists.
     - ***Default**
       Yes/No drop-down & List only
       Required. Select which option will be visible first.
     - **Instruction**
       Enter brief directions that will appear with the new field.
  3. Click **Save >**
     - **Save & New:** To save the field and add more fields.
     - **Save & Close**: When you have no more fields to add.

- **To re-order the data fields:**

  Click ⇈ or ⇊ next to a field to move it up or down in the list.

- **To edit a data field:**
  Check the data field's hyperlinked **Field Name.**

- **To remove a data field:**

  Check the data field's box in the list, then click . Click **Yes** in the popup.

Reference

- RB Connect
- Contact – Order Transcript preferences
- Resource – Turn In preferences

Step-by-step instructions

- Customizing global preferences
- Customizing communications

Creating custom lists

Include your own lists in custom sections of RB Connect.

Continued from Adding custom sections to online forms.

1. In the **List Data** pane of a **New Custom Field** panel, click .
2. In the **New List** panel, enter a list entry in ***List** *(required).*
3. Click **Save >**
   - **Save & New:** To save the list entry and add more entries.
   - **Save & Close**: When you have no more list entries to add.
4. **To change the order** of how entries will appear in the list, click or next to an entry to move it up or down in the list.
5. **To delete an entry,** check its box in the list, then click . Click **Yes** in the popup that appears.

Reference

- RB Connect
- Contact – Calendar preferences
- Contact – Order Transcript preferences
- Resource – Turn In preferences

Step-by-step instructions

- Customizing global preferences

Managing users to notify

Select which RB9 users get automatic notices via Notifications and Messages when a request is made through RB Connect or when a reporter submits their Signature Proxy ID and password from ReporterBase.net.

Continued from Signature Proxy preferences, Contact – Calendar preferences, Contact – Order Transcript preferences, Contact – Account Activity preferences, Contact – Reward Points preferences, Contact – Support Tickets preferences, Resource – Jobs preferences, Resource – Turn In preferences, Resource – Repository preferences, or Resource – 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 RB9 user(s) to be notified. See Lookup panel.

   NOTE: Alert users to turn-in of specific tasks

   In Resource – Turn In, you can designate which users will be notified per task type. In the **Add Users by Task** panel, select a task type in the **Task** dropdown, then check the box(es) of the user(s) who will receive notifications when that type of task is turned in. If **Task** is not specified, then the selected users will receive notifications when any type of task is turned in via RB Connect.
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
- RB Connect
- RB-PDF Transcripts
- RB Digital Signature Proxy
- ReporterBase.net
- Lookup panel

Step-by-step instructions

- Customizing global preferences
- Communicating within RB9
- Customizing communications

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 resources 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

- Five basic accounts
- 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 RB9 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.

Double-entry examples

Reference

- Five basic accounts
- The accounting equation
- Debits and credits
- 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 RB9 functions are organized into menus at the top of the RB9 web page, grouped by module. Functions are accessible by clicking next to module names.

- **Calendar**

  Manage cases, jobs, and tasks.

- **Production**

  Turn in jobs, send out letters and originals. Generate PDF transcripts, track jobs, print labels, ship orders. Store files.

- **Billing**

  Invoice jobs and perform other billing tasks, such as exporting invoices for e-billing and transferring invoices.

- **Inquiry**

  Find information in your RB9 database using preset searches.

- **Receivables**

  Credit and track receivables in RB9 — plus assess finance charges, print monthly reports, and monitor collection efforts.

- **Payables**

  Handle payroll tasks and generate forms and reports, such as 1099s for resources. Cut paychecks or delegate pay to direct deposit.

- **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; view email logs; review merge history of cases and entities; use custom database queries; and integrate financials with *QuickBooks.*

- **Entities**

  Manage clients, resources, locations, and your business's profit centers.

- **Setup**

  Customize RB9 to fit your business.

- **Connect**

  Manage your RB Connect plug-in that gives clients, third parties, and resources access to your office through the internet and on mobile devices.

- **Help**

  Access contextual help on every screen.

- **Personal**

  Customize RB9 for your personal work environment, handle messages, access locked data, update your password, and log out.

Reference

- Function layout
- Accounts receivable

Logging into RB9

You can use RB9 anywhere you have internet access through a browser. All you need is your company's RB9 URL plus your user email and password — or a social media account.

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 RB9?

Before you log into RB9, 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 RB9 URL. If you have RB Connect, click on the Portal page. Otherwise, be sure to enter the subpath "/office" at the end of your RB9 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 RB9 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 RB9 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 RB9 web page appears.

4. Next time you visit the RB9 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: RB9 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 RB9 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 RB9. 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 RB9 setup), but you can change your password at any time.

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

When RB9 updates, a list of what has changed automatically appears on the main RB9 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 RB9 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 RB9 updates

Verifying your device

If you are signing into RB9 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 RB9 using two-factor authentication (2FA).

Continued from Logging into RB9.

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 RB9.
3. Paste the code in RB9'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 RB9 web page appears.

IMPORTANT: Do you trust this device?

If you use RB9 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 a trusted browser and RB9 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 RB9

Function layout

Functions are laid out in windows, which are divided into panes, with supplemental options in fly-out panels.

