



User Guide

Version 8.92

Updated 8/28/2024



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Chapter 1: Program Basics

Before using MR8, orient yourself to the system. Learn basic shortcuts so you can use MR8 efficiently.

Concepts and functions covered in this chapter:

MR8 Interface

Data Entry

Data Grids

Notes Log

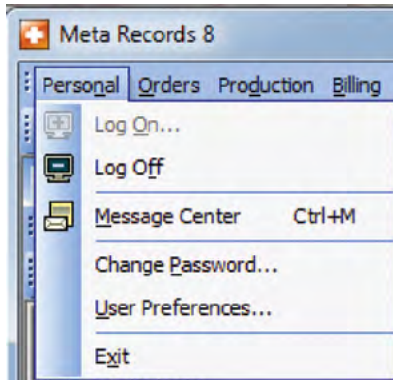
Message Center



MR8 Interface

About menus and toolbars

A *menu* displays a list of commands. Some of these commands have images next to them so you can quickly associate the command with the image. All of MR8's menus are located on the menu bar, which is the toolbar at the top of the screen. The menu bar is always visible and cannot be hidden.



In addition to the menu bar, MR8 provides a standard toolbar with buttons (icons) that you click to carry out frequently used commands. You can change the toolbar to suit your needs, move it where it is most convenient, or hide it completely. See "Increasing the size of toolbar icons," "Hiding the standard toolbar," "Moving toolbars" and "Customizing the standard toolbar."



MR8 Interface

Increasing the size of toolbar icons

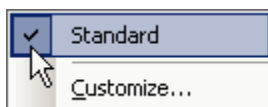
MR8 allows you to change the size of the icons displayed on the standard toolbar. This can make navigation easier and reduce eyestrain.

1. Right-click anywhere on the toolbar, then choose **Customize**.
2. Click the **Options** tab.
3. Check the **Large icons** box.

MR8 Interface

Hiding the standard toolbar

If you do not want to use the standard toolbar, you can hide it. Right-click anywhere on the toolbar, then click **Standard** to clear the check mark. The standard toolbar disappears. Repeat the process to make it visible again.



MR8 Interface

Moving toolbars

Toolbars do not have a fixed location in MR8. You can have toolbars floating freely in the window, or anchor them to the top, bottom or either side of the window.

Use the mouse to grab the toolbars by their handles (located on the left-hand end of each toolbar) and move them around the MR8 window.

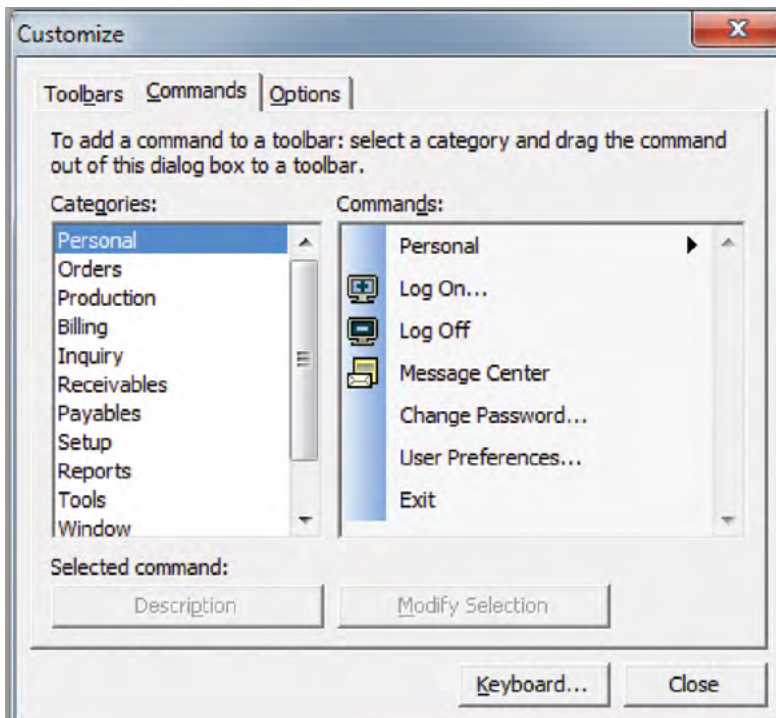


MR8 Interface

Customizing the standard toolbar

MR8 has a dynamic user interface that is very easy to modify to match your needs and tastes. Customize the standard toolbar by adding the buttons you use often. Delete ones you don't need. You can even move individual buttons to rearrange them.

1. Right-click anywhere on the toolbar, then choose **Customize**.
2. Click the **Commands** tab.
3. Customize the toolbar by doing any of the following:
 - **To add** – Select a category in the **Categories** list. Then drag the button you want to add from the **Commands** list to the standard toolbar.
 - **To delete** – Drag the button you want to delete off the standard toolbar.
 - **To move** – To move a button, hold down the **Alt** key, then drag the button to its new location.



Using key shortcuts

You can use keyboard shortcuts instead of mouse-clicks for many operations in MR8. For example, many menu commands and buttons have equivalent keystroke combinations.

1. To select a menu option or button action with key shortcuts, hold the **Alt** key and press the key for the underlined letter of the option, such as **Alt + O** to select the Orders menu.

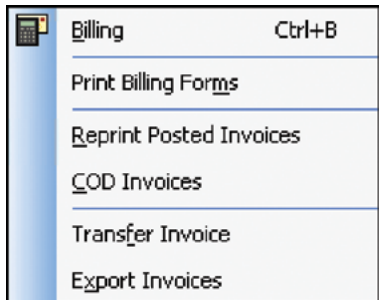
Personal Orders Production Billing Inquiry Receivables Payables Setup Reports Tools



CAUTION

The underlined letter is not always the first character in the word.

2. In the drop-down menu that appears after selecting a menu option, use any of these techniques:



- Press the key for the underlined letter of the operation you want to perform.
- Press the up arrow key or the down arrow key to highlight the option. Then press the **Enter** key.
- Use the key shortcut listed, such as **Ctrl + B** for Billing.



TIP

Key shortcuts listed in drop-down menus, such as **Ctrl + B** for Billing, can also be used without first accessing the menu.

3. Other menu key shortcuts:

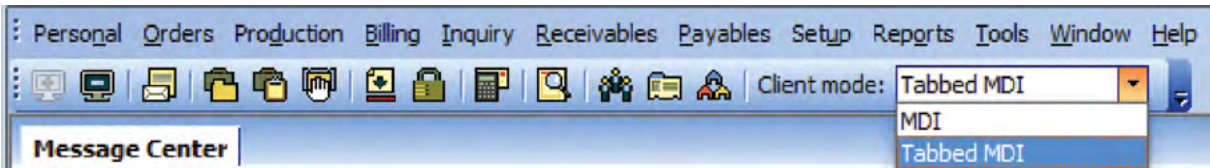
- To display a different menu from the one pulled down, press the right arrow key or the left arrow key.
- To cancel a menu, press the **Esc** key.

MR8 Interface

Working with windows

When you select a function from MR8's toolbars, a window opens (as a tab) containing controls for that function. You can have more than one window open at a time, switch back and forth between them, even copy information from one window to another.

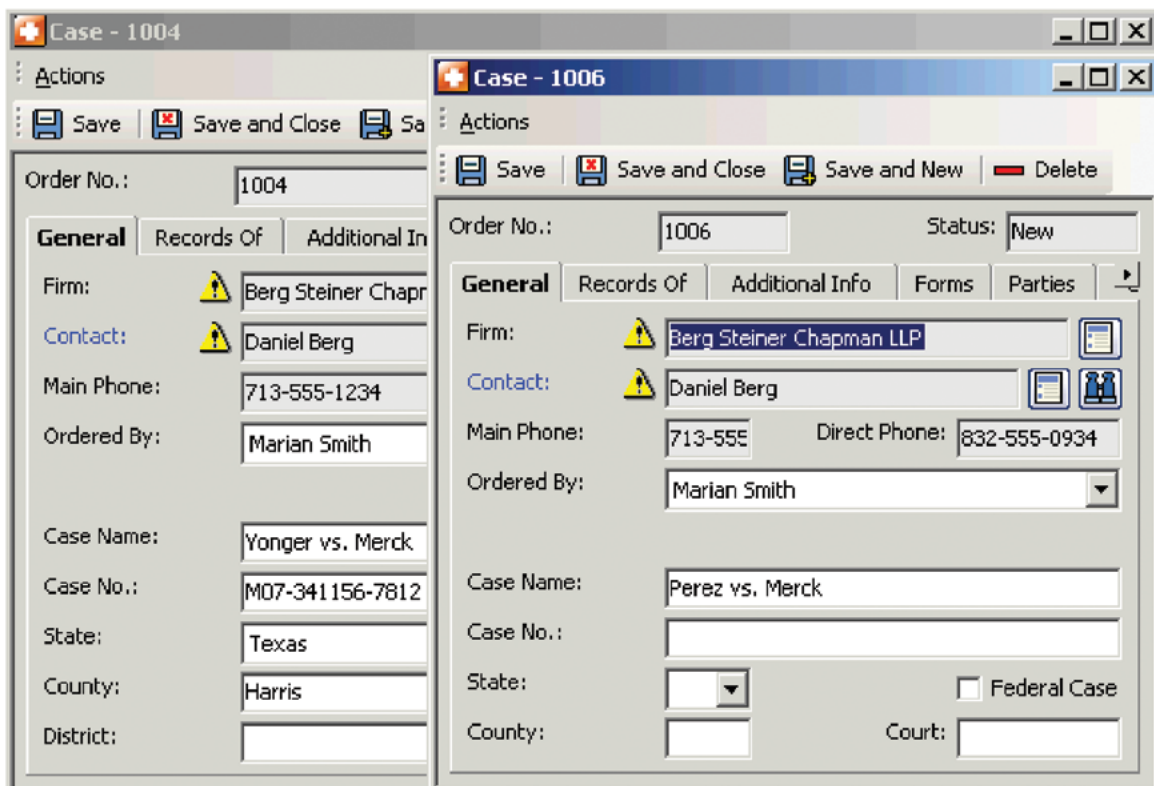
- **Tabbed windows** –MR8's default is to open functions in a single window with tabs at the top. Switch to any window by clicking its tab. For alternate views, select MDI in the **Client mode** drop-down. The windows cascade automatically. Choose **Window > Tile Horizontally/Tile Vertically** for other views.



- **Scalable windows** – Change the size of any window by dragging it to the desired size. Put the mouse cursor on the edge of a window (that is not maximized); when the pointer changes to a double arrow, click and drag to the new size.



- **Multiple instances of the same window** – Have more than one detail window open at the same time. For example, you can have two cases (patients) open side by side to compare or to copy and paste information between.



Working with the Search Criteria pane

A typical window in MR8 consists of the toolbars and two panes: the *Search Criteria* pane and the *Results* pane. The Search Criteria pane contains one or more filters that can be used to focus a search.

- **Multiple search criteria** – You can apply search filters either one at a time or in combination with each other.

- **Multiple selections** – You can select multiple items in most drop-down lists. Check **ALL** to select all items. Uncheck **ALL** to clear all checkmarks at once.

Part Status:

Business Units:

- **Database fields and binoculars buttons** – Grayed-out fields display information from the database; you cannot type any text in those fields. If a grayed-out field has a binoculars button next to it, you can click the button to browse for a record. You can also paste content from MR8 clipboards into grayed-out fields. (See “Copying to MR8 clipboards.”)



NOTE

When making multiple selections, if you select more than 200–250 items, MR8 cannot process the request. A “Too many items are selected” alert will appear.



TIPS

To remove the selection from a grayed-out field, highlight the entire field, then press **Delete**.

To view all the MR8 entries for a single search field, enter a percentage sign (%) in the field and click **Search**.

Clear all search criteria at once by clicking the eraser button.



Clear Search

Working with the Results pane

When you request information from MR8, it presents the information in the *Results* pane as a grid, divided into horizontal rows and vertical columns. The first row is always the *heading row*. It contains labels that explain the contents of the columns.

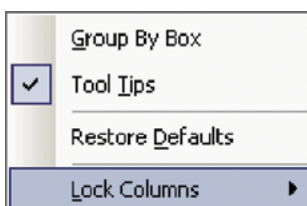
Use the following tips to search through results faster:

- **Record Navigator** – Instead of scrolling through a list of data, go to a specific record quickly by entering a number or using the arrow keys in the **Record Navigator** at the bottom of any Results pane.

	Rush	Processor	Order No.	Order Date	Records Of	Case Name
▶	<input checked="" type="checkbox"/>	Alicia Smith	1004	9/5/2007	Robert Yonger	Yonger vs. Merck
	<input type="checkbox"/>	Larry Shoe...	1005	9/5/2007	Stella Chang	Johnson vs. Merck
	<input type="checkbox"/>	Joan Wells	1006	9/5/2007	Juan Perez	Perez vs. Merck
	<input checked="" type="checkbox"/>	Alicia Smith	1008	9/5/2007	Jerry King	King vs. Merck
	<input checked="" type="checkbox"/>	Alicia Smith	1009	9/11/2007	Mike Frazer	Frazer vs. Merck
	<input type="checkbox"/>	Joan Wells	5000	9/19/2007	Fred Wolf	Johnson vs. Merck
	<input checked="" type="checkbox"/>	Alicia Smith	5002	10/16/2007	Yong B. Lee	Lee vs. Merck

Record: 1 of 7

- **Sorting rows** – You can sort the information in the data grid by column in either ascending or descending order. Click the heading of the column you want to sort the rows by. Click the column header again to switch the sort order.
- **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.
- **Rearranging columns** – Rearrange the display order of columns by dragging any column header to a different location.
- **Selecting multiple rows** – Select adjacent rows by clicking the first row, then holding down the **Shift** key as you click the last row. To select a group of non-adjacent rows, hold down the **Ctrl** key as you click the rows you want.
- **Locking columns** – You can lock (freeze) up to three of the leftmost columns so they remain visible when scrolling in the grid.
 1. Click **Actions** (or right-click anywhere on the column header row), then click **Lock Columns**.



2. Choose **1st Column**, **2nd Column** or **3rd Column**. The selected column and all columns before it are frozen and will remain in view when scrolling.



NOTE

When you return to a function in MR8, it displays the grid according to how you last set it up in that function.

Data Entry

Entering dates

Every date field in MR8 has a perpetual calendar, called the *Date Navigator*, accessed by clicking the arrow button next to it. It provides a quick and easy way to change and view dates.

Order Date:

September 2007						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6
Today: 11/6/2007						

The date circled in red is today's date.

The date in blue indicates the current selection.

Use the Date Navigator to:

- **Select another date**, by clicking the date you want.
- **Move to the previous month**, by clicking the left arrow button.
- **Move to the next month**, by clicking the right arrow button.
- **Choose from the list of twelve months**, by clicking the month name. Then drag up or down to select another month from the list that appears.
- **Choose another year**, by clicking the year. Then click the up or down arrow button that appears.

**TIP**

You can also change dates by using the keyboard.

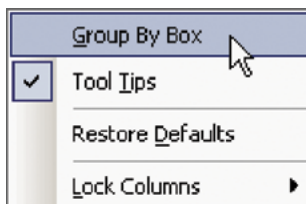
In the date field, click the month, day or year to highlight it. Press the up or down arrow key to change the value by one each time or type a number. Press the right or left arrow key to move the highlight to the next part of the date.

Data Grids

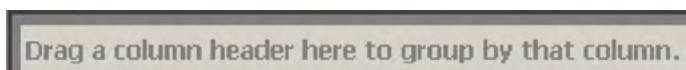
Grouping rows

Information presented in a data grid can be further organized using MR8's "grouping" capability.

1. Click **Actions** (or right-click anywhere on the column header row), then click **Group By Box**.



2. The following box appears above the column header row:



3. Click and drag any column header into the box. Entries in the grid are grouped by the selected column.



TIPS

You can further divide information into subgroups by clicking and dragging other column headers into the grouping box. MR8 remembers your settings the next time you access it. To ungroup, simply reverse the process.

Any customizations done to each grid are stored locally on each workstation. Therefore, you can tailor each grid to suit your need without affecting anyone else. But if you want to revert back to the original factory settings, right-click anywhere on the column header row, then choose **Restore Defaults**.

Data Grids

Merging data

If you no longer need a particular entity, such as a business unit, service item, or firm, but want to keep its data, you can merge it into another existing entity in the same data grid.

1. Click **Actions** (or right-click on the grid), then choose **Merge To**.
2. In the Merge To window, click the entry you want to add the removed entry's historical data to. In the MR8 pop-up window, click **Yes**.

Data Grids

Updating multiple entities at once

If you have a number of entities that need the same information changed, such as Payment Terms or Statement Type, change them all at once with Bulk Update.

1. In the data grid, select all of the entities you want to update.
2. Click **Actions** (or right-click on the grid), then choose **Bulk Update**.
3. In the Bulk Update window, select the category you want to change in the **Choose field to update** drop-down. Then enter its new value in **Set Value to**.
4. Click **Save**.

Data Grids

Copying to MR8 clipboards

If you search for the same information multiple times daily, save time by using MR8 clipboards. MR8 stores the last selection saved for each type of entity up to the maximum number of clipboards you have specified. You can have up to 10 clipboards at a time (see “Configuring your workstation.”). You can then paste to the same type of entity’s lookup field in other windows eliminating the needs to search and select the same information again.

