

What's inside RB8

RB8 handles your important business tasks, such as billing and scheduling, in a flexible, interconnected environment that includes mobile and PDF transcripts, instant text message job notifications and email job confirmations. It includes a central repository, so you no longer have to keep hard copies of important information. Plus it handles deliveries, receivables, collections, payables — including direct deposit payroll — and business tracking and forecasting, with a full range of reports from work load to cash flow to profitability.

RB8 comes with everything most legal support firms need to manage their business built in. It is a turn-key system, but customizable so you can tailor it to your business and the specific services you offer.

RB8 is available by subscription with the convenience of automatic low monthly payments. You can add or subtract users as your needs change. You can also choose to either host RB8 on your own server in-house (with RB8 Subscribe), or subscribe to remotely-hosted RB8 Cloud, which eliminates the need for your own server, repository, back-up system, and IT staff.

Modules in RB8:

Calendar – Handle your daily scheduling, notifying and confirming tasks. Update, confirm and cancel jobs. Assign, notify and confirm reporters. Track and analyze jobs. Notify clients when requests are received. Send clients and resources their job calendars, which they can import into their *Outlook* calendars. Import client requests from RB Web. Upload case- and job-level files to the repository.

Production – Turn in jobs, create PDF transcripts (including condensed versions) & apply digital signatures, create mobile transcripts in Transcript Packages, fulfill client requests, and prepare jobs for billing. Archive all documents by case, job, witness, resource, firm, invoice or general filing. Grant clients and resources access to files and invoices online through RB Web. Generate labels, envelopes and form letters. Track UPS & FedEx shipments.

Billing – Print and post invoices, including COD invoices. Export invoices in *LEDES 98B* format for clients who require electronic billing.

Inquiry – Instantly locate information about jobs, invoices, clients, resources, witnesses, payments and transcripts. Analyze aspects of your business, such as clients' billing activity and reporter billing and pay amounts. Run month-, quarter- and year-to-date totals.

Receivables – Credit and track client payments. Assess finance charges, print monthly reports, and monitor collection efforts. Apply retainers. Track and manage COD invoices.

Payables – Perform payroll tasks. Generate forms and reports pertaining to payroll, including 1099s. Cut payroll checks, direct deposit paychecks, or export payroll to *QuickBooks*.

Setup – Set up and maintain your company, job location, client and resource (reporters, videographers, interpreters, etc.) information.

Reports – Analyze your business's productivity, profitability and other relevant data.

Tools – Customize menus. Set up users and group them according to their access levels and job functions. Create forms and letters. Maintain and back up your RB database. Perform custom searches of your RB database. Import invoices, paychecks and payment transactions into *QuickBooks*.

Optional plug-ins

RB Web – Give clients and resources (reporters, videographers, interpreters, scopists, etc.) secure online and mobile access to their job calendars and financial information, plus online access to case and transcript repositories, downloadable invoices, and a smart deposition scheduler for your clients and a job turn-in wizard for your resources. Clients can pay invoices over the Internet.

With RB Web, you can also access your office wirelessly to check on a day's assignments and calendar entries or look up contact information for clients and resources. Optional plug-ins for RB Web add native mobile access, full-text search, file annotation, streaming media capabilities, and reporter/sales rep client calendars.

Tracking – Monitor jobs as they move through your production workflow. Set up tracking to fit your workflow. Then track transcripts, exhibits, video, even archived files, so you always know their location and current status. Produce reports to document your process.

Reward Points – Track your best customers based on the business generated by their calls to you. Then reward them using a points system similar to an airline or credit card reward plan. Add the RB Web My Reward Points plug-in so they can keep track of and redeem their points online.

For more information on RB8 plug-ins, visit our website.

What's inside RB8 – continued

Turn-key system for legal support firms

RB8 comes with built-in defaults so you don't have to start from scratch defining common items. RB8's built-in defaults incorporate business logic and best practices for legal support firms derived from our 30+ years of developing software for this industry. You can add to, delete from, or edit defaults, such as services offered, to customize RB8 to your unique business needs.

System grows to fit any size office

The basic RB8 system includes the RB8 server software and database, client software for workstations and laptops to access the RB8 server, and Client Access Licenses (CALs). CALs allow users to access your RB8 server with the client software. You need as many CALs as you will have users accessing the RB8 server at a time. Additional CALs can be added at any time to handle your firm's growth.

Basic RB8 office management package includes:

- **RB8 Server**, which installs on the server (or main computer, depending on system size). The RB8 Server contains your RB database of clients, resources, jobs, etc.* (If you subscribe to RB8 Cloud, we install and maintain your RB8 Server on the Microsoft Azure platform.)
- **RB8 Client**, which installs on a workstation and accesses your database on the RB8 Server.**
- **Annual software maintenance & support contract**, either Standard or Premium.***
- If you subscribe to RB8 Cloud: **Repository storage and data mirroring**, eliminating the need for your own in-house or third-party repository solution, or a back-up system.

RB8 software maintenance and support contracts are required to ensure that you have the latest updated software and help when you need it. Choose the plan that's right for your business.

Standard includes unlimited support via phone, fax, email, live chat, website and remote during our regular business hours, plus automatic updates & upgrades of RB8, free listing in the RB XChange job exchange, and other valuable services. It is included free in your subscription.

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

For more information about RB8 support plans, visit our website.

Add online offices to your ReporterBase suite

To get the most benefits from RB8, add RB Web online offices, which give clients and resources online access to their information, including downloadable files, such as transcripts and invoices. Plus clients can pay invoices and resources can turn in jobs online. RB Web optional plug-ins give clients the ability to do full-text searches on files in their online repositories and watch video transcripts online.

Adding RB Web puts your RB8 office on the web and automates your routine interactions with clients, so you can concentrate on the most profitable aspects of your business while giving clients top-level service, including online status reports in real time and online repositories for case files.

For more information on RB Web, visit our website.

Subscribe to RB8

RB8 is available by subscription in two versions: in-house RB8 Subscribe or hosted RB8 Cloud. For as little as \$150/month, you get a full office management system. Or for \$250/month, get the same system but with server hardware/software, better-than-backup system, and file repository included.

For more information about subscribing to RB8, visit our website.

RB8 is backed by an unconditional, 30-day, money-back guarantee, so you can try it risk-free.

* Each server/main computer requires a separate RB8 Server license.

** Each workstation that accesses the RB8 Server simultaneously requires a separate user license. Additional user licenses can be added or subtracted on a monthly basis for an additional fee.

*** Each RB8 Server license includes Standard support in your monthly fee. You can upgrade to Premium support for an additional monthly fee.



ReporterBase

For more information about RB8, RB8 Cloud and other RB options, please contact RB Sales:

851 California Drive, Burlingame, California 94010 | 650-396-2105 | 650-560-6550 (fax)
info4@omti.com | www.omti.com/rb