- ## Windows

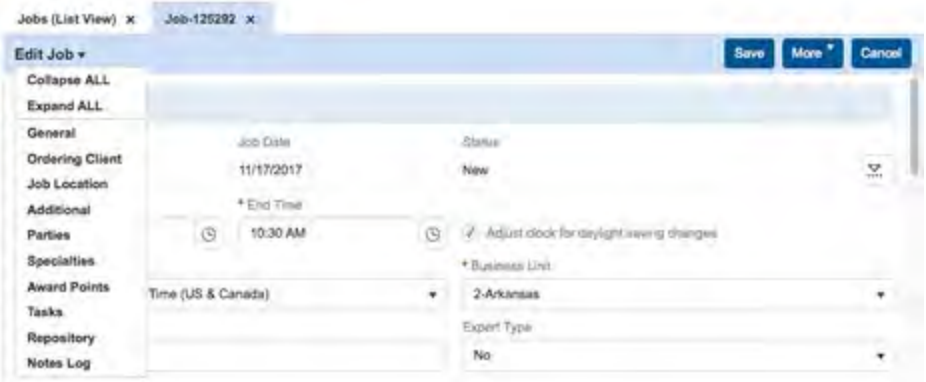
  When you select a function, it opens in the main browser window with a labeled tab at the top. If you open additional functions in this window, they will overlay the existing functions and their labeled tabs will appear at the top of the window.

  - Switch to any open function by clicking its tab.
  - Close a function window by clicking its tab label's X or clicking **Close.**

- ## Panes

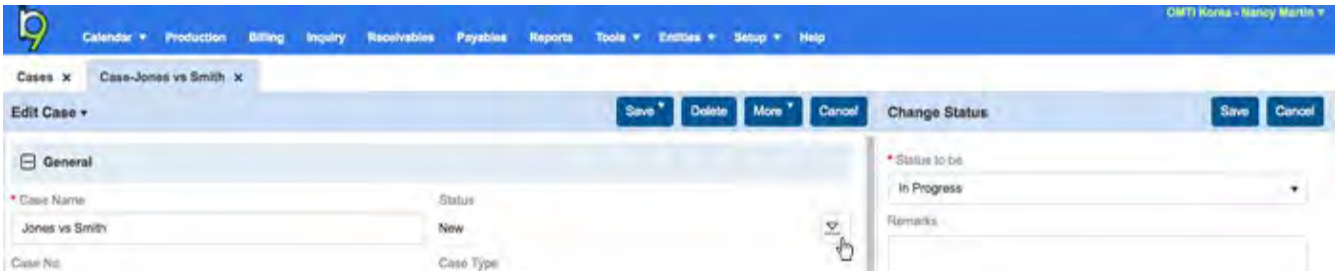
  Different aspects of each function appear in their own panes in the function's main browser window. The default view of any function displays all of its related panes.

  - 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.



- ## 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 RB9 — 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 RB9 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 drop-down, 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

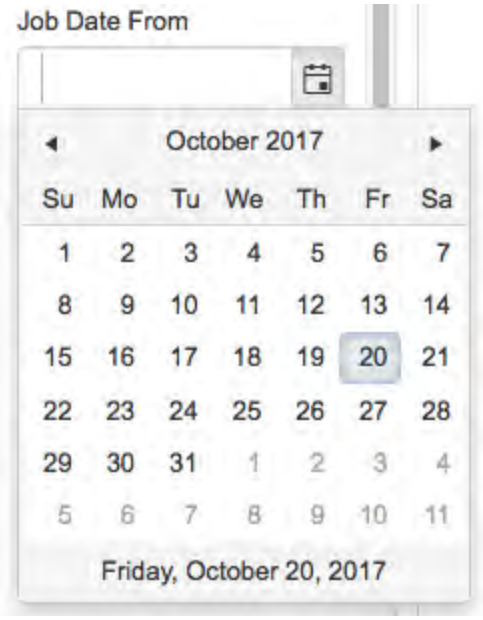
- Modules & functions
- Lookup panel

Step-by-step instructions

- Searching in RB9
- Sorting rows
- Customizing grids
- Entering dates
- Accessing results
- Exporting & printing RB9 results

Date Navigator

Every date field in RB9 has a perpetual calendar, called **Date Navigator,** accessed by clicking 📅. It provides a quick and easy way to add or change dates.



Reference

- Search By pane

Step-by-step instructions

- Entering dates

Mail Composer

RB9's email app for sending RB9 information electronically, plus files and your own messages.

Step-by-step instructions

- Emailing & texting from RB9
- Composing emails & text messages

Credit Memo

A **credit memo** reduces the balance of an invoice.