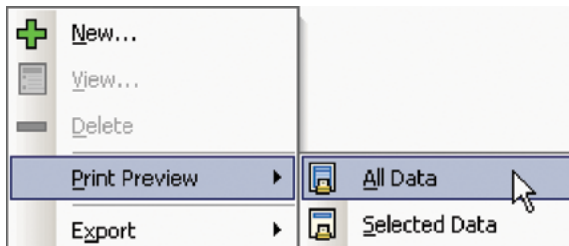
1. Right-click a selection you want to copy to the clipboard (or click **Actions**), then choose **Copy to MR8 Clipboard**.
2. To use a saved entity, right-click in a search field and paste. MR8 automatically pastes the correct type of entity from your clipboards.

Data Grids

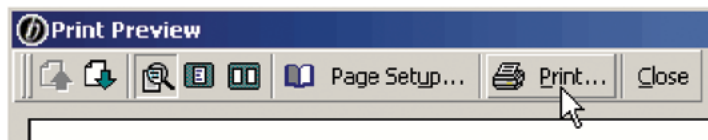
Printing data grids

You can preview and print any data grid.

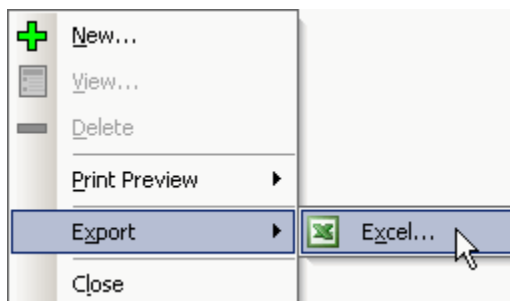
1. Click **Actions** (or right-click anywhere on the grid), then choose **Print Preview**.



2. Select either **All Data** or **Selected Data**.
3. In the Print Preview window, click **Print**.

**TIP**

To export a data grid, highlight the rows you want to export, right-click anywhere on the grid, then choose **Export > Excel**. Do any cleanup, if needed, in *Microsoft Excel*.



Notes Log

Making notes

You can trust your MR8 notes because every entry is stored and listed separately, and entries cannot be edited nor deleted. Once saved, log entries cannot be tampered with. They can be cancelled, but they remain in the log with Cancelled By information. You can also enter follow-up dates to have MR8 remind you of automatically.

Notes entered in any Notes Log are for internal use only and are not published on MR Web or in any correspondence with clients or resources.

1. In any detail window, click the **Notes Log** tab. Any previously entered notes either by a user or automatically by MR8 appear in a chronological log.
2. Click **New**.
3. In the New Notes Log, enter the following information:
 - **Received Type** – Select a type in the drop-down.
 - **Received Date** – The default is the current date and time.
 - **Remind Date** – Enter the date for a follow-up. You will receive a reminder message on that day from the Message Center.
 - **Remind To** – After entering a remind date, this field appears. Select someone in the drop-down to receive a reminder message on that day from the Message Center. See “Communicating within MR8.”
 - **Notes Type** – Select a type in the drop-down. (Notes Types are set up in the Code Manager. See “Adding drop-down entries.”)
 - **Notes** – Type the notes. Click **Spell Checker** to check your spelling.

4. Click **Save and Close**.

**NOTE**

Any field in MR8 with a blue label (such as **Notes** in the screenshot above) is a required field.

**TIP**

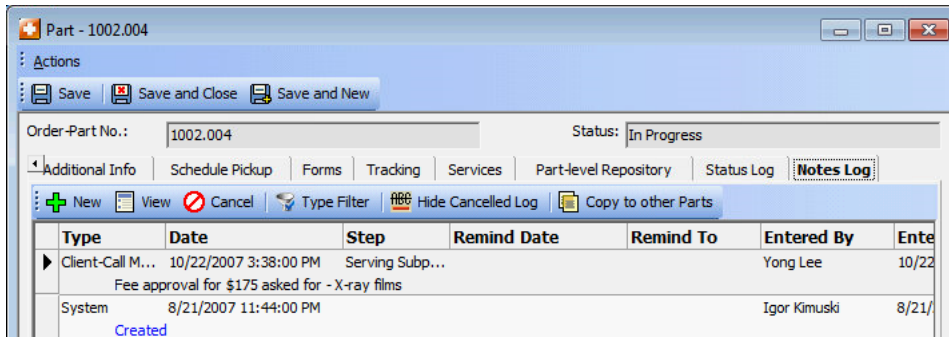
In Case Manager and Orders in Progress, you can use the Add Notes Log function under Actions in the Cases grid, or the Add Part Notes Log function under Actions in Orders in Progress to enter notes without going into the detail screen. Select multiple entries in the grid to add the same note to their notes logs at once.

Notes Log

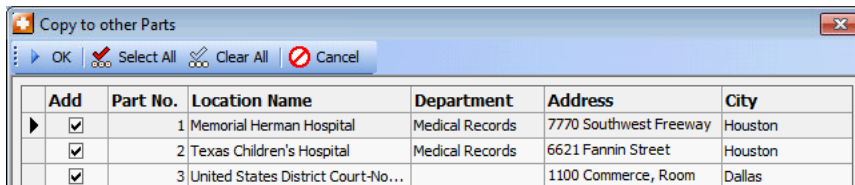
Copying notes to other parts

You can quickly copy notes from one part in an order to any or all other parts in the order.

1. In an order's Part window, click the **Notes Log** tab.
2. Highlight the note you want to copy to other parts and click **Copy to other Parts**.



3. In the Copy to other Parts window, check the **Add** box next to any parts you want to copy the log note to or click **Select All**.



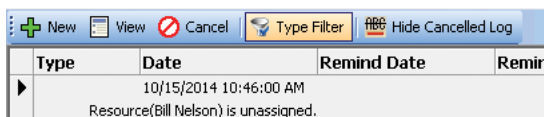
4. Click **OK**.

Notes Log

Viewing & managing notes

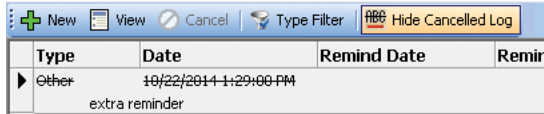
You can view all notes in a log at once or restrict what is shown to keep the log from becoming unwieldy. Because notes cannot be edited or deleted, you can only cancel notes that are no longer accurate or required. If you do not need to view cancelled notes, you can hide them. All cancelled notes disappear from view, but remain in the log.

1. In any detail window's **Notes Log** tab, click **Type Filter** to choose which type(s) of notes to view.



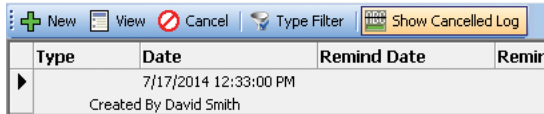
2. In the pop-up window that appears, check the box(es) for the **Note Type(s)** you want to view. Then click **OK**. (Notes Types are set up in the Code Manager. See "Adding drop-down entries.")
3. Only notes that fit your selection appear. If a note is no longer relevant, cancel it by highlighting the note in the Notes Log and clicking **Cancel**. In the pop-up window that appears, click **Yes**.

- To hide cancelled notes, click **Hide Cancelled Log**.



Type	Date	Remind Date	Remir
Other	10/22/2014 1:29:00 PM		extra reminder

- To view the cancelled notes again, click **Show Cancelled Log**. MR remembers your view choice.



Type	Date	Remind Date	Remir
	7/17/2014 12:33:00 PM		Created By David Smith


TIP

Since MR8 offers so many places where you can enter notes, it is sometimes difficult to remember exactly where a particular note was entered. Use the Notes Finder tool to find notes quickly. (See “Searching for notes.”)



Message Center

Communicating within MR8

MR8 has its own message system called the Message Center that works like an internal email system with some unique MR features. Exchange messages with others within your MR8 system, send messages to pre-determined groups of MR users (see “Creating message groups”), and even send yourself reminders about important tasks, such as collections follow-up calls.

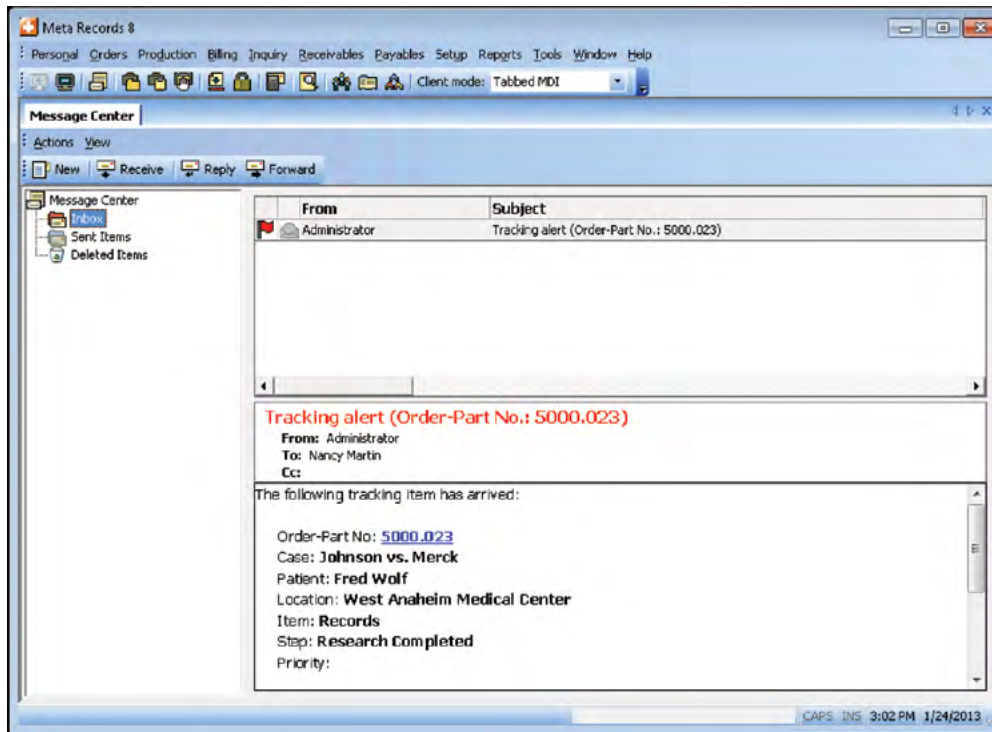
When a message arrives, MR8 displays a desktop alert (a transparent dialog box that stays on screen briefly) in the notification area of the *Windows* taskbar.

- On the menu bar in MR8, click **Personal > Message Center** (or **Ctrl + M**).
- The Inbox appears by default, and the most recently received message is highlighted with its contents displayed below. Click:
 - New** – To compose a new message.
 - Reply** – To reply to a received message. (Select the message before clicking **Reply**.)
 - Forward** – To send the message to other MR8 users.


TIP

So that you do not have to open each message to see if it’s about a rush case or is a reminder:

- Messages related to rush cases are denoted in the Inbox by a red flag.
- Messages that are reminders have the date they were set displayed in the **Remind Date** column.



3. In the New Message window, click the binoculars button next to the **To** field. (In replies, the **To** field is already filled in.)
4. In the Recipients window, click the **Select** box next to any MR8 users you want to receive this message, then click **OK**.
5. Fill in the text fields as you would an email message.
6. If desired, choose these options:
 - **High Importance** – Click to flag this message as important.
 - **Request Receipt** – Click to have the recipient automatically acknowledge receiving your message.
 - **Spell Checker** – Click the ABC button to review your spelling.



7. Click **Send**.

**NOTE**

You can also send messages from other MR8 functions such as Collections Follow-up reminders. See “Following up on collection promises.”

Chapter 2: Repository

Before getting started with MR8, become familiar with its built-in central repository. The central repository is like a vault located in your basement. It's where you store all of your valuable files for safekeeping and quick retrieval. You can also publish repository files to MR Web, designating who can have access to them, at the same time you upload them.

Concepts and functions covered in this chapter:

Central Repository

Uploading Files

Viewing Files

Downloading Files





Repository

Make your office paperless with MR8's Repository. Eliminate filing cabinets. Instead of filing faxed notices, signed copy orders or delivery slips, scan them into your central repository.

Save time by uploading multiple files at a time. Documents can be linked to a case, part, item, invoice, firm or contact. If documents are '*published*,' clients can access them through MR Web. The chart below summarizes the repository in MR8.

FILES	WHERE TO UPLOAD	WHAT TO UPLOAD	IF PUBLISHED, WHO CAN ACCESS THROUGH RB WEB
Case-level	Case detail window	Pre-discovery documents Quotes Order forms Waiver responses	Any contact listed in the Case Parties tab with the Allow case-level repository access box checked
Part-level	Part detail window	Custodian-related documents Fee checks	Any contact listed in the Case Parties tab with the Allow part-level repository access box checked
Item-level	Turn-in (step 1)	Actual records received Delivery receipts	1. Any contact who is billed for the records 2. Any contact listed in the Case Parties tab with the Allow item-level repository access box checked (3rd party access)
Invoice-level	Billing	Invoices	The (Sold To) contact associated with the invoice
Firm-level	Firms	Quotes Contracts	Everyone in the firm
Contact-level	Contacts	Quotes Contracts	The contact and any contacts granted access to this contact
Location-level	Location	For hospitals and doctors' offices, Patient Authorization Forms	Do not publish (for office use only)

Repository

Uploading files

You can upload files of any type and size to MR8's repositories. However, you should be mindful of the following when uploading large files:

- Physical space available on your server
- Internet connection speed of your clients (for download)
- Time required to back up your repository

We generally do not recommend uploading files over 100MB in size. Instead, break up large files into several smaller files before uploading.

1. In any detail window that has a **Repository** tab, click the tab.
2. Click the + sign, then click:
 - **Select Files** – to upload files one at a time.
 - **Select Folder** – to upload a folder of files.
3. Locate and select the file/ folder you want to upload. Then click **Open** or **OK**.
4. In the New Upload window, enter the following:
 - **File Type** – Select the file type in the drop-down.
 - **Publish** – Check this box to make this file available to clients, resources or other authorized users through MR Web.
 - **Access** – Select who can access this file in the drop-down.
 - **Description** – Enter any text describing this file or click the ellipsis button to select a canned description in the Lookup Repository Description window by double-clicking the description. Edit the canned description, if desired. If published, the description appears on your MR Web, and clients can search for files using key words.
5. If you have any additional files, click **Select Files** or **Select Folder**. Then repeat steps 3 and 4.
6. When you have finished adding files, click **Save and Close**. MR8 uploads the file(s) to the repository.



TIPS

You can upload multiple files at once to the repository. To select consecutive files, click the first item in the Open window, press and hold down **Shift**, then click the last item. To select nonconsecutive files, press and hold down **Ctrl**, then click each item.

To change the file type, publish or access attributes of more than one file, select the files and click **Bulk Update** in the New Upload window. Choose a selection in the **Choose field to update** drop-down and set its value in the **Set Value To** drop-down, then click **Save**.



NOTES

You can also upload files to MR8' repositories within the Production module. This can save time if you already know which entry uploaded files should be associated with (for example, you already know the case name or order number). See "Uploading files in Production."

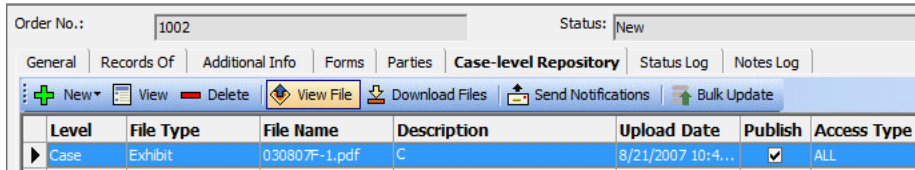
Create canned file descriptions in **Setup > Repository Descriptions**. See "Setting up canned file descriptions."

Repository

Viewing files

You can view the contents of any uploaded file as long as you have a program that can open the file. (See note.)

1. In any detail window that has a **Repository** tab, click the tab.
2. With the file you want to view selected, click the up arrow (**View File**) button.



3. You can also view any file from its detail screen by clicking the up arrow button next to **File Name**.



View File button



TIPS

To see which contacts can access a file or files on RB Web, select the file(s), then click **Web Accessibility**.

You can also view files across the entire central repository in Production. See “Searching for and viewing archived files.”



NOTE

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.

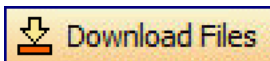
To find out how to register or change the file association, refer to *Microsoft Windows’ Help*.

Repository

Downloading files

Sometimes you might have to download a file from the repository to email to a client who does not have web access.

1. In any detail window that has a **Repository** tab, click the tab.
2. With the file you want to download selected, click the down arrow (**Download Files**) button. You can also download any file from its detail screen by clicking the down arrow button next to **File Name**.



Download Files buttons

3. In the Browse for Folder window, locate the folder you want to download the file to.
4. Click **OK**.

Chapter 3: Getting Started

The most important, yet often overlooked, step in implementing MR8 is the Setup step. MR8 is a complex database application containing more than 130 tables that are interconnected like a spider web. The more thought and time you put into the setup, the more efficient your operation will be. Take your time. Do not hurry through this critical part of your MR8 deployment.

Learn how to set up and use MR8 as you prefer. Set up your company, client and location information. Customize service item lists. Set up billing sets to make billing more accurate and efficient. Create form packages to speed up the document printing process.