Step-by-step instructions

- Issuing credit memos

Data Reader

RB9 Standard only

If RB9 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 RB9 databases in the cloud. Data Reader creates a dedicated connection to your RB9 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

Importing credits & journal entries into *QuickBooks*

RB9 Standard only

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 RB9. 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 drop-down.
   - ***Post Date From/Post Date To**
     Required. Default is today. Enter the date or date range (up tp 7 days) transactions were posted.
4. Click . RB9 lists all of the transactions other than payments that posted on the specified date.
5. Check the box in the header to select all of the transactions displayed or check individual boxes to select specific 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

- QuickBooks preferences

Step-by-step instructions

- Preparing to use *QuickBooks Desktop* with RB9
- Importing entities into *QuickBooks*
- Importing invoices into *QuickBooks*
- Importing payments into *QuickBooks*
- Importing resource payroll checks into *QuickBooks*

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

Step-by-step instructions

- Setting up business units

Selecting BU financial accounts

Designate which accounts RB9 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 drop-down to match your general ledger or accounting software. (RB9 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 RB9 data directly into your *QuickBooks* using QuickBooks Integrator *(RB9 Standard only)*, eliminating the need to re-key financial data. Before importing RB9 invoices and payments into *QuickBooks,* set up your RB9 business units' accounts to match your *QuickBooks* setup.

IMPORTANT: Set up accounts required for processing credit card fees in RB9

Before you can separate out credit card processing fees in RB9, 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 up in Lists > Accounting > Account Type.

Reference

- Chart of Accounts
- QuickBooks Integrator
- Accounting lists

Step-by-step instructions

- Customizing accounts

Publishing COD invoices

RB9 Standard only

By default, COD invoices cannot be published to RB Connect. If you would like to give a client the ability to pay for a COD invoice online, you can manually publish it to RB Connect. After paying, the client can then download the associated transcript.

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 billing information to invoices.)

2. In the Publish COD Invoices window's **Search By** pane, click to see all outstanding COD invoices, or select some 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 (see Date Navigator).

   - **Case**

     Case related to the COD invoice. See Looking up cases.

   - **Bill To Firm**

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

   - **Job No.**

     Job number related to the COD invoice.

   - **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). BUs are set in Business Units.

3. In the search results, check the box(es) next to the invoice(s) to select then, 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 RB Connect.

   - **Clear Publish to Connect** – The invoice's **Publish to Connect** column will be

unchecked, and the invoice will be removed from client's RB Connect.

4. Click **OK** in the popup that appears when the operation is finished.

NOTE: Set up your online payment processing to work in RB9

Before your clients can pay invoices online in RB9, 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

- RB Connect
- COD invoices
- Turn In
- Date Navigator
- Lookup panel
- Business Units
- Contact – Account Activity preferences
- PayPal
- Payment gateway

Step-by-step instructions

- Adding billing information to invoices
- Looking up cases
- Looking up firms
- Setting up a PayPal business account

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 RB9 Standard or RB9 Lite.
  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 RB9 Standard/RB9 Lite, click **Help** in the header of the function window.

- **OMTI website**

  To access the user guide outside RB9 Standard/RB9 Lite, visit omti.com.

- **PDF version**

  Visit the Downloads page of the ReporterBase side of omti.com.

Viewing RB9 updates

View what was included in every RB9 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. RB9 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 RB9 questions

Locate and read articles about different aspects of your RB9 system organized by the main areas of RB9 and RB 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, RB9 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. In the **Email** panel, the ***From** field is automatically populated with the default email address from your user preferences (see Setting personal preferences). Change the address if desired.
6. Enter the recipient's address in ***To.**
7. The title of the KB article auto-populates ***Subject.** Edit the email's subject line if desired.
8. In **Message,** the complete article appears along with the email signature from your user preferences. Edit the message if desired.
9. Click **Send.**
10. Click **Close.**

Step-by-step instructions

- Setting personal preferences

Online Support

When needed, OMTI support staff can remotely view what is happening on your screen and solve problems in your RB9 using one of our remote control apps.

Reference

- Team Viewer

Step-by-step instructions

- Using Team Viewer

Using Team Viewer

Team Viewer is an executable file that allows OMTI support technicians to remotely view and control your device to solve RB9 issues.

1. If you need our help resolving an issue with RB9, 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 RB9 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 RB9, 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, & stamps.
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, & stamps
- Closing tickets

Searching ideas

Find out what other RB9 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 RB9 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 RB9.
     - **New** – Suggestion has been submitted.
     - **Resolved** – Suggestion has been implemented in RB9.
     - **Rejected** – Suggestion will not be implemented in RB9.
     - **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 RB9 and RB Connect. Default is ALL. Click to select a single module.

   - **Function**

     Activities in RB9 and RB 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. RB9 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

Commenting on and voting for ideas

Add your input on ideas other RB9 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, & stamps.
6. To vote for the idea, slide **I like this idea** to Yesbefore submitting your comment to the thread.
7. Click **Save.** Your comment is saved and appears in the **Threads** pane under the suggestion. RB9 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, & stamps

Suggesting ideas

When you have an idea for improving RB9, you can submit it directly to OMTI's development team from within RB9. This way you have a record of your suggestion and its development status — plus other RB9 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 RB Connect or RB9 that your idea applies to.
5. After selecting the module, click ***Function** ▾ to select the specific RB9 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 emails, messages, web pages, & stamps.

     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, & stamps

LastPass

LastPass (https://www.lastpass.com/) is a cloud-based password manager. You can store all of your user names, passwords, and other information so you only need to remember one master password to access secure websites.

Step-by-step instructions

- Logging into RB9

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 RB9, 2FA uses a verification code that is sent to the user's email address or mobile device, which the user then enters into RB9 during sign-in to confirm their identity.

Reference

- Login preferences (RB9)

Step-by-step instructions

- Logging into RB9
- Verifying your device

Lookup panel

Some sub-functions or panes within windows have their own search capability called Lookup. When you click next to a field in RB9, a Lookup panel appears. Depending on the field, the Lookup panel's search function is:

- **Lookup list**

  List of search 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 drop-down.
  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 drop-down 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 cases, Looking up contacts, Looking up firms, Looking up locations, and Looking up resources.

  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 RB9
- Looking up cases
- Looking up contacts
- Looking up firms
- Looking up locations
- Looking up resources

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. RB9 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.

- ### Group results

  If the results grid allows grouping, you can divide the rows into groups you designate. See Grouping results.

Reference

- Results pane

Step-by-step instructions

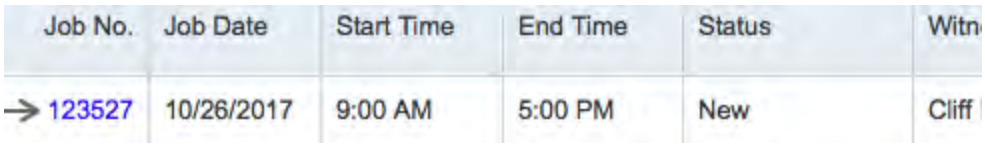
- Customizing grids
- Grouping results

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 Jobs (List View) options for sending job confirmations and changing the status of a job are available as shortcuts.

Reference

- Results pane
- Jobs (List View)

Exporting & printing results

While you can use your browser's print function to print screens from RB9, use RB9'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.

  RB9 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, RB9 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

RB9-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

Search By pane

Most main functions in RB9 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: RB9 finds exact and similar possible text matches

  RB9 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" RB9 would include entries such as "Angela J. Smith" and "Angela Wurtsmith" because RB9 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 RB9 table, enter 3 percentage signs (%%%) in a text field filter for that table.

- **Dropdown lists**

  RB9 displays a default option. Click the field's ▾ to select a different option in the drop-down.

- **Date Navigator**

  Click a date field's to set a date using RB9'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.

Results pane

When you search for information in RB9, 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.

- **Grouped results**

  If a custom grid layout has a grouping zone, you can organize the grid rows into groups you designate to make it easier to see relevant related information in complicated results grids.

  Depending on the function, the default grid might already group information by one of its parameters. In layouts that allow grouping, you can set up one or more criteria to group by, arrange the grouping order, and delete any grouping criteria. See Grouping results.

- **Interactive reports**

  Unlike most results grids in RB9, 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 drop-down 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 RB9 is better in a format that is print friendly first, generally information that you are distributing to third parties, such as clients, resources, and your accountant. This information is formatted in RB9 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 RB9. 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
- Grouping results
- Using interactive reports
- Printing invoices, statements & reports
- Sorting rows
- Resizing columns
- Accessing results
- Exporting & printing results
- Searching in RB9

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

Emailing & texting from RB9

You can email and/or text contacts, resources, locations, and other RB9 users from within RB9. Customize the email and text contents and include email attachments. Send individual emails/texts or send them in batches.

Continued from Confirming single jobs, Rescheduling jobs, Canceling jobs, Sending job confirmations or cancellations, Sending clients their job calendars, Notifying resources individually, Sending batch assignment notifications/cancellations, 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, Sending invitations to reporters, Sending resources their pay statements, Verifying resource pay, or Sending invitations.

1. Compose email/text

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 & text messages.
- **Send from a different address:** Select an address in the **From / Email/SMS From** drop-down if you don't want to send the email/text from default address shown. (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.)
- **Use a different SMS template:** Select a different template for the text messages from the default by selecting one in the **SMS Template** dropdown. (SMS 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 & text messages.

2. If an "operation successful" popup appears, click **OK.** If sending emails from a results grid, RB9 will post a status message, "Email sent successfully," in the Result column.

NOTE: RB9 is not an email program

RB9 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 *(RB9 Standard only)*.

If you want to keep copies of all of your emails sent from RB9, enter your email address in the **Bcc Emails** field in your personal User Preferences window's **Email** pane. (See Customizing email preferences.)

Reference

- General Email preferences
- Form Templates
- Send Job Confirmation/Cancellation
- Send Assignment Notification/Cancellation
- Send Invoices
- Invoice Inquiry
- User Preferences

Step-by-step instructions

- Confirming single jobs
- Rescheduling jobs
- Canceling jobs
- Sending job confirmations or cancellations
- Sending clients their job calendars
- Notifying resources individually
- Sending batch assignment notifications/cancellations
- 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
- Sending invitations to reporters
- Sending resources their pay statements

- Verifying resource pay
- Sending invitations
- Managing notification emails
- Customizing emails, messages, web pages & stamps
- Customizing communications
- Creating/updating forms & letters
- Viewing email logs

Composing emails & text messages

Add/edit email and SMS contents and include email attachments in RB9's mail composer.

Continued from Emailing & texting from RB9, Entering general contact information, Entering general location information, Entering general resource information, Alerting clients, Viewing client activity, Finding overdue invoices, Sending collection letters, Sending letters to contacts, Sending letters to witnesses, Sending letters to others, Entering general witness information, Updating witnesses, Finding network members, and Managing tags.