Functions covered in this chapter:

Setup Workflow

Form Manager

Code Manager

Chart of Accounts

Business Units

Users and Groups

User Preferences

System Preferences

Service Items Subgroups

Service Items Master

Billing Rate Groups

Billing Rates

Billing Sets

Invoice Headers

Invoice Messages

Firms

Contacts

Locations

Tracking Steps

Scopes

Repository Descriptions

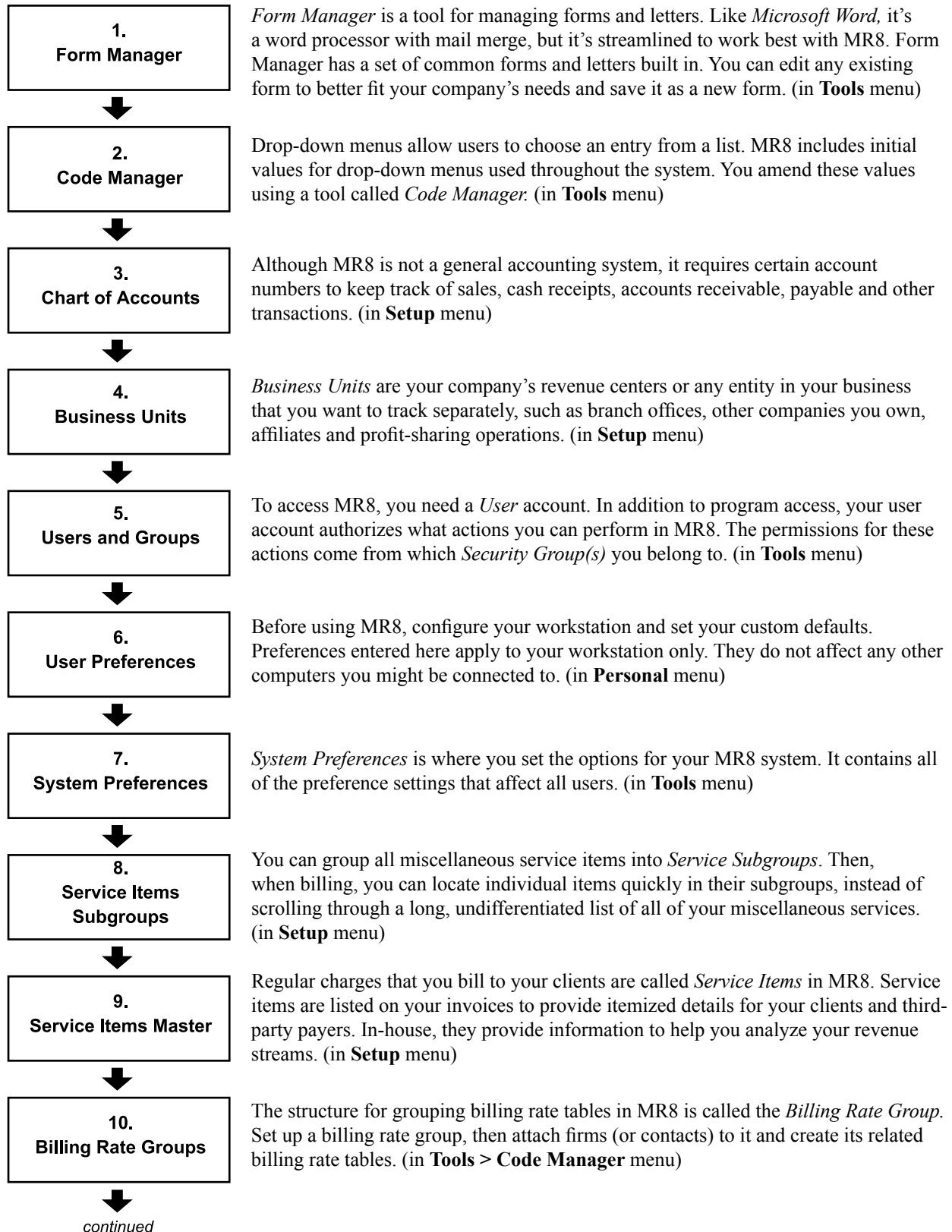
Form Data Source Templates

Form Packages

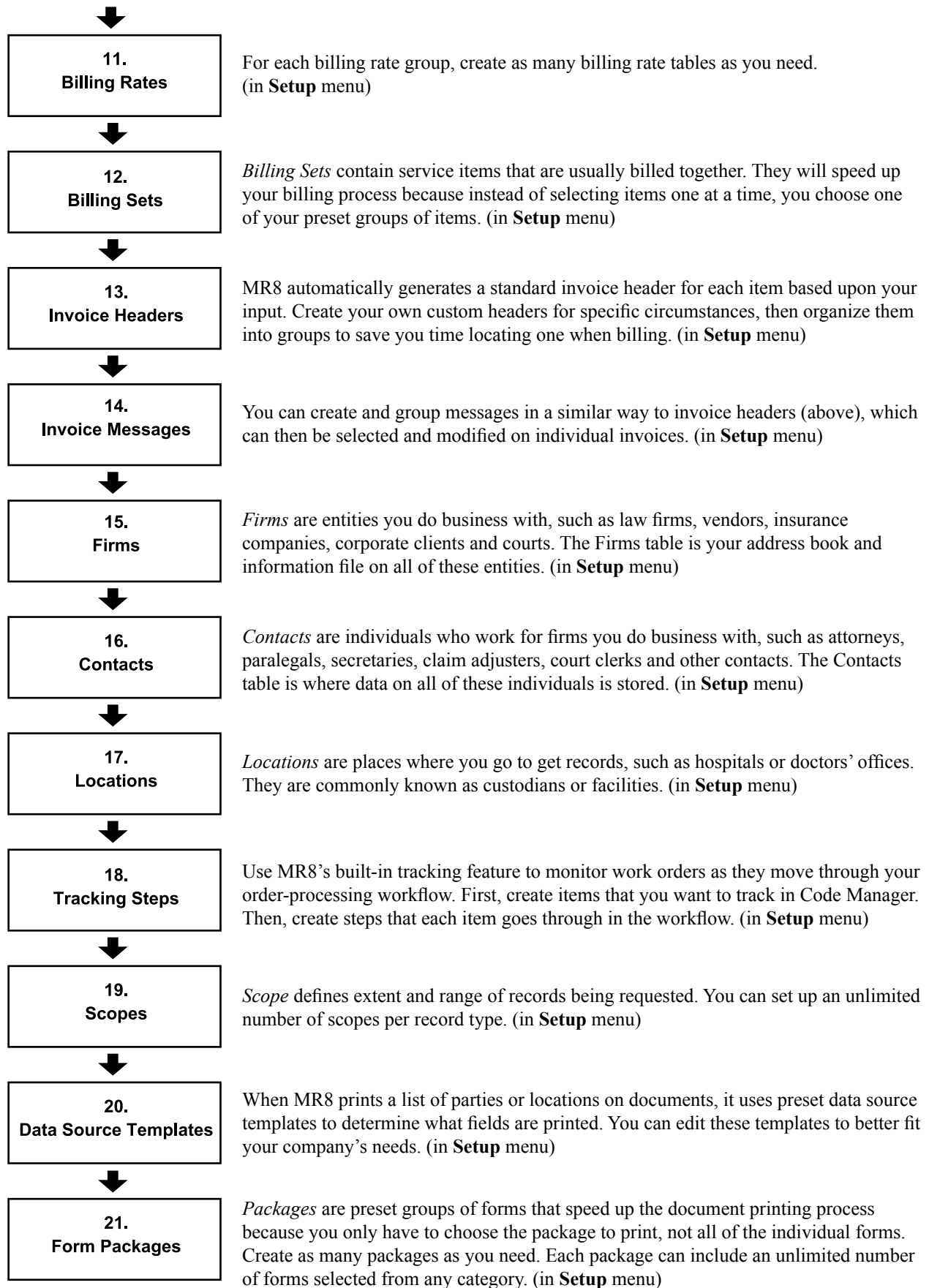


Set-up procedures suggested order

Before using MR8, you must enter information about your company, clients, locations, billing rates, and other default information in the appropriate Setup tables. This flow chart suggests an optimum order to entering information, but you can enter or change information in any Setup table at any time.



continued



Form Manager

Form Manager is a tool for managing forms and letters. Like *Microsoft Word*, it's a word processor with mail merge, but it's streamlined to work best with MR8.

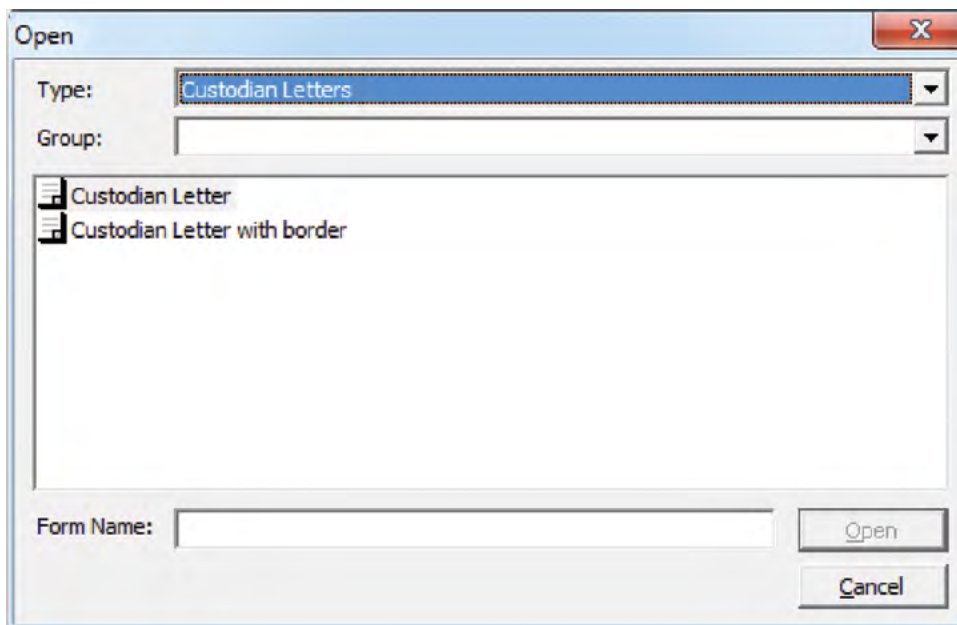
It's also smart: Instead of listing every available MR8 data field for you to scroll through, its *Data Source Manager* lets you select a form type, such as custodian letters or confirmations. Then it only displays fields related to that type, logically grouped into folders, so you can quickly find a specific merge field.

Form Manager

Creating forms and letters from templates

Form Manager has a set of common forms and letters built in. You can edit any existing form to better fit your company's needs and save it as a new form.

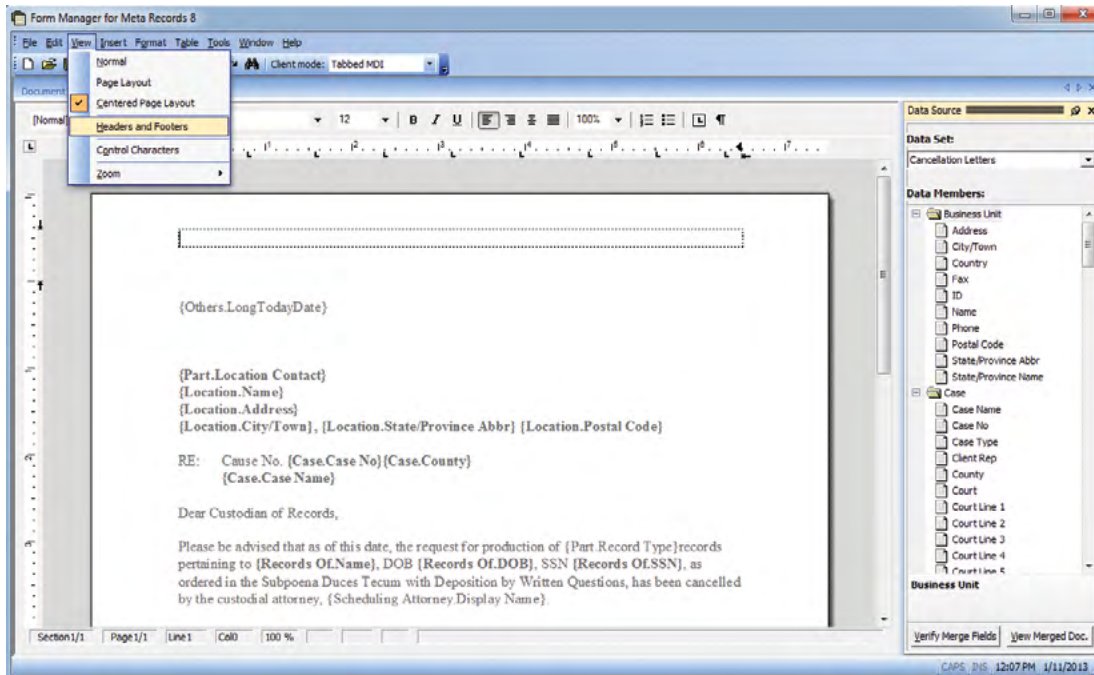
1. On the menu bar in MR8, click **Tools > Form Manager**.
2. Click **File > Open**.
3. Form templates are organized in groups. Select a category in the **Type** drop-down, then select an individual form and click **Open**.



4. The form opens on the left in a *Word*-like interface. You can make changes in formatting, text, layout, etc. as you would in *Word*.
5. On the right side of the screen, the Data Source Manager lists merge data fields that are appropriate for the current form type. To add a field to the form, insert your cursor in the form where you want the new information, then double-click the field name under **Data Members**. The merge field name appears in the form surrounded by curly brackets {}.
6. Repeat step 5 for all of the fields you want to insert.

Getting Started

- To remove a data field from the form, move the cursor over the field in the form. The cursor changes to a hand. Click to highlight, then press **Del**.
- To add or edit a form's header and footer, select **View > Headers and Footers**. You can add merge data fields into the header or footer as in the rest of the form.



- To edit header and footer properties such as their distance from the page border, click the **Header and footer properties** button. To switch focus between the header and footer fields, click the **Switch between header and footer** button.



Header and footer properties



Switch between header and footer

- To change the company logo or other graphic, see “Adding your company logo.”
- Click **File > Save As**, then enter your new form's name in the **Form Name** field and click **Save**.



IMPORTANT

Selecting **Save As** saves the new form with a new name and does not overwrite your existing form.



TIP

In the Data Source Manager, the **Data Set** drop-down lists the different groups of data fields. If you are working with an existing form, the **Data Set** drop-down automatically opens the correct set of data fields for the form. Do not select fields from other data sets. The data set must match the form type you are working with in the left pane. Click **Verify Merge Fields** to check that the merge fields on the form belong to the appropriate data set and will work on the form. Click **View Merged Doc** to see a preview of the document.

Form Manager

Adding your company logo

Sometimes all you need to do with the default MR8 forms is add your company logo.

1. With the form you want to update open in Form Manager, insert your cursor where you want to add your company logo or other graphic.
2. If you want to remove an existing graphic, click the image to highlight, then press **Del**.
3. Click **Insert > Image**, locate your new graphic and click **Open**.
4. Right-click on the image, then click the **Saving Options** tab.
5. Under Saving Style, click **Export image and embed file reference**. Click **OK**.



NOTE

Images used in Form Manager must be under 1MB in file size.



TIP

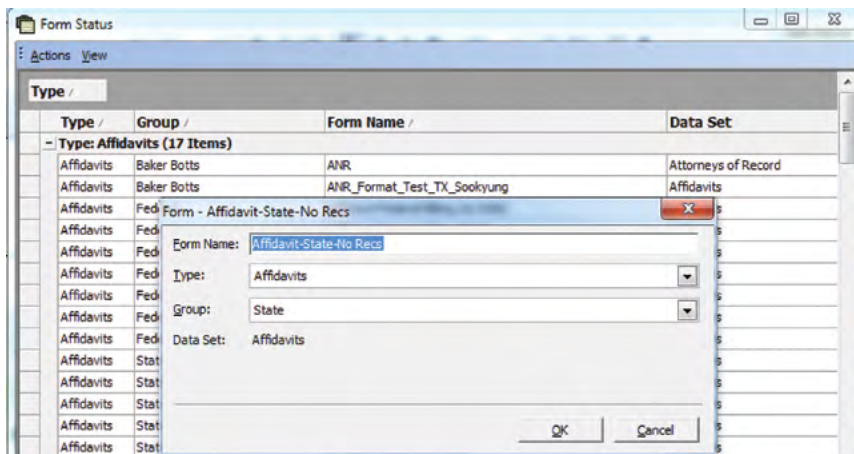
Smaller image file sizes result in faster performance.

Form Manager

Deleting or reclassifying forms

In MR8's Form Manager, you can delete forms you no longer need and change other forms' name, form type and/or form group.

1. In MR8, click **Tools > Form Manager**.
2. In Form Manager, click **Tools > Change Form Status**.
3. In the Form Status window, click the form you want to delete or reclassify to highlight it.
 - **To delete the form**, right-click the highlighted form and click **Delete**, then click **Yes**.
 - **To reclassify the form**, double-click it. In the Form pop-up window, edit the name in the **Form Name** field, and/or select a new **Type** or **Group** in the corresponding drop-downs, then click **OK**.