1. Compose email

If you are sending an email, you can change these options or use the defaults in the **Email** or **Email/SMS** panel/popup:

- ***From / *Email/SMS 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 the default are set in System Preferences > General > Email.)

- ***Email Template**

  Your default email template appears. To use a different template for the email from the default, select one in the dropdown. (Email templates and the default are set in System Preferences. See Customizing communications.)

- ***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 the email address.

- ***Email 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.)*

- ***Email 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 & stamps.

NOTE: Customize form letters

If you are sending an email based on a pre-set RB9 message or an RB9 template (such as job confirmations), 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. Compose text message

If you are sending text messages, you can update these options or use the defaults:

- ***SMS Template**

  Your default SMS template appears. To use a different template for the text message from the default, select one in the dropdown. (SMS templates and the default are set in System Preferences. See Customizing communications.)

- ***SMS Subject**

  Required. Enter or edit the text that will appear in the text message's subject line if needed.

- ***SMS Message**

  Required. Enter or edit the text that will appear as the body of the message if needed.

3. Set options

Depending on the function, you might have one or more of these 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:
  - Send Job Confirmation/Cancellation
  - Send Assignment Notification/Cancellation
  - 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.

4. Send email/text

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, RB9 will post a status message, "Email sent successfully," in the Result column.

NOTE: RB9 is not an email program

RB9 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 *(RB9 Standard only)*.

If you want to keep copies of all of your emails sent from RB9, enter your email address in the **Bcc Emails** field in your personal User Preferences window's **Email** pane. (See Customizing email preferences.)

Reference

- Email preferences
- Form Templates
- Send Job Confirmation/Cancellation
- Send Assignment Notification/Cancellation
- Send Invoices
- Invoice Inquiry
- User Preferences

Step-by-step instructions

- Emailing & texting from RB9
- Entering general contact information

- Entering general location information
- Entering general resource information
- Alerting clients
- Viewing client activity
- Finding overdue invoices
- Sending collection letters
- Sending letters to contacts
- Sending letters to witnesses
- Sending letters to others
- Entering general witness information
- Updating witnesses
- Finding network members
- Managing tags
- Managing notification emails
- Customizing emails, messages, web pages & stamps
- Customizing communications
- Creating/updating forms & letters
- Viewing email logs

Notifying resources individually

You can notify resources individually when assigning a task or canceling a job or task. Notifications can be sent via text or email or both, and include attachments.

Continued from:

- *Canceling jobs*
- *Assigning resources to tasks*
- *Sending individual assignment notifications*
- *Quickly assigning for high volume of jobs*

1. Select contact method

In the **Send Assignment Notification/Send Assignment Cancellation** panel, check the contact method box(es) for notifying the resource.

If the resource does not have a contact method checkbox (or the checkbox is grayed out), the resource is missing contact information in their profile. To add the resource's contact information to their profile, see Updating resources.

2. Select options

1. To finalize and send the message, see Emailing & texting from RB9.
2. Click **Send.**

NOTE: Include specific types of files in notifications

To automatically include files with emails, such as notices, see Attaching files to notifications automatically.

3. Finish

After RB9 sends the message, click **OK** in the popup that appears. RB9 records the date and time in the task's **Notified Date** field, and makes an entry in the job's Notes Log and RB9's Email Log *(RB9 Standard only)*.

TIP: Save time with mass notifications

Instead of sending notices one by one, send them in batches by using Send Assignment Notifications/Cancellations.

Reference

- Tools > Form Templates

- Email preferences
- Notes Log
- Email Log
- Send Assignment Notifications/Cancellations

Step-by-step instructions

- Canceling jobs
- Assigning resources to tasks
- Sending individual assignment notifications
- Quickly assigning for high volume of jobs
- Updating resources
- Creating/updating forms & letters
- Emailing & texting from RB9
- Attaching files to notifications automatically
- Sending batch assignment notifications/cancellations

Settling cases

When a case is settled, if there are any upcoming jobs scheduled, you can cancel them plus any associated tasks when you change the case status.

Continued from Searching cases or Entering general case information.

1. In a View Case window, click **Edit.**
2. In the **Change Status** panel, select Settled in the ***Status to be** drop-down.
3. Enter notes about the settlement in the **Remarks** field, if desired.
4. Select today's date or the relevant date in the **Cancel jobs after this date** field to cancel all future jobs scheduled for the case automatically. See Date Navigator.
5. Check the **Cancel tasks belonging to cancelled jobs** box to have all tasks related to the canceled jobs canceled too.
6. Click **Save.**
7. To send cancellation notices about the canceled jobs/tasks to:
   - **Clients** – See Sending job confirmations or cancellations.
   - **Resources** – See Sending batch assignment notifications/cancellations.

Reference

- Case
- Jobs
- Tasks
- Date Navigator

Step-by-step instructions

- Searching cases
- Entering general case information
- Sending job confirmations or cancellations
- Sending batch assignment notifications/cancellations

Customizing notes & remarks

Customize the appearance of the contents of different Notes, Remarks, and Invoice Message fields.

Continued from Entering general case information, Entering electronic billing information, Entering tasks, Updating tasks, or Selecting invoice messages.

In most Notes (such as Direct Billing Notes), Remarks, and Invoice Message fields, when:

- **Entering text**

  Set these options then enter text.

- **Changing existing text**

  Select text to be customized then select options.

  - **Text options**

    - **Bold**

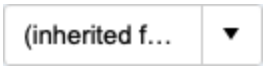
      Toggle the selected text's weight between the default and bold.

    - **Italic**

      Toggle the selected text's style between the default and italic/oblique.

    - **Underline**

      Underline selected text, including word spaces, with a single line.

    - 

      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 drop-down 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. RB9 does not save your adjustments after closing the window.

Entering ordering client information

While you must enter required job information *(designated by * in RB)* before saving a new job, you can enter other information, such as the scheduling firm if it's different from the ordering firm, at any time.

1. Access a job

1. If not already in a New Job/Edit Job window, find the job in **Calendar > Jobs (List View)/Jobs (Monthly View)/Jobs (Weekly View)** and open the job. See Searching jobs.
2. In the View Job window, click **Edit.**

2. Enter information

In the **Ordering Client** pane of a New Job/Edit Job window:

1. ### Scheduling Firm

   If the firm scheduling the job is different from the firm ordering the job, click ▽ **> Lookup Firm** in field and find the firm. See Looking up firms. **Scheduling Firm Warning** comes from the scheduling firm's entry in Firms.

2. ### Scheduling By

   If you entered a scheduling firm, select the scheduling contact from the drop-down of the firm's contacts, or click ▽ **> New Contact** to add a new contact to the scheduling firm (see Adding contacts to RB9). **Scheduling By Warning** comes from the scheduling contact's entry in Contacts.

3. ### *Ordering Firm

   Required. Change if needed by clicking ▽ **> Lookup Firm** in field. See Looking up firms. Changing the ordering firm does not change the scheduling firm, so you can have different ordering and scheduling firms for a job. **Ordering Firm Warning** and **Ordering Firm Calendar Notes** come from the ordering firm's entry in Firms.

4. ### *Ordering Contact

   Required. Select from default drop-down of the ordering firm's contacts, or click ▽ **> New Contact** to add a new contact to the ordering firm (see Adding contacts to RB9). **Ordering Contact Warning** and **Ordering Contact Calendar Notes** come from the ordering contact's entry in Contacts.

   NOTE: All required info must be entered before a job can be saved

   If you are entering a new job and not just updating client information, you must also

enter the job date and time in the **General** pane before you can save the job. Once you have set a job with its required information, you can enter other information you have for the job in any order. For instructions for the **General** pane, see Entering general job information.

5. **Save job**

   You can continue entering information in other panes in the New Job/Edit Job window including uploading files to the repository. Before leaving the job, save your entries:

   - In the New Job window, click **Save.** The window changes to Edit Job and additional job detail panes appear with the **Parties** pane automatically scrolled to the top. You can continue entering information in the new panes or click **Save > Save & Close.**
   - In the Edit Job window, click **Save > Save & Edit** to continue entering information or **Save > Save & Close** to exit the job.

Reference

- Firms
- Ordering client
- Scheduling client
- Contacts

Step-by-step instructions

- Scheduling jobs
- Searching jobs
- Looking up firms
- Adding contacts to RB9
- Rescheduling jobs
- Entering general job information
- Entering job locations
- Entering additional job information
- Uploading repository files
- Adding parties
- Updating parties
- Requiring specialties
- Awarding points
- Entering tasks

Canceling case jobs

Instead of cancelling jobs one at a time save time with this feature and cancel any or all jobs associated with a case at once.

1. In the Edit Case window of the case you want to cancel jobs for, click **More > Cancel Jobs.**
2. In the **Cancel Jobs** panel, all jobs attached to the case are listed along with their color coded job status. Check the box in the header to select all jobs that haven't been cancelled yet or check the boxes of individual jobs you want to cancel.
3. Enter any notes about the canceled jobs in the **Remarks** field. Anything entered here will appear in the **Remarks** column in the canceled jobs' **View Status History** panel.
4. Click **Save.** Click **Yes** in the popup that appears.
5. The **Cancel Jobs** panel closes automatically. In the Edit Case window, click **Save.**

IMPORTANT: Cancellation notices are NOT sent when mass canceling jobs

When mass canceling jobs, Job Cancellation and Assignment Cancellation notices are not sent automatically. Use Send Job Confirmations/Cancellations and Send Assignment Notifications/Cancellations respectively after canceling jobs with this feature to send notices.

Reference

- Case
- Jobs
- Send Job Confirmations/Cancellations
- Send Assignment Notifications/Cancellations

Step-by-step instructions

- Searching cases
- Sending job confirmations/cancellations
- Sending batch assignment notifications/cancellations

Editing form Data Fields options

Form Templates' Data Fields options let you insert RB9 data fields and other fields into your forms. You can also delete fields from forms.

Continued from Batch printing assignment notifications/cancellations, Updating forms for hybrid job locations, Updating forms for separate task times, or Editing forms & letters.