WARNING

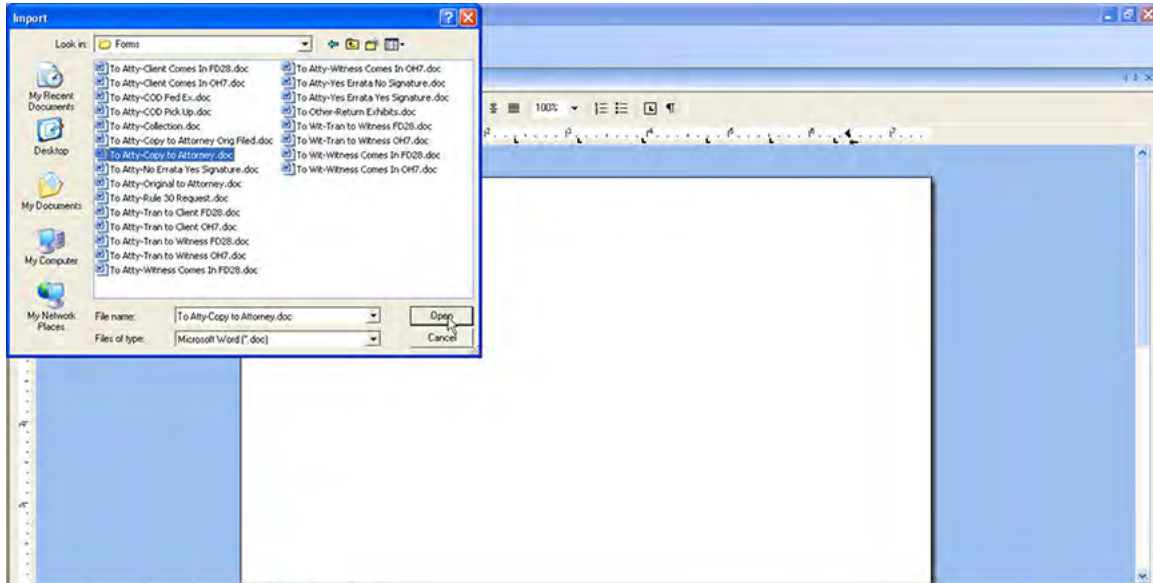
Changes made using **Change Form Status** are system-wide.

Form Manager

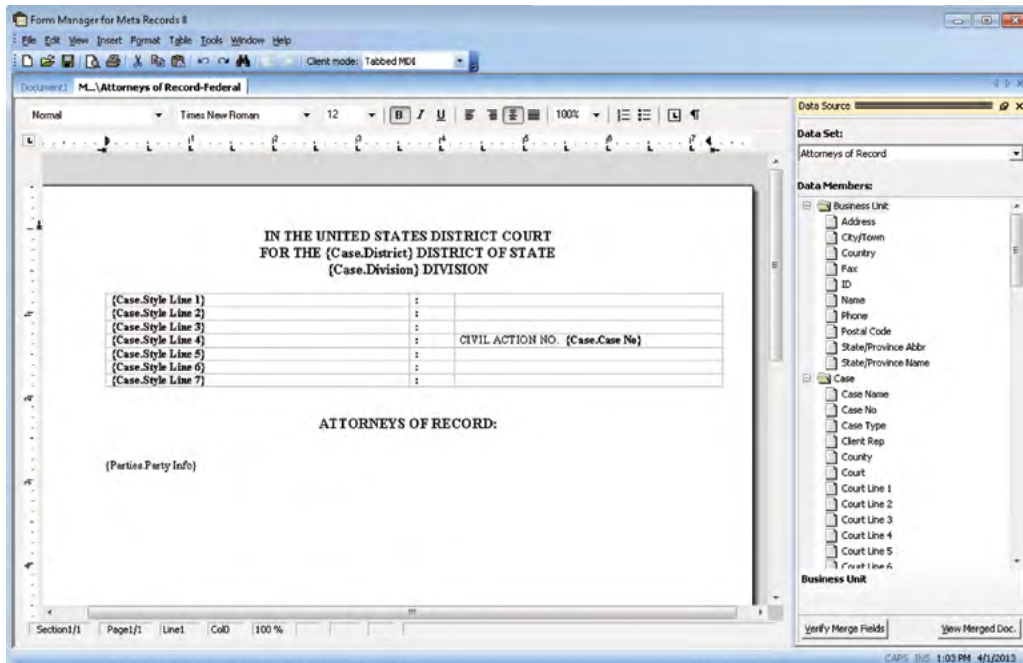
Importing your own forms into MR8 Form Manager

If you already have forms that you created as Word documents, you can easily add them to your MR Form Manager.

1. In MR8, click **Tools > Form Manager**.
2. Click **File > Import**.
3. Locate the form you want to import (preferably a .doc file) and click **OK**.



4. Click **Tools > Data Source Manager**. In the Data Source Manager, select the type of form you are importing in the **Data Set** drop-down.

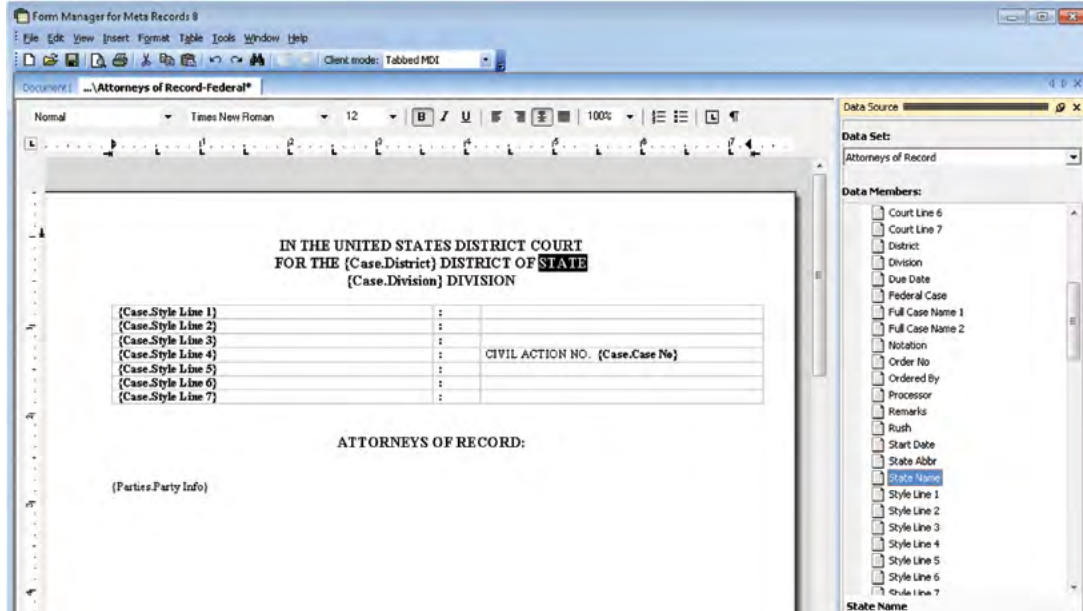


NOTE

You can import other document types besides Word docs, such as .form, .htm, or .rtf, but their formatting might change when you open them in Form Manager, requiring some editing.

Getting Started

- The appropriate merge fields appear in the Data Members window. Highlight data in your form that has a corresponding data member field, then double-click its **Data Members** field name in the Data Source Manager to change the selected text in your form into a merge field.



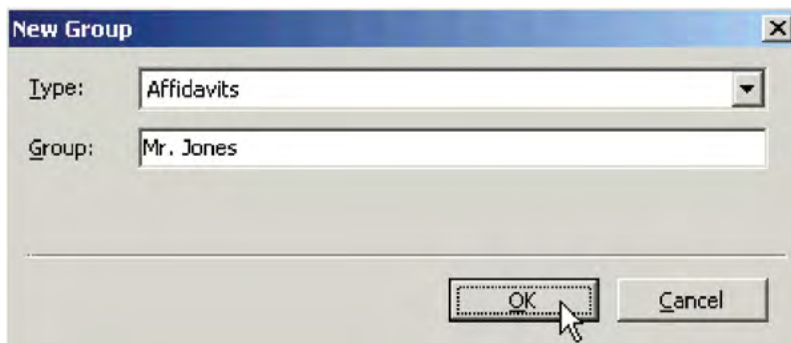
- Repeat step 5 to add all of your merge fields to the form.
- When finished, click **File > Save As**.
- In the Save As dialog box, select a form group (if applicable) in the **Group** drop-down (see “Creating form groups”) and enter your form’s name in the **Form Name** field and click **Save**.

Form Manager

Creating form groups

You can group documents by category to make maintenance easier. Form Manager comes with a default set of document categories, which you can amend.

- In the Form Manager window, click **Tools > Group Manager**.
- In the Group Manager window, all existing groups (categories) appear. Right-click on the grid, then choose **New**.
- In the New Group window, select a category in the **Type** drop-down, then enter the group name.



- Click **OK**.

Code Manager

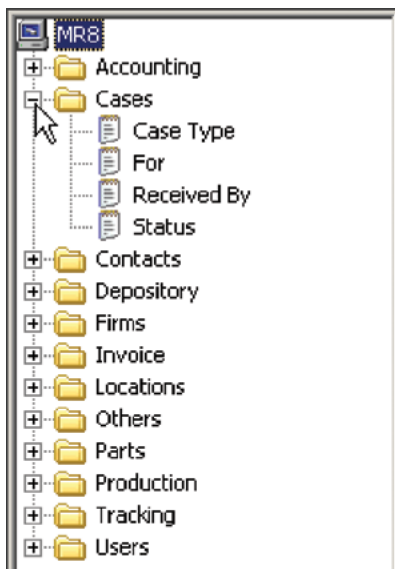
Drop-down menus in MR8 allow users to choose an entry from a list, which appears immediately below a selected field and displays available values. MR8 includes initial values for drop-down menus used throughout the system. You amend these values using a tool called *Code Manager*.

Code Manager

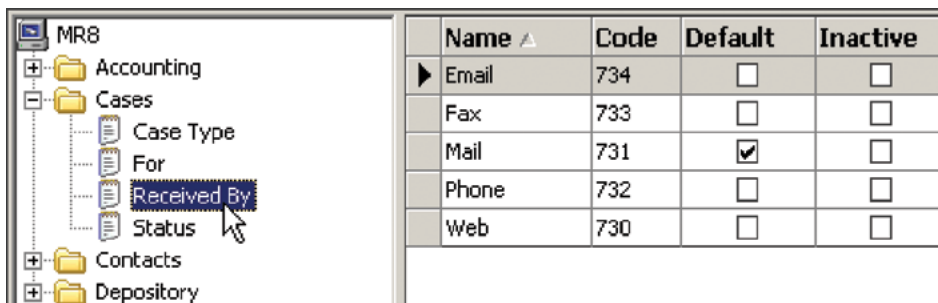
Adding drop-down entries

Use Code Manager to customize MR8 drop-down lists to fit your business.

1. On the menu bar in MR8, click **Tools > Code Manager**.
2. On the left side of the Code Manager window, folders appear representing the main categories. Click the “+” next to a folder (or double-click the folder) to open the folder, displaying its subcategories underneath.

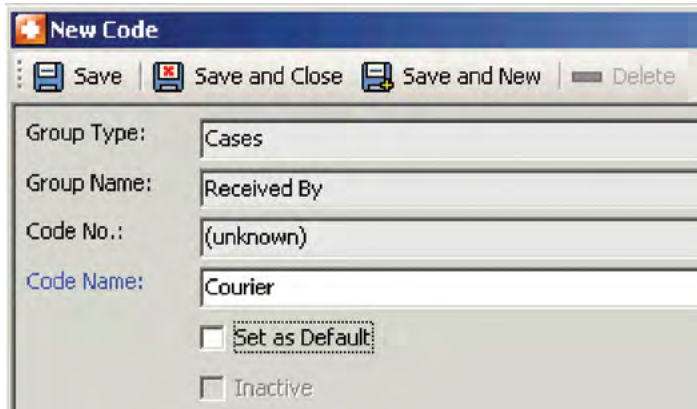


3. Click a subcategory to display all of the values entered so far as a grid in the Results (right) pane.



4. To add a new code, click **Actions** (or right-click on the grid), then choose **New**.

- In the New Code window, **Code No.** is not an input field and is generated by the system automatically when you save. Enter the following information:
 - Code Name (required)** – Enter the description for this code. You can leave this field blank to add a code with no description.
 - Set as Default** – Check this box to make the code appear as the default choice.
 - Show on MRWeb** – Check this box to have this entry’s system code and file type appear in MR Web repository listings.



- Click **Save and Close**.

Code Manager

Removing drop-down values

There are two ways to remove codes from MR8 when you no longer need them: deleting or de-activating. You can delete any code as long as it is not required by MR8 or there are no records associated with it.

If MR8 does not allow you to delete a code you set up because it is in use, make it *inactive* instead. Inactive codes do not appear in drop-downs when you are creating new records.

To delete a code:

If the code is not an MR8-required code or has no records associated with it, select it in the Code Manager Results pane, then click **Actions > Delete**.

To de-activate a code:

- Right-click the code in the Code Manager Results pane, then choose **View**.
- Check **Inactive**.



- Click **Save and Close**.



NOTE

If you select an MR8-required code and click **Actions**, or right-click the code, **Delete** appears grayed out and is disabled.

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). Although MR8 is not a general accounting system, it still needs certain account numbers to keep track of sales, cash receipts, accounts receivable, payable and other transactions. MR8 requires the following accounts and assigns them these default numbers:

MR8-required default account numbers

	Account No.	Account Name	Account Type	Inactive
▶	1000	Checking	Bank	<input type="checkbox"/>
	1100	Accounts Receivable	Accounts Receivable	<input type="checkbox"/>
	2000	Refunds	Current Liability	<input type="checkbox"/>
	4000	Revenue	Income	<input type="checkbox"/>
	4100	Finance Charge Revenue	Income	<input type="checkbox"/>
	5000	Custodian Expenses	Expense	<input type="checkbox"/>
	5100	Discount Expenses	Expense	<input type="checkbox"/>
	5200	Bad Debt Expenses	Expense	<input type="checkbox"/>

Chart of Accounts

Adding accounts

You can add accounts to MR8's list of required accounts to customize MR8 to your business.

1. On the menu bar in MR8, click **Setup > Chart of Accounts**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Account window, enter the following information:
 - **Account Type** – Select an account type in the drop-down.
 - **Account No. (required)** – Enter the number for this account. (See Best Practices at the end of the Chart of Accounts section.)
 - **Account Name (required)** – Enter the name for this account.

4. Click **Save and Close**.

Chart of Accounts

Removing accounts

There are two ways to remove accounts from MR8 when you no longer need them: deleting or de-activating. You can delete any account as long as it is not an MR8-required account (see “Chart of Accounts”) or there are no records associated with it.

If MR8 does not allow you to delete an account you set up because it is in use, make it *inactive* instead. The account remains in your MR8 database, but it no longer appears in drop-downs or reports.

To delete an account:

If the account is not an MR8-required account or has no records associated with it, select it in the Chart of Accounts window, then click **Actions > Delete**.

To de-activate an account:

1. Right-click the account in the Chart of Accounts window, then choose **View**.
2. In the account detail window, check **Inactive**.



3. Click **Save and Close**.

Chart of Accounts

Editing accounts

You can change the name of an account, but not the account number. If you want to change an account number, you must delete it first, then add it as a new account. (See “Removing accounts.”)

1. With the account selected in the Chart of Accounts window, click **Actions > View**; or right-click the account, then choose **View**.
2. Edit the name in the detail window.



BEST PRACTICES

As you enter accounts, group them according to type by assigning them numbers within a set range for each type. For example, assign all asset-type accounts four-digit numbers that begin with “1.” Check with your accountant before finalizing the way you use numbers, but the example presented below is a common approach.

1xxx	Assets
2xxx	Liabilities
3xxx	Equity
4xxx	Income
5xxx	Expenses
6xxx	Expenses
7xxx	Expenses
8xxx	Expenses
9xxx	Other Income and Expenses

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.

Business Units

Setting up business units

Add your company's revenue centers to MR8 as different business units, so you can track and report their activities separately.

1. On the menu bar in MR8, click **Setup > Business Units**.
2. Click **Search**. Any business units already set up appear in the right-side grid.
3. Double-click an existing unit to update its information. Or right-click on the grid, then choose **New** to add a unit.
4. In the Business Unit-[name]/New Business Unit window, the **General** tab is automatically selected. Edit/enter the business unit ID, name, address and phone numbers. For the business unit ID, enter an abbreviation that is concise and meaningful. (See Best Practices at the end of this section).

Business Unit ID: HOU-REC

General | Additional | Preferences | Accounts

Name: OMTI Records Services

Address: 2901 Wilcrest Drive, Suite 211

City/Town: Houston State/Province: Texas

Postal Code: 77042 Country: United States

Phone: 832-203-6083 Fax: 832-203-6088



TIP

You do not need to enter the **City/Town**, **State/Province** or **Country**. Enter the **Postal Code** (zip code), and press the **Tab** key, then the **Enter** key. Or click the binoculars button. MR8 will automatically populate the other address fields correctly.

5. Click the **Additional** tab. Enter your web address and tax ID number. In the **Remit To** drop-down, choose the business unit to be displayed in the remittance section of invoices and statements, and select terms in the **Payment Terms** drop-down.



BEST PRACTICES

While you can have hundreds of business units in MR8, we recommend setting up as few as possible because a large volume of BUs will slow down your work processes in two ways:

1. When designating a business unit, you must scroll through your list of BUs in the drop-down to find one.
2. If you select more than 200–250 BUs, MR8 cannot process the request. The “Too many items are selected on BU” alert will appear.