- ## Add fields

  In the New Form/Edit Form window, click **Data Fields:**

  Click in the form where you want to insert a data field, then select the field from one of the contextualized drop-downs:

  - ### Insert Data Field

    Select an RB9 data field to add to the form where the cursor is.

  - ### Insert Data Table

    Not available in all types of form templates

    Select a special RB9 data field that can list multiple RB9 entries. Then in the **Insert Data Table** popup's **Select Data Field** options, choose which entry content to include and how it will be displayed in the form. Then click **OK.**

  - ### Insert Special Field

    Select a generic form field to add to the form where the cursor is.

- ## Modify fields

  1. Click in the field you want to modify then click **Data Fields > Field Properties.**
  2. To add/update an option:

     - ### Name

       Edit the text of the default field name.

     - ### Format

       To automatically convert the text's case click one of the options in the list.

     - ### Text to be inserted before

       Check the box then enter boilerplate text you want to appear before the merge data.

     - ### Text to be inserted after

       Check the box then enter boilerplate text you want to appear after the merge data.

- **Date/time format**

  To change the default date/time format copy a data field option from the **Insert Special Fields > Date** popup then check this box and paste the new format here.

- **Numeric format**

  Check the box then add $, decimal numbers, etc.

- **Preserve formatting during updates**

  Check the box to keep your modifications through future RB9 updates.

3. Click **OK.**
4. To change a field's formatting see Editing form Home 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 use 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.

TIP: Customize fields' appearance

You can edit the fields' appearance on the form using the tools in Home (and Table Tools for List Data fields set as tables).

NOTE: Form Templates' contextualized drop-downs

Instead of listing every available RB9 data field for you to scroll through, RB9 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.

Step-by-step instructions

- Batch printing assignment notifications/cancellations
- Updating forms for hybrid job locations
- Updating forms for separate task times
- 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 Table Tools options
- Editing form Frame Formatting options

Entering video information

RB9 Standard only

If a deposition was recorded, use the **Media Set** panel to enter information regarding the source tapes and their archival status.

Continued from Updating tracking.

1. In the Edit Tracking window, click on the **Media** pane.
2. In the **New Media Set** panel, enter the following information:
   - **Media No.**

     Sequential number starting with 1. This will be used to print media labels (e.g., Tape 1 of 4).
   - **Media Format**

     Format of the source tape
   - **Start Time**

     Beginning time stamp in the source tape
   - **End Time**

     Ending time stamp in the source tape used to calculate **Running Time.**
   - **Running Time**

     Total run time is calculated automatically.
   - **File Name**

     Name of the digitized file
   - **Remarks**

     Any special notes about the media
3. Click **Save.**

Step-by-step instructions

- Updating tracking

Printing envelopes

RB9 Standard only

Print addresses from your RB9 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** drop-down, either:
   - **Leave at the system default.**
   - **Select a different standard envelope size** in the dropdown.
   - **Choose "Custom,"** 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.** RB9 will generate a PDF file of the envelope(s) and open it in *Adobe Acrobat* for printing.

NOTE: 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.

Reference

- PDF

Step-by-step instructions

- Printing envelopes and labels
- Printing PDFs from RB9

Turn In

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

TIP: Create RB-PDF Transcripts in Turn In

If you do not have resources upload ASCIIs through RB Connect, you can make RB-PDF Transcripts from ASCII files uploaded in Turn In instead of using the separate PDF Transcript function.

Reference

- Parties
- Service items
- Jobs
- RB Connect
- PDF Transcript

Step-by-step instructions

- Generating invoices
- Finalizing invoices

Post Invoices

Posting an invoice updates the related job's status to Billed, and updates your RB9 ledger, so the invoice appears in your accounts receivable and financial reports.

Step-by-step instructions

- Searching unposted invoices
- Posting invoices

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. 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
- Collections workflow

Step-by-step instructions

- Finding overdue invoices

Reviewing and changing invoice selections

RB9 automatically selects which invoices to pay based on the Original Term and Copy Term settings for each resource. (See Entering pay information.) However, you can review and modify RB9's selection of invoices for any resource. For example, if a reporter asks for more money than is currently due, you can add more invoices to the current pay sheet instead of giving an advance.

Continued from Verifying resource pay.

1. In the Pay Resources window of the current payroll, click the hyperlinked resource you want to review.
2. Invoices that are outstanding to the resource appear beneath the resource name. Invoices that are to be paid in the current payroll are checked in the **Pay** column.
   - To add an invoice to the current payroll, click next to the invoice **> Set Pay.**
   - To remove a selected invoice from the current payroll, click next to the invoice **> Clear Pay.**

TIP: Sort resource's invoice list by columns

If a resource's list of invoices is too long to see what you want easily based on invoice number, click a different column header to sort the list by that column in ascending order. Click the header again to view the list in descending order.

NOTE: Check the adjusted pay amount

As you add or remove invoices for a resource, the total pay for the resource adjusts in the **Amount** column.

Reference

- Payables payroll procedure

Step-by-step instructions

- Entering pay information
- Verifying resource pay

Resetting payroll and starting over

If you discover errors on the draft Resource Pay Statements report — for example, if you started a payroll and then realized the pay date was wrong — or there are errors in a resource's pay, you must reset the payroll so that all of the invoices selected to be paid revert back to unselected, then fix the errors and start the payroll again.