6. Click the **Preferences** tab. Enter the following information:
 - **Order due in** – Number of calendar days orders are due in (for regular deliveries).
 - **Late charge in** – 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 “Setting up firms” for information on entering late charge percentages.)
 - **Print name and addresses on invoices/Print name and addresses on statements** – Check these boxes to have your company name and address appear on your invoices and statements.
 - **Do not show when number of unit is one** – Check this box if you want to hide the number of units on invoices for any service item that you are only billing one unit of (*this is MR’s default*). Uncheck this box if you always want to show the number of units being billed, even when it is a single unit.
 - **Show rate per unit when detailed** – Check this box if you want to show rates of all service items billed on detailed invoices.
 - **Preprinted Invoice** – Check this box if you have preprinted invoice forms. MR8 will print information only, no boxes or lines.
 - **Preprinted Statement** – Check this box if you have preprinted statement forms. MR8 will print information only, no boxes or lines.
7. Click the **Accounts** tab. In each drop-down, choose the appropriate account number. (See “Chart of Accounts.”)
8. If this is a new business unit, click **Save**. In the MR8 pop-up window, click **Yes** to allow all users access to this business unit or **No** to deny access. A new tab, **Logo Image**, appears.
9. Click the **Logo Image** tab. Check that your logo file conforms to the instructions below the image field, then click **Upload Image**.
10. Locate and select the JPEG file you want to appear as your company logo on invoices and statements. Then click **Open**.
11. Click **Save and Close**.



BEST PRACTICES

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:

HOU-REC	Houston – Records
HOU-PS	Houston – Process Serving
DAL-REC	Dallas – Records
DAL-PS	Dallas – Process Serving
AUS-REC	Austin – Records
AUS-PS	Austin – Process Serving



TIPS

A quick way to add more business units is to copy (replicate) an existing business unit:

1. On the business unit list, right-click a business unit to copy from, then choose **Copy**.
2. Modify only those fields that are different, including the business unit ID. Then click **Save and Close**.

If you close an office or re-organize and want to remove a business unit, but keep its data, right-click the business unit, then choose **Merge To**. In the Merge Business Unit window, double-click the business unit you want to add the closing business unit’s historical data to. In the MR8 pop-up window, click **Yes**.

Users and Groups

To access MR8, you need a *User Account*. In addition to program access, your user account authorizes what actions you can perform in MR8. (See “Creating user accounts.”)

The permissions for these actions come from which *Security Group(s)* you belong to. A user must be a member of at least one security group. The permissions and rights granted to a security group are assigned to its members. (See “Creating security groups.”)

In addition to security groups, MR8 also includes *Message Groups*, so you can send a message to all the members of a group simultaneously; and *Alert Groups*, who receive automatic notices from the system when specific events occur, such as a backup failure. (See “Creating new message groups” and “Adding members to alert groups.”)

Users and Groups is the tool you use to manage MR8 users and groups.

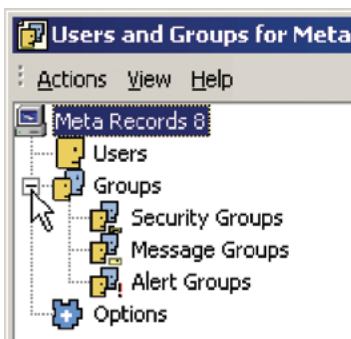
Users and Groups

Creating security groups

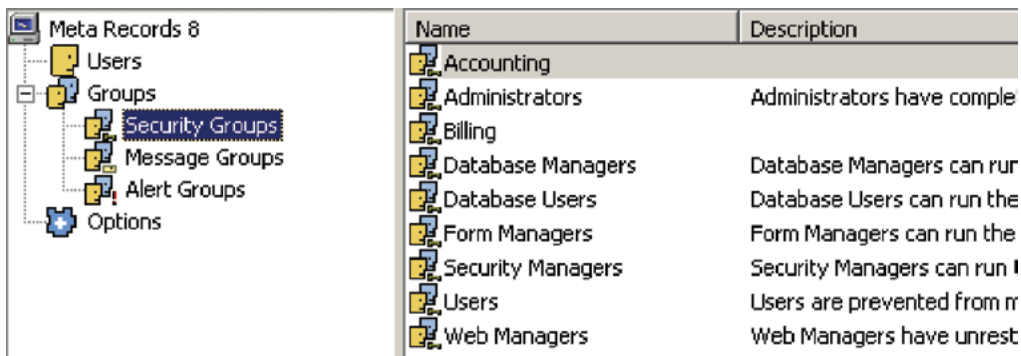
An important security feature of MR8 is the ability to limit groups to performing only the actions for which you assign them rights and permissions. Assign permissions to security groups first, then add users to the groups. Belonging to a security group gives a user rights and abilities to perform various tasks.

Default security groups are included when MR8 is initially installed. These built-in groups have been granted useful collections of rights and permissions. In most cases, built-in groups provide all the capabilities needed by a particular user.

1. To add a new security group, click **Tools > Users and Groups** on the MR8 menu bar.
2. On the left side of the Users and Groups window, icons appear representing the main categories. Click the “+” next to **Groups** (or double-click **Groups**) to expand the level, displaying its subcategories underneath.



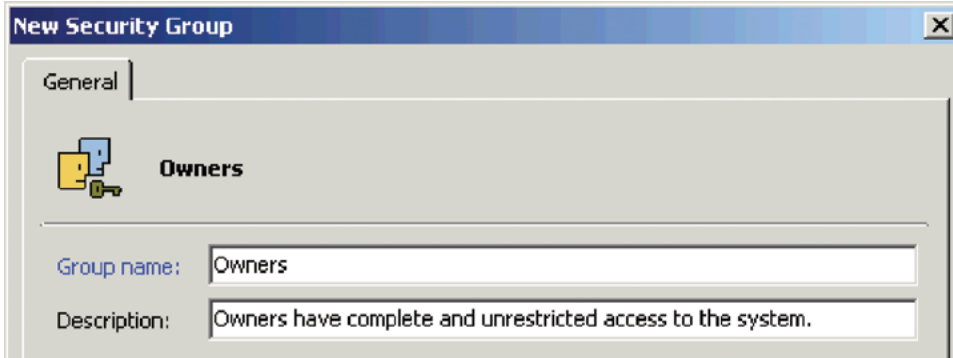
3. Click **Security Groups** to display all of the existing security groups in the Results (right) pane.



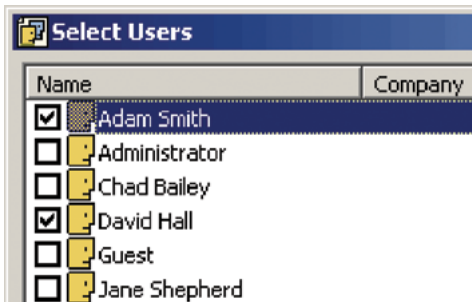
4. Click **Actions** (or right-click **Security Groups**), then choose **New Security Group**.



5. In the New Security Group window, enter the group name and a description.



6. Click **OK**.
7. Double-click the group you've just created, then click **Add**.
8. In the Select Users window, check all the users belonging to this group, then click **OK**. (To add more users to the Select Users window, see "Creating user accounts.")



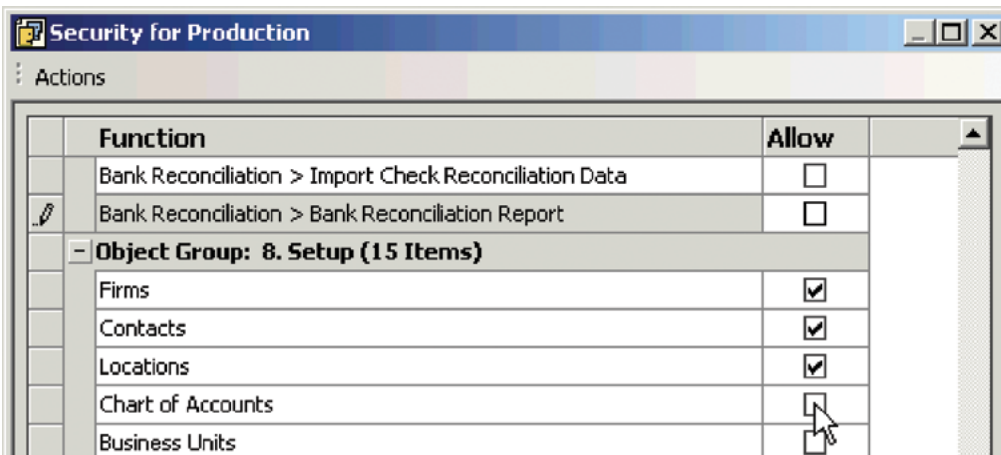
TIP

You can make changes to a group by double-clicking it and revising any fields in the [group name] Properties window.

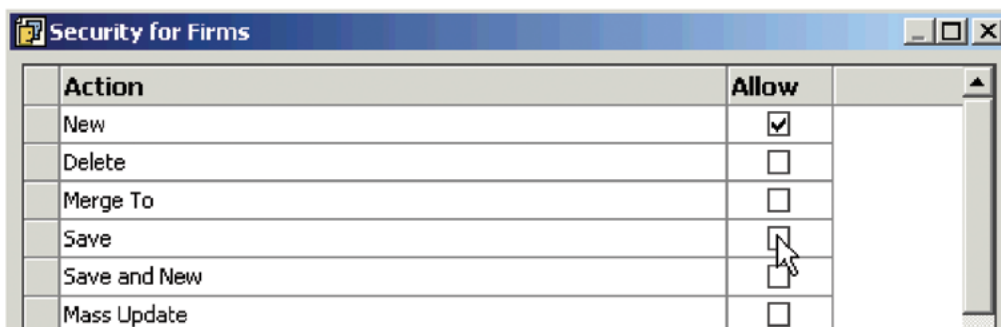
Setting security permissions

After adding all the members to a new security group, the next step is to set the group's security permissions. Permissions have two levels: First, give a group permission for a specific MR8 function, such as Firms access. Second, give the group permission for specific actions within that function. For example, if you want your production department to be able to view firm information, but not edit it.

1. Right-click the group you want to set security permissions for, then choose **All Tasks > Change Security**.
2. In the Security for [group name] window, all the functions that are available on the menu bar in MR8 appear. Check the **Allow** box next to each function to either grant or deny permission.



3. After setting this first level of security settings for the group, double-click an allowed function.
4. In the Security for [function name] window, all the actions that are available for the function are listed. Check the **Allow** box next to each action to either grant or deny permission.



5. Click **OK**. Repeat steps 2 through 4 for each function.



TIP

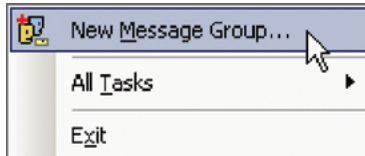
After entering all the security settings for one security group, use **All Tasks > Copy Security Settings and Paste Security Settings** to speed setting up other security groups.

Users and Groups

Creating new message groups

In MR8's Message Center, you can send messages to individual users and/or message groups. (See "Communicating within MR8.") Set up groups such as "Managers," "Everyone" and "Client Reps" so that you can send a message to many people at the same time.

1. On the left side of the Users and Groups for MetaRecords 8 window, click the "+" next to **Groups** (or double-click **Groups**), then **Message Groups** to display all of the existing message groups in the Results pane.
2. Click **Actions** (or right-click **Message Groups**), then choose **New Message Group**.



3. In the New Message Group window, enter the group name and a description.
4. Click **OK**.
5. Double-click the group you've just created, then click **Add**.
6. In the Select Users window, check all the users belonging to this group, then click **OK**. (To add more users to the Select Users window, see "Creating user accounts.")

Users and Groups

Adding members to alert groups

Alert groups are sets of users who should be notified in the case of an alert, such as a backup failure. Alert groups are preset by the system, so you cannot create new alert groups. However, you can add or remove alert group members.

1. On the left side of the Users and Groups for MetaRecords 8 window, click **Groups**, then **Alert Groups** to display the alert groups set up by the system in the Results pane.
2. Double-click an alert group you want to modify, then choose **Add**.
3. In the Select Users window, check all the users belonging to this group, then click **OK**. (To add more users to the Select Users window, see "Creating user accounts.")



NOTE

Alerts are sent via MR8's Message Center, the internal email-like system used for both custom and automatic messages between your MR8's users. See "Communicating within MR8."

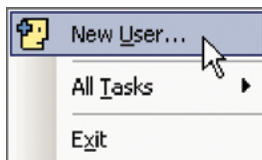
Creating user accounts

Set up user accounts for everyone who needs to access MR8 and assign them to security groups that give them permissions to only the actions they need to perform. Individual users can be members of multiple security groups, so if you have employees whose responsibilities overlap different areas, such as someone who oversees both orders and billing, you can give that person access to both areas through membership in different security groups.

1. On the menu bar in MR8, click **Tools > Users and Groups**.
2. On the left side of the Users and Groups window, icons appear representing the main categories. Click **Users** to display the two built-in user accounts, Administrator and Guest, as well as any user accounts you have created so far in the Results (right) pane.



3. Click **Actions** (or right-click **Users**), then choose **New User**.



4. In the New User window, enter the full name of the user as you want it to appear in MR8 in the **Display name** field. Other fields are optional. If this user is a sales rep, enter a rate (e.g., 7.000) in the **Commission Rate** field.

New User

General | Address | Account | Telephones | Organization | Notes

Michael Smith

First name: Initials:

Last name:

Display name:

Description:

5. Click the **Account** tab and enter the **User logon name**. To be consistent, we recommend that you use the first four letters of the last name plus the first two letters of the first name.

- In **Password** and **Confirm password**, type a *strong* password containing up to 14 characters. (See Best Practices below.)

New User

General | Address | Account | Telephones | Organization | Notes

User login name: smitmi

Password: *****

Confirm Password: *****

- Click **OK**.



BEST PRACTICES

For a password to be strong, it should:

- Be at least seven characters long.
- Contain letters, numbers and symbols.
- Have at least one symbol character in the second through sixth positions.
- Not contain your name or user name.
- Not be a common word or name.

- Double-click the user account you've just created. Two new tabs – **Member Of** and **BU** – appear.
- Click the **Member Of** tab, then click **Add**.
- In the Select Groups window, check all the groups this user should be a member of, then click **OK**.
- Click the **BU** (Business Units) tab, then click **Add**.
- In the Select Business Units window, check all the business units (revenue centers) this user should have access to, then click **OK**.

BU ID	BU Name	BU City
<input type="checkbox"/> CC	Super Fast Records, Inc.	Corpus Christi
<input checked="" type="checkbox"/> DAL	Super Fast Records, Inc.	Dallas
<input checked="" type="checkbox"/> HOU	Super Fast Records, Inc.	Houston



BEST PRACTICES

Members of the Administrators group have full access rights and permissions, so you will want to limit the number of users in that group.

After setting up your user accounts, disable the Guest account. To do this, right-click **Guest** in the Results pane, then click **All Tasks > Disable Account**.



TIP

If MR8 does not allow you to delete a user account because it has records attached to it, disable the user account instead. Deleted or disabled user accounts do not appear in the Select Users window when you are adding new users to a group.

Configuring your workstation

Before using MR8, configure your workstation and set your custom defaults. Preferences entered here apply to your workstation only. They do not affect any other computers you might be connected to.

1. On the menu bar in MR8, click **Personal > User Preferences**.
2. In the User Preferences window, the **Log On** tab is the default. Specify the following information:
 - **Server** – The name (or the IP address) of the server on which the MR8 Server is installed.
 - **Network Libraries** – The network protocol used to connect to the MR8 Server. TCP/IP is the default. A network protocol is the language your computer uses when communicating over the network.
3. Click the **Message Center** tab to specify your Message Center preferences, such as message format and whether to save copies of outgoing or deleted messages. See “Communicating within MR8.”
4. Click the **Reports** tab to specify the business unit to show on report headers.
5. Click the **Email** tab to specify the protocol you use to send emails out. SMTP is strongly recommended.
6. Click the **Business Unit** tab to specify the default business unit. This is used mainly in entering new cases. (See “Business Units.”)
7. Click the **Printers** tab. Select a printer to be used for printing each item in its drop-down. If left blank, the default printer defined in *Windows* on your workstation is used.
8. Click the **Database** tab. Specify how long to wait (in seconds) before MR8 terminates queries issued to the SQL Server. The default is 30 seconds.



TIP

If you get time-out messages when running reports or searches in MR8, increase this wait time by selecting a higher number in the **Command Timeout** drop-down on the **Database** tab.

9. Click the **Spell Checker** tab to specify your spelling check preferences.
10. Click the **Invoice** tab and select an invoice template in the drop-down. (See Tip below.)
11. Click the **Statement** tab and select a statement template in the drop-down. (See Tip below.)
12. Click the **Summary Invoice** tab and select an invoice template in the drop-down. (See Tip below.)



TIP

You can print invoices without the Order Date by selecting one of the “w/o Order Date” options in the **Select an invoice format** drop-down.

If you want to print statements and/or summary invoices without the Order Date, select one of the “w/ Client Matter No.” options in their respective drop-downs.

13. If your company uses MR8’s default fax server instead of an internet fax service like eFax.com, click the **Fax** tab to enter an IP address for the fax server.

14. Skip the **SMS** tab unless you want to specify settings for text message delivery receipt.
15. Click the **Firms** tab to enter the default settings for new firms.
16. Click the **Clipboard** tab to enter the maximum clipboard count. MR8's clipboard allows copying an entity from a data grid in one window and pasting to the same type of entity's lookup field in another window. You can select to have up to 10 clipboards at a time.
17. Click the **Payments** tab to add or remove credit cards for custodian fees:
 - **To add a credit card**, click **Add**, enter the credit card number in the New Credit Card pop-up window, then click **OK**.
 - **To remove a credit card**, click the card to highlight it, then click **Remove**.
18. Click **OK**.

System Preferences

Configuring global options

System Preferences is where members of the MR8 Administrator security group set the options for your company's MR8 system. It contains all of the preference settings that affect all MR8 system users.

1. On the menu bar in MR8, click **Tools > System Preferences**.
2. In the System Preferences window, click the **Case Settings** tab and specify a color for each case status. Also enter a starting order number.



NOTE

When defining a **Starting Order Number**, be aware that order numbers can only increase as orders are set. You cannot at a later time re-set the starting order number lower.

3. Click the **Part Settings** tab and specify a color for each part (work order) status.
4. Skip the **SMS Server** tab. SMS text messaging is automatically set up in MR8, so you do not have to fill out these fields.
5. Click the **Invoice** tab and specify the following information:
 - **Invoice Options** – Check the appropriate boxes. We recommend that you keep **Always check Archive option** checked so that invoices are automatically archived to your MR8 central repository. **Print toner save mode** turns off the gray background when invoices are printed.
 - **Subject** – Enter text that will appear in the Subject line when you send invoices via email. Click **Actions > Add Data Field** to insert merge fields into the text.
 - **Message** – Enter text that will appear in the Message box when you send invoices via email. Click **Actions > Add Data Field** to insert merge fields into the text.
 - **Starting Invoice No.** – Enter a starting invoice number. It is recommended that you keep the order number and invoice number far enough apart so that they will never overlap. Like order numbers, invoice numbers can only increase as invoices are created. You cannot at a later time re-set the starting invoice number lower.

6. Click the **Statement** tab and specify the following information:
 - **Statement Options** – Check **Print Recipient’s Phone No. and Fax No.** box to print the recipient’s phone and fax number on monthly statements. **Print toner save mode** turns off the gray background when statements are printed.
 - **Subject** – Enter text and select merge fields that will appear in the Subject line when you send statements via email.
 - **Message** – Enter text and select merge fields that will appear in the Message box when you send statements via email.
7. Click the **Summary Invoice** tab and check **Print Recipient’s Phone No. and Fax No.** box to print the recipient’s phone and fax number on summary invoices. **Print toner save mode** turns off the gray background when invoices are printed.
8. Click the **Message Center** tab to specify the number of days the unread, sent and deleted messages will be kept. See “Communicating within MR8.”
9. Click the **Repository Server** tab to log and track all file download activities (required by HIPAA rules) performed by in-house staff as well as by clients. Check **Log internal usage of repository files** to activate. See “Tracking inhouse and online repository access.”
10. If you have the MR8 Reward Points plug-in, click the **Points System** tab. Contact OMTI Support for help filling out this tab.
11. Click the **Worksheet** tab and specify the following information:
 - **Subject** – Enter text that will appear in the Subject line when you send runner (field agent) worksheets via email. Click **Actions > Add Data Field** to insert merge fields into the text.
 - **Message** – Enter text that will appear in the Message box when you send runner (field agent) worksheets via email. Click **Actions > Add Data Field** to insert merge fields into the text.
12. Click the **Assemble Court - Federal** tab to modify the (default) template that determines how the court style is printed on documents for federal cases.
13. Click the **Assemble Court - State** tab to modify the (default) template that determines how the court style is printed on documents for state cases.
14. Click the **Assemble Court - Other** tab to modify the (default) template that determines how the court style is printed on documents for local cases.
15. Click the **Shipping** tab to enter your company’s UPS and/or FedEx account information for creating shipping labels. If you need instructions for setting up/finding the appropriate information to enter, click the hyperlinks on the tab.
16. Click the **Fax** tab. Under Faxing Method, choose:
 - **OMTI Fax Server** – MR8’s default internal fax server.
 - **Online (Internet) Fax Service** – If you contract with an online fax service provider, select the service in the drop-down list, then enter the settings you received from them when you signed up.
17. Click the **Holidays** tab. To exclude a holiday from the business days available for processing parts, check the holiday’s **Active** box. By default, no holidays are selected.

18. Click the **Others** tab to specify whether you want to omit a comma after the city name in displaying all addresses.
19. Click **OK**.



TIP

You can add merge fields to the templates on the **Assemble Court - Federal/State/Other** tabs. The available merge fields are listed below each template's text fields. To have the merged text appear in all capital letters on the documents, use guillemets, << >>, to enclose the merge field name. To have the data appear as entered, use double curly brackets, {{ }}, to enclose the merge field name.

Service Items Master

Regular charges that you bill to your clients are called *service items* in MR8. 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.

To speed the billing process and help you analyze your billable charges afterwards, MR8 organizes service items into a set of categories, called the *Service Items Master List*, which you can amend and organize to fit your business needs.

MR8 Service Groups: The main categories in the Service Items Master List, called *Service Groups*, are the most commonly used billable items for records retrieval companies. These main categories are preset by the system and cannot be modified by the user.

Name ▲
▶ 1. Original
2. Copy
3. Custodian Fee
9. Misc. Charge

Service Subgroups: Add the rest of your billable charges to the **Misc. Charge** Service Group (see “Adding service items”), where you can group them into *Service Subgroups*. Then, when billing, you can locate individual items quickly in their subgroups, instead of scrolling through a long, undifferentiated list of all of your miscellaneous services. MR8 comes with a default list of subgroups.

Service Group	Service Subgroup ▲
▶ 9. Misc. Charge	Delivery
9. Misc. Charge	Other
9. Misc. Charge	Pass-Through
9. Misc. Charge	Production
9. Misc. Charge	Standard Fee

Service Items Master

Adding service items

With the Service Items Master List, you define your firm's services for clients and staff to select from drop-down lists in MR8 and MR Web. Instead of longhand requests from clients or inconsistent descriptions in billing rate tables, service item descriptions are consistent throughout your system. Each billing rate table and online order form derives its service items list from this master template.

Include all of the services that you bill clients for in this list.

1. On the menu bar in MR8, click **Setup > Service Items Master**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Service Item window, enter the following information:
 - **Service Subgroup** – Select an appropriate subgroup in the drop-down. (See “Organizing service items.”)
 - **Service Item (required)** – Type the description to appear on invoices. The maximum length of this field is 128 characters.
 - **Unit Type** – Select the category in the drop-down for the billable units of this service item. MR8 prints the unit type on detailed invoices next to the number of units.
 - **Account No.** – Select an appropriate (revenue) account in the drop-down.
 - **Billing Rate** – Enter the default amount you charge per unit. If you bill different rates for different clients, leave this field blank and enter the actual rate in each billing rate table. (See “Setting up billing rates.”)
 - **Markup Type** – Specify whether you mark up a flat amount (\$) or a percentage of what's billed (%) for this service item.
 - **Markup** – Enter the default amount (or percentage) you mark up per unit. If you mark up different rates for different clients, leave this field blank and enter the actual rate in each billing rate table.
 - **Court Taxable** – Check this box 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** – Check this box if the service item is sales taxable.
 - **Discountable** – If you provide negotiated discounts for certain clients, check this box if the service item is discountable.
 - **Pointable** – If you have the MR8 Reward Points plug-in, check this box if the service item is worth points.
 - **Sales Rep Commissionable** – If you have sales representatives (account executives), check this box if the service item is commissionable.
 - **Show text on invoices** – Check this box to print the **Service Item Name** when an invoice is printed with “no details.” If invoices are printed with details, this checkbox is ignored.
 - **Show amount on invoices** – Check this box to print the amount when an invoice is printed with “no details.” If invoices are printed with details, this checkbox is ignored.
 - **Show on Online Orders (MRWeb)** – Check this box to make the service item available for clients to select when they are ordering online using MR Web.
 - **Show on Production Sheets** – Check this box to show the service item on production sheets. Leave blank if this item does not concern the production department.
 - **LEDES 1998B** – If you have clients who require that invoices be submitted electronically (e-billing), see “Electronic Billing” for more information.
4. Click **Save and Close**.



BEST PRACTICES

Spend some time coming up with appropriate names for service items. Consolidate similar items to simplify the list. Remember, this list is not just for your billing person. It will affect your clients as they use MR Web. And it will be used by the production staff. Plus, many reports in MR8 use this list to analyze the revenue stream for you.

Here is an example of the good versus the ugly in service item names:

The Ugly

Courier

DHL

FedEx

Federal Express Overnight

Hand Delivery

Postage

UPS

UPS Red



The Good

Delivery

Overnight Delivery



NOTE

If you decide to re-organize and want to remove a service item, but keep its data, right-click the service item, then choose **Merge To**. In the Merge To window, click the service item you want to add the removed service item's historical data to. In the MR8 pop-up window, click **Yes**. Merging only works with service items in the Misc. Charge group.

Service Items Subgroups

Organizing service items

To make finding a particular service item quicker, set up service items subgroups, then arrange your company's billable services into these subgroups. MR8 comes with a default set of service items subgroups. You can add, delete or modify service items subgroups.

1. To amend service subgroups, click **Setup > Service Items Subgroups**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. **Service Group** and **Service Subgroup No.** are set by MR8 and not editable. Enter a name in **Service Subgroup Name**.
4. Click **Save and Close**.



BEST PRACTICES

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.

Billing Rates & Billing Rate Groups

It is not uncommon to have more than 100 billing rate tables in your MR8 system to accommodate your different clients' needs and third-party requirements. To minimize the time it takes to locate a particular rate table when billing, group your rate tables into logical units. 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.

The structure for grouping billing rate tables in MR8 is called the *Billing Rate Group*. MR8 comes with one billing rate group, called "Standard." Rates charged to your average clients (known as *rack rates*) should be included in rate tables attached to the Standard Billing Rate Group.

After setting up your Service Items Master, set up Billing Rate Groups and create their related billing rate tables (see "Setting up billing rates"). You connect the billing rates to firms in the firm set-up (see "Setting up firms"). You can set up individual billing rate groups for different tiers of clients (such as your preferred clients), a particular firm, contact or case.

Billing Rate Group examples

Preferred Level 1

Preferred Level 2

State Farm Insurance

Vioxx

Kirkland & Ellis

Billing Rate Group

Adding billing rate groups

If you have a client (or case) that requires special pricing, create a new billing rate group first using MR8's Code Manager (see "Code Manager"). Then connect the client (or case) to that billing rate group.

1. Click **Tools > Code Manager > Accounting > Billing Rate Group**.
2. Click **Actions > New**, enter a name for the group, then click **Save and Close**.

Billing Rates

Setting up billing rates

For each billing rate group, create as many billing rate tables as you need.

1. On the menu bar in MR8, click **Setup > Billing Rates**.
2. Click **Actions** (or right-click on the grid), then choose **New**.

3. In the New Billing Rate window, enter the following information:
 - **Billing Rate Group** – Select a billing rate group in the drop-down.
 - **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 this field blank.
 - **City** – If you charge different rates for different cities, enter the city name. Otherwise, leave this field blank.

4. Click **Save**. A tab — **Base Rates** — appears in the lower half of the window.
5. In the **Base Rates** section, all of the service items from the master list are listed. Double-click each service item to make changes. (See “Adding service items.”)
6. Click **Save and Close**.



TIP

A quick way to add more billing rate tables is to copy (replicate) an existing table:

1. On the billing rate table list, right-click a billing rate table to copy from, then choose **Copy**.
2. Modify only those fields that are different, including the billing rate name. Then click **Save and Close**.

Billing Sets

If you have ever ordered a combo meal at a fast food joint, then you already understand what MR8 *billing sets* are: Preset groups of items that speed up the selection process because you only have to choose the set, not all of the individual items. You can include any number of service items in a billing set. Add service items for each attorney automatically by selecting the appropriate billing set in the drop-down.



Billing sets are not tied to billing tables. They only contain service items, so the same set can be used for different clients and cases. You apply the actual billing rates when billing the work order.

Billing Set examples

Billing Set Name ▲
Copy-Local
Copy-Out of Town
O&I-Authorization
▶ O&I-Subpoena
Process Serving

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.

Billing Sets

Creating billing sets

Set up a new billing set anytime you find yourself selecting the same set of services for multiple work orders.

1. On the menu bar in MR8, click **Setup > Billing Sets**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Billing Set window, enter a descriptive name in **Billing Set Name (required)**. Enter an expanded description under **Remarks**.
4. Click **Save**. An empty grid appears in the lower half of the window.
5. Click **New**.

6. In the New Service window, enter the following information:
 - **Service Group** – Select a service (main) group in the drop-down.
 - **Service Subgroup** – Select a service subgroup in the drop-down.
 - **Service Item** – Select a service item in the drop-down.
 - **Default Units** – Enter the default number of units.

7. Click **Save and Close**.
8. Repeat steps 5 through 7 until you have added all of the service items for this billing set.

Sample billing set

	Service Group	Service Subgroup	Service Name	Units
▶	- Service Group: 1. Original (1 Items)			
	1. Original	Original	Original	1.00
	- Service Group: 2. Copy (1 Items)			
	2. Copy	Copy	Copy	1.00
	- Service Group: 9. Misc. Charge (4 Items)			
	9. Misc. Charge	Other	Basic Fee	1.00
	9. Misc. Charge	Other	Subpoena Fee	1.00
	9. Misc. Charge	Production	Binders	1.00
	9. Misc. Charge	Delivery	Postage	1.00

9. Click **Save and Close**.



TIPS

A quick way to add more billing sets is to copy (replicate) an existing one:

1. On the billing set list, right-click a billing set to copy from, then choose **Copy**.
2. Modify only those fields that are different, including the billing set name. Then click **Save and Close**.

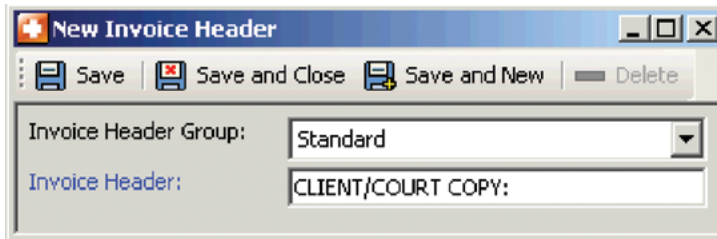
To change the order of items in a service group, highlight an item, then click **Upward Sequence** or **Downward Sequence** to move the item up or down one line in the group. The order of service items in the billing set will be the order of service items on invoices using that billing set.

Invoice Headers

Setting up invoice headers

MR8 automatically generates a standard invoice header for each item based upon your input. Create your own custom headers for specific circumstances, and organize them into groups to save you time locating one when billing.

1. On the menu bar in MR8, click **Setup > Invoice Headers**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Invoice Header window, enter the following information:
 - **Invoice Header Group** – Select an invoice header group in the drop-down. Invoice header groups are defined using Code Manager. (See “Adding drop-down entries.”)
 - **Invoice Header (required)** – Enter an invoice header.



4. Click **Save and Close**.



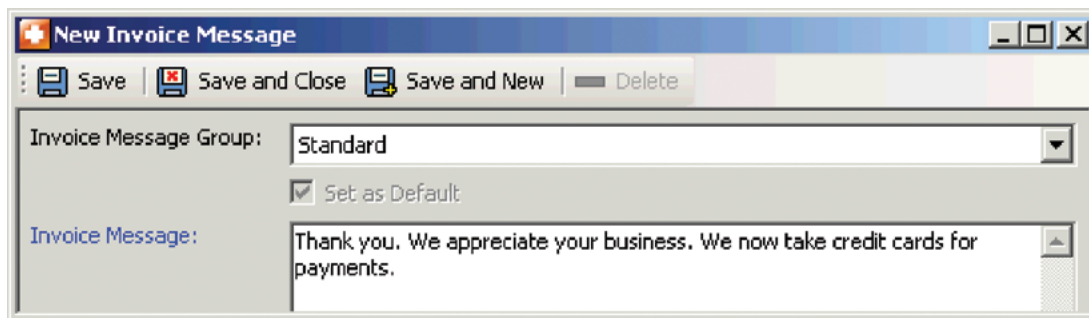
USAGE EXAMPLE		
Records From	Ordered By	Reference I
Memorial Herman Hospital Medical Records 7770 Southwest Freeway Houston, TX 77041	Daniel Berg Berg Steiner Chapman LLP 510 Louisiana Street, 2nd Floors Houston, TX 77042	Client Matter No.: 45-123 Claim No.: 2006-4511-234 Insured: Merck & Co. D/O/L: 1/5/2006
CLIENT/COURT COPY: Yong B. Lee (Medical) Clear Tabs Binders Basic Fee		17.00 Pages

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. On the menu bar in MR8, click **Setup > Invoice Messages**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Invoice Message window, enter the following information:
 - **Invoice Message Group** – Select an invoice message group in the drop-down. Invoice message groups are defined using Code Manager. (See “Adding drop-down entries.”)
 - **Set as Default** – Check this box to have this message appear as the default on invoices. You can override the default on individual invoices.
 - **Invoice Message (required)** – Type a message of up to 2,048 characters.



4. Click **Save and Close**.



USAGE EXAMPLE

1 SET OF Medical RECORDS OF: Yong B. Lee (Medical) Clear Tabs Binders Postage Basic Fee	17.00 Pages
<hr/>	
TOTAL DUE >>>	
Thank you. We appreciate your business. We now take credit cards for payments.	