If you find the errors are due to incorrect pay info settings in the resources' profiles (such as original term or copy term), correct those settings first before resetting the payroll. (See Entering pay information.)

1. **Payables > Pay Resources**
2. In the Pay Resources window's **Search By** pane, click ***Pay Date's** .
3. In the Lookup Pay Date popup, open pay dates are listed. Click a hyperlinked pay date to select it. (Pay dates are set in Setup > Pay Dates.)
4. In the Pay Resources window's **Search By** pane, **Pay Group** and **Cutoff Date** default to their settings associated with the pay date selected. (Pay groups and cutoff dates are designated when setting up pay dates.)
5. Click . RB9 lists all of the resources that are to be paid on the specified pay date. (Resources are paid based on the number of days from the invoice date entered in their pay information for originals and copies. See Entering pay information.)
6. Click **Reset Payroll.** RB9 resets the payroll, removing all listed resources. If the payroll included any pay adjustments that didn't have a specified pay date those pay adjustments will be set to the next payroll you calculate. See Entering pay adjustments.
7. Correct the errors, and start the payroll process again by running the Draft Resource Pay Statements report. See Verifying resource pay.

Reference

- Payables payroll procedure
- Pay Dates
- Cutoff Date

Step-by-step instructions

- Entering pay information
- Setting up pay dates
- Entering pay adjustments
- Verifying resource pay

Certifications

A **certification** in RB9 is a resource's degree, accreditation, license, or other formal acknowledgement of specialized coursework completion. Certification examples include Registered Merit Reporter (RMR) and Certified Realtime Reporters (CRR).

TIP: Customize which certifications are listed in RB9
Certifications are set up in Lists > Resources.

Reference

- Resources lists

Step-by-step instructions

- Entering certifications

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 RB9 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

Creating pay rate tables

Create pay 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. If you have set up your Rush Type Master, all of your rush rates will automatically fill in your pay rate tables. You can edit rush rates for individual pay rate tables.

Continued from Setting up pay rates or Copying pay rate tables.

1. Enter basic details

1. In the New Pay Rate window:

   - **Pay Rate Group**
     Default group appears (set in Lists > Accounting). Select a different pay rate group in the drop-down, if the new pay rate table should be in a different category.

   - ***Pay Rate Name**
     Required. Enter a description of what the rate table covers. Make the description easy for your billing staff to understand when it should be used.

   - **Active**

     Yes by default. Slide to No to have pay rate table hidden in drop-downs.

   - **Remarks**

     Enter any relevant notes or comments.

2. Click **Save.** Window changes to Edit Pay Rate and adds Service Item and Rush panes.

2. Enter rates

1. In the Edit Pay Rate window, scroll or jump to **Service Item** pane.
2. **To enter or update pay rates and options,** click the hyperlinked **Service Item** you want to edit. See Entering billing & pay rates.
3. **To update any rush charges,** scroll or jump to the **Rush** pane. Your default rush rates from the Rush Type Master can be customized here for this individual Pay Rate table.
4. Click the hyperlinked **Rush Type** you want to edit. See Setting up rush charge types.

5. Click **Save.**

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

- Pay Rate Groups
- Rush Type Master
- Accounting lists
- Billing Sets
- Rates setup workflow

Step-by-step instructions

- Setting up pay rates
- Copying pay rate tables
- Entering billing & pay rates
- Setting up rush charge types
- Setting up billing sets

Signature Guide Form

Instructions:

1. Print out this form, then sign your name in black ink in the solid box below. Make sure that your signature does not extend beyond the borders.

2. Scan or take a picture of your form and save as PNG or JPG format.

3. Cut your signature image without the borders and save as PNG or JPG format.

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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

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, & stamps.
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, & stamps

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, & stamps.
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, & stamps
- Closing tickets

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, & stamps.
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, & stamps

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 "RB9 Billing," which is too generic, write "RB9 payments by mobile app" to title a request to add a mobile app payment option in RB9 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

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' RB Connect or slide to No to hide it from contacts.
   - **Show to Resource** – If this option appears, slide to Yes to have the entry appear as a selection in resources' RB Connect or slide to No to hide it from contacts.
   - **Do not attach any files from All-Resources-level, Firm-level, Job-level, and Case-level repository to Assignment Notification** – *(Jobs > Task only)* If this option appears, slide to Yes to not include these automatic file attachments to emails sent for the task.
   - **No Turn-in** – *(Jobs > Task only)* If this option appears, slide to Yes for tasks that are not turned in by resources.
3. Click **Save.**

- ### Merge drop-down 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 RB9 will not have a **Merge To** option.)*

- ### Delete a drop-down 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 RB9.

- ### Hide a dropdown entry

  Some RB9 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. Slide **Active** to 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 RB9 and you are not allowed to hide it.
  3. Click **Save.**

Reference

- RB Connect
- Accounting list
- Cases list
- Connect list
- Contacts list
- Firms list
- Invoice list
- Jobs list
- Locations list
- Others list
- Production list
- Repository list
- Resources list
- Tracking list
- Users list
- Witnesses list

Step-by-step instructions

- Merging data