Firms

Firms are entities you do business with, such as law firms, vendors, insurance companies, corporate clients and courts. The Firms table is your address book and information file on all of these entities. Enter firm information first, then add all of the individuals you have contact with at that firm as *Contacts*. (See “Contacts.”)

Firms

Setting up firms

Use the Firms table to store information on every firm, court and other entity you do business with.

1. On the menu bar in MR8, click **Setup > Firms**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Firm window, the **General** tab is automatically selected. Enter the following information:
 - **Firm Name – required.**
 - **Address** – This is a multi-line field for the street address. Use the **Enter** key to format the address the way you want it to appear on labels and documents. Do not include city, county, postal code or country here.
 - **Postal Code** – Enter the firm’s zip code/postal code and click the binoculars button. MR8 will automatically populate the **City/Town, State/Province** and **Country** fields.
 - **Main Phone** – Enter the 10-digit phone number. This enables you to use this number when searching for a contact in the Contacts window. (See “Setting up contacts.”)
 - **Firm Type** – Select a firm type in the drop-down. The firm type is a designation specifying industry (e.g., Law Firm or Insurance Company).
 - **Search Key** – Skip this field. This is mainly for backward compatibility with MR7.
 - **Warning** – Enter any alerts that anyone using MR8 must be aware of regarding this firm, such as “In collection, no more orders!” or “Advance deposit is required for all jobs.” This is an internal warning only.



TIP

MR8 comes with a zip code database provided by the United States Postal Service. When you type in a zip code and click the binoculars button, the city, state and country appear automatically. Use this feature to verify the zip code for any firm, location or resource you are entering.



NOTE

If you enter text in the **Warning** field of a firm, a yellow warning icon will appear next to the **Firm** field on other MR8 screens related to that firm, such as their contacts or orders. Pausing the cursor over the icon pops up the warning text.



4. Click the **Additional** tab. Enter the following information:
 - **Web URL** – Enter the firm’s website address, so you can go to the firm’s website by clicking the up arrow (launch application) button.

- **Parent Firm** – For multi-branch firms, you can link them together under their parent firm. The parent firm is usually the main office. Click the binoculars (browse) button to look up and select the parent firm, if applicable. Designate the parent firm for the main office too, so that when you search in other functions, you will see the information for all of the related firms in one grid.
- **Tax ID** – Enter the firm’s tax ID number.
- **COD** – Check this box to mark all invoices sent to this firm “Cash on Delivery.” (See “Working with COD invoices.”)
- **Always print detail on invoices** – When you bill, you can decide whether to show detailed breakdowns on each invoice or not. Check this box if the firm requires details on all invoices at all times.
- **Consolidate statement** – By default, monthly statements are printed for each contact at this firm separately. Check this box to print consolidated statements addressed to “Accounts Payable.”
- **Late Charge** – Enter a percentage (e.g., “10.000”) for calculating and printing late charges on all invoices for this firm. The late charge is a one-time account service fee.
- **Finance Charge** – Enter a percentage (e.g., “1.500”) for calculating and printing finance charges on all open invoices for this firm. The finance charge is calculated once a month for all open invoices. (See “Generating finance charges.”)
- **Sales Tax Rate** – Enter a percentage (e.g., “8.250”) for calculating and printing sales tax on all invoices for this firm. What’s taxable is specified at the service item level. (See “Adding service items.”)
- **Discount Rate** – Enter a percentage (e.g., “7.000”) for calculating and printing a negotiated discount on all invoices for this firm. What’s discountable is specified at the service item level.
- **Payment Terms** – Select the firm’s payment terms in the drop-down.
- **Statement Type** – Select a delivery method in the drop-down. Select Don’t Send if this firm does not want to receive monthly statements.
- **Email** – Enter the email address to be used for consolidated statements. You can also send an email to this address by clicking the up arrow button.
- **Ref. Account No.** – When you set up to have your accounting system read MR8 data, this field can be used to store the reference number (or customer number) that the accounting system has assigned for this firm.
- **Billing Address** – If this firm requested that invoices be sent to a different office than the main one entered on the **General** tab, check **Use this address for billing** and enter the address. Invoices and statements will bear this address instead of the main address.



NOTE

If you check **COD** for a firm, a red COD icon appears next to the **Firm** field on other screens related to that firm.



5. Click the **Marketing** tab. Enter the following information:
 - **Firm Class** – Select a firm class in the drop-down. The firm class is a designation specifying the quality or ranking of a law firm. Firm classes are set up in Code Manager. (See “Adding drop-down entries.”)
 - **Firm Rating** – Select a firm rating in the drop-down. The firm rating is a designation specifying the credit rating of a firm. Firm ratings are set up in Code Manager.
 - **Source** – Select a source indicating how the client heard of you in the drop-down. Sources are set up in Code Manager.
 - **Client Rep** – If this firm is assigned to a particular client rep, look up the client rep by clicking the binoculars button. By default, orders coming from this firm will be supervised by this client representative.

- **Sales Rep** – If this firm belongs to a particular sales rep (account executive), look up the sales rep by clicking the binoculars button. MR8’s Sales Commission Report uses this field to find commissionable invoices.
 - **Billing Rate Group** – Select a billing rate group in the drop-down. (See “Billing Rate Groups.”)
 - **Misc. Code** – When **Firm Type** and **Firm Class** are not enough to classify firms, use this field to categorize them further by entering your own codes.
6. Click the **Collection Info** tab. Enter the following information:
 - **Collector** – If you are pursuing this client to collect on overdue invoices, look up the person handling this issue by clicking the binoculars button.
 - **Account Status** – Select the current status in the drop-down.
 - **Payment Promised** – If the firm has promised to pay, enter the amount promised here.
 - **Payment By** – Enter the date the firm has promised to pay by. This date will trigger a message to the person listed in the **Collector** field.
 7. Click **Save**. MR8 automatically fills in the **Firm No., Created, Created By, Last Modified** and **Last Modified By** fields. Four more tabs—**Preferred Services, Firm-level Repository, Notes Log** and **Tags**—appear. See “Entering a firm’s preferred services,” “Uploading files,” “Viewing files,” “Downloading files,” “Making notes” and “Organizing with tags” for more details.



NOTE

If you change a firm’s **Client Of** resource or **Sales Rep** in the future, MR8 will automatically create an entry in the firm’s **Notes Log** tab with that information.



IMPORTANT

When merging firms, the collection logs will be merged also so you won’t lose any of their collection history. To merge two firms (such as when a client closes a branch office), right-click the firm in the Firms window you are eliminating, then choose **Merge To**. In the Merge To window, find and select the firm you want to add the removed firm’s historical data to. In the MR8 pop-up window, click **Yes**.

Firms

Entering a firm’s preferred services

If you have a client firm with a lot of attorneys, you can enter standing orders (preferred services) as a part of the firm’s profile instead of one by one for each contact in the firm. Then when creating orders for any contacts within this firm, this information is available to help speed the process. (See “Entering service items using billing sets.”)

1. In the Firm window, click the **Preferred Services** tab.
2. Click **New**.
3. In the New Preferred Service window, enter the following information:
 - **Service Group** – Select a main services group in the drop-down.
 - **Service Subgroup** – Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Item** drop-down below.
 - **Service Item** – Select a service item in the drop-down.
 - **Delivery Method** – Select a method of delivery in the drop-down.
 - **Instruction** – Enter special instructions, if any, for the production department for this service item.



Contacts

Contacts are individuals who work for firms you do business with, such as attorneys, paralegals, secretaries, claim adjusters, court clerks and other contacts. The Contacts table is where data on all of these individuals is stored.

Contacts

Setting up contacts

Use the Contacts table to store information on everyone you deal with at the different firms you do business with. In MR8, contacts are attached to their firms, so set up the firm first (See “Setting up firms”), then add contacts to it.

1. On the menu bar in MR8, click **Setup > Contacts**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Contact window, the **General** tab is automatically selected. Enter the following information:
 - **Display Name (required)** – This is the name shown on the reports and printouts as well as in the Results pane when you search for a contact. Select one of the automatically generated names after you fill out the **First Name**, **Last Name** and **Middle Name** (optional) fields. It is recommended that you use the “First Name Last Name” format, but whatever style you choose, it is important to be consistent in using the same **Display Name** style for all of your contacts in MR8.

- **Firm (required)** – Click the binoculars button to select the firm this contact belongs to.
- **Mobile Phone** – Enter the contact’s 10-digit mobile phone number that will receive text messages.
- **SMS Provider** – Select the contact’s mobile phone carrier in the drop-down. MR8’s text messaging will not work if the mobile phone carrier is not correct.



TIPS

To send a text message to a contact from within MR8, click the up arrow button next to the **Mobile Phone** field. In the Send SMS window, enter your message and click **OK**.

You can search for contacts by phone number. In the **Caller ID** field in the Contacts window Search pane, enter the contact’s 10-digit Main Phone, Direct Phone, Mobile Phone or their firm’s Main Phone number and click **Search**.

- **Contact Type** – Select a contact type in the drop-down. The contact type is a designation specifying profession (e.g., Attorney or Paralegal). Contact types are set up in Code Manager. (See “Adding drop-down entries.”)
 - **Search Key** – Skip this field. This is mainly for backward compatibility with MR7.
 - **Warning** – Enter any alerts that anyone using MR8 must be aware of regarding this contact, such as “Has own forms.” This is an internal MR8 warning like the firm warning.
4. Click the **Additional** tab. Enter the following information:
- **Communication Type** – Select the communication method this contact prefers for receiving notifications as the default. Communication types are set up in Code Manager. (See “Adding drop-down entries.”)
 - **Email** – Enter the email address this contact prefers for receiving general email, not order confirmations or invoices. You can send an email to this address from here by clicking the up arrow button. The email address will also appear in the main Contact screen’s results grid, so you do not have to go into a contact’s detail screen to see it.
 - **Confirmation Communication Type** – Select the communication method this contact prefers for receiving order confirmations as the default.
 - **Confirmation Email** – If you selected email as the **Confirmation Communication Type**, enter the email address this contact prefers for receiving order confirmations, typically their secretary’s or paralegal’s.
 - **Billing Communication Type** – Select the communication method this contact prefers for receiving invoices as the default.
 - **Billing Email** – Enter the email address this contact prefers for receiving invoices if you selected email as the **Billing Communication Type**.
 - **Fee Limit** – Enter the (custodian) fee limit for this contact.
 - **Web Account Name** – Enter a unique account name for this contact to use to log into MR Web. If you leave this field blank, the system generates one automatically for you. Afterwards, the contact can change the account name anytime through MR Web.
 - **Web Password** – Enter a *strong* password containing up to 14 characters. The contact can change the password anytime through MR Web.



BEST PRACTICES

For a password to be strong, it should:

- Be at least seven characters long.
 - Contain letters, numbers and symbols.
 - Have at least one symbol character in the second through sixth positions.
 - Not contain your name or user name.
 - Not be a common word or name.
5. Click the **Marketing** tab. Enter the following information:
- **Rating** – Select a rating in the drop-down. The rating is a designation specifying the credit rating of the individual contact. Credit ratings are set up in Code Manager. (See “Adding drop-down entries.”)
 - **Client Rep** – If this contact is assigned to a particular client rep, look up the client rep by clicking the binoculars button. By default, orders coming from this contact will be supervised by this client representative.
 - **Sales Rep** – If this contact belongs to a particular sales representative (account executive), look up the sales rep by clicking the binoculars button. MR8’s Sales Commission Report uses this field to find commissionable invoices.

- **Billing Rate Group** – Select a billing rate group in the drop-down.
 - **Misc. Code** – When **Job Title** and **Contact Type** are not enough to classify contacts, use this field to categorize them further by entering your own codes.
 - **Home Address** – When you send out a birthday card or reward certificate to this contact, MR8 provides an option for you to send it either to the firm address or to the home address.
6. Click **Save**. Automatically:
- MR8 fills in the **Contact No.**, **Created**, **Created By**, **Last Modified** and **Last Modified By** fields.
 - An Anniversaries section appears on the **Marketing** tab. See “Remembering important client dates.”
 - Six more tabs — **Manage Assistants**, **Manage Access**, **Preferred Services**, **Contact-level Repository**, **Notes Log** and **Tags** — appear. See “Managing assistants,” “Managing MR Web access,” “Entering a client’s preferred services,” “Uploading files,” “Viewing files,” “Downloading files,” “Making notes,” and “Organizing with tags” for more details.



NOTE

Even though it might not be a common practice, you can attach individual contacts (attorneys), rather than their firms, to a billing rate group.



TIP

A quick way to add more contacts for a firm is to copy (replicate) an existing contact:

1. On the contact list, right-click a contact to copy from, then choose **Copy**.
2. Modify only those fields that are different, including the display name. Then click **Save and Close**.

Contacts

Remembering important client dates

Use MR8 to keep track of important dates, such as birthdays and anniversaries, for all of your contacts. You can track multiple dates for each contact, and send yourself or other staff members automatic reminders of the dates through the Message Center. Use Anniversary Inquiry to generate envelopes or labels for cards. (See “Keeping track of important client dates.”)

1. In the Contact - [contact name] window on the **Marketing** tab, click **New** under Anniversaries.
2. In the New Anniversary window, enter the following information:
 - **Anniversary Type** – Select the celebration type in the drop-down.
 - **Anniversary Date/Anniversary Year** – Click the arrows to use the Date Navigators to select the dates.
 - **Alert in advance** – Enter the number of days prior to the event you want to be reminded.
3. Under Alert To, click **Add**.
4. In the Lookup Users window, check the **Select** box next to each person you want to receive a reminder of the anniversary through the Message Center.

Contacts

Managing assistants

Each contact can have an unlimited number of assistants (such as secretaries) and can be the assistant of an unlimited number of contacts. An *assistant* can be any other contact from the same firm. Assistant names appear in the Ordered By drop-down in Case Manager.

1. In the Contact window, click the **Manage Assistants** tab.
2. To designate this contact's assistants, click **Add/Remove** in the Assistants section.
3. In the Add/Remove Assistants window, check a blank box to add the corresponding assistant. Click a marked checkbox to remove an assistant.
4. Click **Save and Close**.



TIP

If a secretary works for several attorneys, there is a quicker way to make the secretary an assistant of multiple attorneys than going into each attorney's profile one at a time:

1. In the detail screen for the secretary, click the **Manage Assistants** tab.
2. Click **Add/Remove** in the Assistant Of section.
3. In the Add/Remove Assistant Of window, check the **Add** box next to each attorney the secretary is an assistant of. Click **Check All** to speed the selection of multiple contacts.

Contacts

Managing MR Web access

Each contact can have an unlimited number of seniors (for example, lead attorneys or paralegals — anyone who oversees a case). A *senior* can be any other contact from any firm. Seniors have access to all activities in MR Web associated with any contact to whom they are senior.

1. Click the **Manage Access** tab in the Contact window.
2. To designate a contact's seniors within their own firm, click **Add/Remove** in the Grant Access To section. Then in the Add/Remove Grant Access To window, check a blank box to add the corresponding senior. Click a marked checkbox to remove a senior.
3. To designate a contact's seniors from outside their firm, click **Add** in the Grant Universal Access To section. Then in the Lookup Contact window, search for the contact(s). Check the box next to any outside contacts who should have access to this contact's MR Web activities and click **Select**.
4. Click **Save and Close**.



TIP

If a lead attorney or paralegal oversees a case involving several attorneys, there is a quicker way to grant the lead access to multiple attorneys than going into each attorney's profile one at a time.

1. In the detail screen for the lead, click the **Manage Access** tab.

2. For contacts within the same firm, click **Add/Remove** in the Have Access To section. Then in the Add/Remove Have Access To window, check the **Add** box next to each attorney the paralegal should have access to.
3. For contacts outside of the firm, click **Add** in the Have Universal Access To section. Then in the Lookup Contact window, search for the contact(s). Check the box next to any outside contacts this lead should have access to and click **Select**.

Contacts

Entering a contact's preferred services

If a contact has standing orders (preferred services), you can enter them as a part of the contact's profile. This information can be imported directly into Case Manager

1. In the Contact window, click the **Preferred Services** tab.
2. Click **New**.
3. In the New Preferred Service window, enter the following information:
 - **Service Group** – Select a main services group in the drop-down.
 - **Service Subgroup** – Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Item** drop-down below.
 - **Service Item** – Select a service item in the drop-down.
 - **Delivery Method** – Select a method of delivery in the drop-down.
 - **Turnaround Type** – Select the production turnaround time in the drop-down.
 - **Instruction** – Enter special instructions, if any, for the production department for this service item.



Locations

Locations are places where you go to get records, such as hospitals or doctors' offices. They are commonly known as custodians or facilities.

Locations

Setting up locations

Enter custodians of records into the Locations table with complete contact information, details about the location, and directions.

1. On the menu bar in MR8, click **Setup > Locations**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Location window, the **General** tab is automatically selected. Enter the following information:
 - **Location Name – required.**
 - **Address** – This is a multi-line field for the street address. Use the **Enter** key to format the address the way you want it to appear on labels and documents. Do not include city, county, postal code or country here.
 - **Postal Code** – Enter the location's zip code/postal code and click the binoculars button. MR8 will automatically populate the **City/Town, State/Province** and **Country** fields.
 - **Department** – If applicable, select the location's department in the drop-down to differentiate between different areas of a location. For example, if you retrieve records from the emergency room and the cardiology units of a hospital, enter them as separate locations by selecting different departments.
 - **Contact** – Enter the name of the location's main contact person.
 - **Location Type** – Select a location type in the drop-down. The location type is a designation specifying category of facility (e.g., Hospital or School). Location types are set up in Code Manager. (See "Adding drop-down entries.")
 - **Warning** – Enter any alerts that one must be aware of regarding this location. This is an internal MR8 warning like the firm warning.
4. Click the **Additional** tab. Enter the following information:
 - **Web URL** – Enter the location's website address, so you can go to the location's website by clicking the up arrow (launch application) button.
 - **Email** – Enter an email address to use for sending correspondences.
 - **Communication Type** – Select the communication method this location prefers for receiving correspondences as the default.
 - **Serve By** – Select how the legal papers will be served on this location in the drop-down. If Third Party is selected, the Lookup Firm window will open automatically for you to select a vendor. You can add more Serve By options in Code Manager. (See "Adding drop-down entries.")
 - **ROI Handled By** – Specify who handles the release of information for this location (e.g., SDS) if different from the location. Otherwise, leave this field blank.
 - **Expeditor** – If a particular expeditor has intimate knowledge about this location, enter it here. The expeditor will be pulled in as the default **Assign To** when work orders are created for this location. Otherwise, leave this field blank.
 - **Directions** – Enter directions to the location.

Getting Started

5. If this location is an individual physician, click the **Doctor Info** tab. Enter the doctor's information and select their **Specialty** in the drop-down.
7. Click **Save**. MR8 automatically fills in **Location No.**, **Created**, **Created By**, **Last Modified** and **Last Modified By**. Three more tabs — **Notes Log**, **Tags** and **Location-level Repository** — appear. See “Making notes,” “Organizing with tags,” “Uploading files,” “Viewing files” and “Downloading files” for more details.

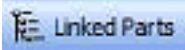


TIPS

If you are entering a new location that is similar to an existing one, save time and reduce errors by copying an existing one and changing only the different information:

1. On the location list, right-click a location to copy from, then choose **Copy**.
2. Modify only those fields that are different, then click **Save and Close**.

If you click the **Linked Parts** button in a Location detail screen, all parts associated with that location are listed. Double-click a part in the list to view its details.



Tracking Steps

Setting up tracking steps

Use MR8's built-in tracking to monitor work orders as they move through your order processing workflow. First, create items that you want to track in Code Manager. (See "Adding drop-down entries.") Then, create steps that each item goes through in the workflow.

1. On the menu bar in MR8, click **Setup > Tracking Steps**.
2. In the Search Criteria pane, select an item in the **Tracking Item** drop-down, then click **Search**. MR8 lists all of the steps entered so far.
3. Click **Actions** (or right-click on the grid), then choose **New**. In the New Tracking Step window, enter the following information:
 - **Step Name** – Enter a description for this milestone.
 - **Due Days** – Enter the maximum number of days a work order can stay in this step, if applicable.
 - **Publish** – Check this box to make this step visible to clients on MR Web.
 - **Users to notify** – Click **Add**. In the Lookup Users window, check the **Select** box next to each MR8 user to be notified when this step is completed, then click **OK**.

The screenshot shows the 'New Tracking Step' dialog box. The 'Tracking Item' is 'Records'. The 'Step Name' is 'Records Received'. The 'Due Days' is '0'. The 'Publish' checkbox is checked. The 'Users to notify' section shows a table with one user: Naomi Johnson.

Display Name	Company	Department
▶ Naomi Johnson		

4. Click **Save and Close**.

**TIP**

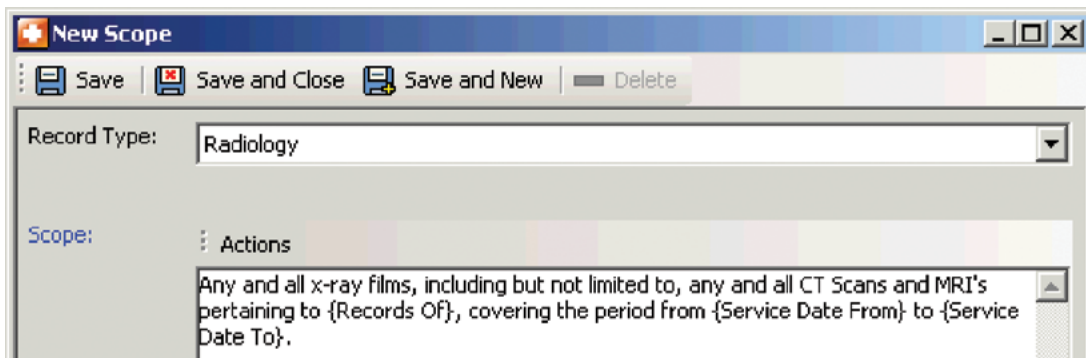
To move a step to a different place in the workflow order, right-click the step and choose either **Upward Sequence** or **Downward Sequence**.

Scopes

Setting up scopes

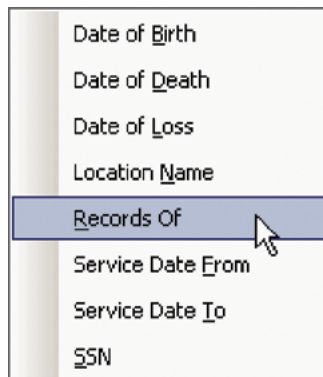
Scope defines the extent and range of records being requested. You can set up an unlimited number of scopes per record type.

1. On the menu bar in MR8, click **Setup > Scopes**.
2. In the Search Criteria pane, select record type(s) in the **Record Type** drop-down, then click **Search**. MR8 lists all of the scopes entered so far for the specified record type(s).
3. Click **Actions** (or right-click on the grid), then choose **New**. In the New Scope window, enter the following information:
 - **Record Type** – Select a category in the drop-down.
 - **Scope** – Enter text that will appear on documents. Click **Actions > Add Data Field** to insert merge fields into the text.



NOTE

You can insert any of the following fields into scopes:



TIP

Scopes set up here are limited to 2,048 characters. If you want a longer scope, create it as an MR8 form using Form Manager to attach to part orders as an exhibit. (See “Creating forms and letters.”)

Setting up canned file descriptions

Instead of typing descriptions for each file you upload to a repository, build a list of typical descriptions in the new Repository Descriptions Setup function. Then look up and select the appropriate description from the list in the Description field of a file in any repository. You can alter the selected text in the Description field, if needed, of an individual file, or revise any canned file description for future use.

1. On the menu bar in MR8, click **Setup > Repository Descriptions**.
2. In the Search Criteria pane, click **Search** to see all of the repository descriptions entered so far. Or to limit the search results, click in the **File Type** field, then uncheck ALL and check individual box(es) to see existing canned file descriptions for p
3. Click **Actions** (or right-click on the grid), then choose **New**.
4. In the New Repository Description window, enter the following information:
 - **File Type** – Select a category in the drop-down.
 - **Description** – Enter text that will appear in the **Description** field of selected files in a repository.
5. Click **Save and Close**.



NOTES

To update an existing canned file description, double-click the description in the **Setup > Repository Descriptions** search results. Then update the information in the **File Type** drop-down and/or the **Description** field, and click **Save and Close**.

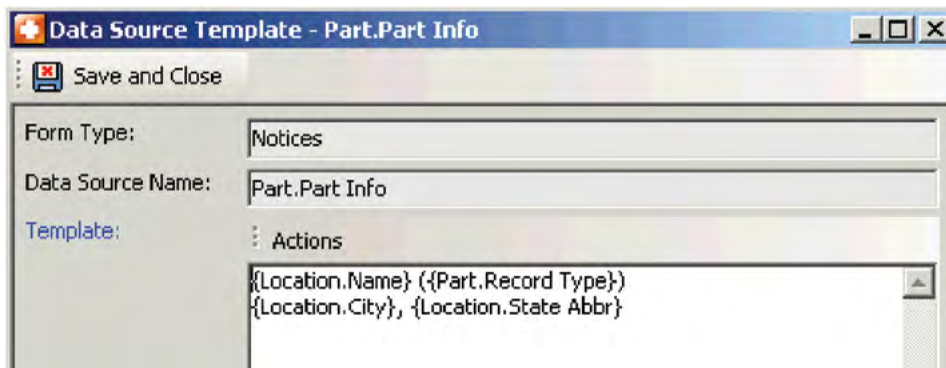
To delete an existing canned file description, double-click the description in the **Setup > Repository Descriptions** search results. Then click **Delete**. In the popup that appears, click **Yes**.

To use a canned file description, when uploading a file to a repository, click the file's **Description** field in the New Upload window, then click the ellipsis button. Double-click the desired canned file description in the Lookup Repository Description window to select it. Edit the text in the **Description** field if desired, then click **Save and Close**. See "Uploading files."

Modifying data source templates

When MR8 prints a list of parties or locations on documents, it uses preset data source templates to determine what data fields are printed. You can edit these templates to better fit your company's needs.

1. On the menu bar in MR8, click **Setup > Form Data Source Templates**.
2. In the Search Criteria pane, ALL is the default form type. In the **Form Type** drop-down, click the ALL checkbox to de-select it, then select a category and click **Search**. MR8 lists all of the templates for the specified form type.
3. Double-click the data source template you want to edit.
4. In the Data Source Template window, update the selected template:
 - **To insert a new field** – In the **Template** field, click where you want to insert a merge field. Click **Actions > Add Data Field**, then select the field.
 - **To delete an existing field** – In the **Template** field, highlight the field(s) you want to delete, then press the **Delete** key.



5. Click **Save and Close**.



USAGE EXAMPLE

**NOTICE OF INTENTION
TO TAKE DEPOSITION BY WRITTEN QUESTIONS**

To Plaintiff by and through their attorney(s) of record: **Holly Rice (Smith, Connelly & Rice) and Martinez)**

To other party/parties by and through their attorney(s) of record:

You will please take notice that twenty (20) days from the service of a copy hereof with attached written questions will be taken of Custodian of Records for:

**Memorial Herman Hospital (Medical)
Houston, TX
Sugar Land Imaging Center (Radiology)
Sugar Land, TX**

Form Packages

Creating form packages

Packages are preset groups of forms that speed up the document printing process because you only have to choose the package to print, not all of the individual forms. Create as many packages as you need. Each package can include an unlimited number of forms selected from any category.

1. On the menu bar in MR8, click **Setup > Form Packages**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Form Package window, enter the following information:
 - **Package Name (required)**– Enter a descriptive name for this package (e.g., Custodian-Authorization or Custodian-Subpoena).
 - **Send To** – Select a destination type in the drop-down.
 - **PDF File Name for Email (required)** – Enter a descriptive file name for the PDF file that will be created of the package with bookmarks. The PDF file will be sent as an attachment to email. The file name must end with .PDF (in all caps).
 - **Remarks** – Enter a description of the form package to help users select the correct package.

The screenshot shows a dialog box titled "New Form Package". At the top, there is a toolbar with icons for "Save", "Save and Close", "Save and New", "Delete", and "Copy". Below the toolbar, there are four input fields:

- Package Name:** A text box containing "Custodian-Subpoena".
- Send To:** A dropdown menu with "Location" selected.
- PDF File Name for Email:** A text box containing "Subpoena for Custodian.PDF".
- Remarks:** A text area containing "Package for custodians when subpoenas are used."

4. Click **Save**. An empty grid appears in the lower half of the window.
5. Click **New**.
6. In the New Form window, select a **Form Type**, **Form Group** and **Form Name** in the drop-downs. Enter the number of copies to be printed for this form and a descriptive name for its bookmark in the PDF file of the package.

The 'New Form' dialog box contains the following fields:

- Form Type: Subpoenas
- Form Group: State
- Form Name: Subpoena-State-Standard
- Number of Copies: 1
- PDF Bookmark for Email: Subpoena

7. Click **Save and Close**.
8. Repeat steps 5 through 7 until you have added all of the forms for this package.

Sample package

Forms				
Sequence	Form Type	Form Name	Copies	PDF Bookmark
1	Custodian Letters	Custodian Letter	1	Cover Letter
2	Subpoenas	Subpoena-State-Standard	1	Subpoena
3	Interrogatories		2	Questions
4	Affidavits	Affidavit-State-No Recs	1	Affidavit of No Record

9. Click **Save and Close**.



TIPS

To move a form to a different place in the package printing order, click the form in the Forms grid and choose either **Upward Sequence** or **Downward Sequence**.

To add forms to (or otherwise edit) an existing package, click **Search** in the Form Packages Search Criteria pane to see all the packages created so far. Double-click a package to select it. Then follow steps 3 through 9 above.

Chapter 4: Order Processing

Use MR8's Orders module to enter new cases, work orders (parts) and waiver responses; plus receive records, print forms, request fee checks and schedule pickups.

Functions covered in this chapter:

Case Manager

Task Manager

Notify Runners

Print Forms

Print Certified Mail Cards

Receive Records

Daily Orders Audit

Orders in Progress

Processed Orders

Orders Turnaround

Order Analysis





Case Manager

MR8's *Case Manager* is your launch pad to order processing. Use it to set up cases, either from scratch or by copying existing ones. Then create work orders, print forms, request fee checks, call custodians, and receive records, all without leaving Case Manager.

Case Manager

Starting new cases from scratch



When a client sends in a new case, quickly add the case to your MR8 workflow using this function. If you are entering a new patient on a continuing case (e.g., class action lawsuit), see “Creating new cases from old cases.”

1. On the menu bar in MR8, click **Orders > Case Manager** (or press **F2**).
2. Click **New** (located at the top of the grid).
3. In the New Case window, enter the following information:
 - **Contact – (required)** Click the binoculars button to search for the contact who is ordering. After a contact is selected, the selected contact's firm and phone numbers automatically appear and all of the assistants for the selected contact appear in the **Ordered By** drop-down below.
 - **Ordered By** – Select a name in the drop-down. If the assistant you want is not listed, type the assistant's name in the field.
 - **Case Name** – Enter a brief case name (e.g., Lee vs. OMTI). This short case name prints on all documents including invoices and reports.
 - **Case No.** – Enter the court-assigned cause number for this case.
 - **State** – Select the state (where the case is filed) in the drop-down.
 - **County** – If this is a *state* case, enter the county, such as “Harris.”
 - **Court** – If this is a *state* case, enter the judicial court information, such as “151st” or “County Court at Law Number Two.”
 - **District** – If this is a *federal* case, enter the district, such as “Southern.” Also, check the **Federal Case** box.
 - **Division** – If this is a *federal* case, enter the division, such as “Houston.”
 - **Notation** – Enter special notations, such as “SR” (for super rush) or “NC” (for new client). Notations appear in the grid, so you can group or sort cases by this field.
 - **Rush** – Check the box if this is a rush case.
 - **Processor** – If applicable, click the binoculars button to select the case coordinator who will process this case.
 - **Client Rep** – Click the binoculars button to select the client representative who will oversee this case on behalf of the client. The default comes from the (ordering) contact.
 - **Order Date** – The default is today's date. Type over the default date in the field, or click the arrow button and select a date in the Date Navigator.
 - **Business Unit – (required)** Select the business unit that should get the credit for this order in the drop-down. The default is the business unit you specified in the User Preferences window.
 - **Warning** – Enter any alerts that one must be aware of regarding this case.



NOTE

If you enter text in the **Warning** field of a case, a yellow warning icon will appear next to the **Records of** field on other MR8 screens. Click the lookup button next to the field to view the warning text in the Case window.

Records Of:  Yong Lee 

4. Click the **Records Of** tab to enter:

- **Records Of** – Enter the patient’s name, including “aka” (also known as), if applicable. (Field length is 1,024 characters.)
- **Patient Type** – Select a type in the drop-down, such as Plaintiff.
- **Address** – If necessary, enter the home address of the patient. Do not include city, state or zip code here. Enter the zip code in **Postal Code** and click the binoculars button. **City/Town, State/Province** and **Country** fields will automatically populate.
- **SSN** – Enter the patient’s social security number.
- **Date of Birth** – Enter the patient’s date of birth.
- **Date of Death** – Enter the patient’s date of death, if applicable.
- **Date of Incident** – Enter the incident’s date, if applicable.
- **Authorized By** – Specify whether the authorization is by Subpoena or by Patient. The default is Subpoena.

5. Click the **Additional Info** tab to enter:

- **Due Date** – Since each part (work order) carries its own due date, entering a due date here at the case level might not be that useful or necessary.
- **Trial Date** – If known, enter the trial date for this case.
- **Start Date** – Enter the date you want to start working on this case. Using the Task Manager function, you can pull up work orders based on this date. (See “Generating a task list.”)
- **Waiver Date** – Enter the date the waiver period will end. Using the Task Manager function, you can pull up work orders based on this date.
- **Received By** – Specify how this order was received in the drop-down.
- **Case Type** – Select a case type (e.g., Product Liability) in the drop-down.
- **Sales Rep** – Click the binoculars button to select the sales representative who should get a commission for this case. The default comes from the (ordering) contact.
- **Full Case Name** – Enter the full case style yourself or click **Assemble Case** to have MR8 automatically assemble the full case style using the seven style lines in the **Forms** tab.
- **Court** – On certain documents, such as state subpoenas, the name of the court (including full address) might be required. Click the binoculars button to select the court from the Firms table.
- **Clerk** – If needed, click the binoculars button to select the clerk who is with the court selected above. Clerks are entered in the Contacts table.
- **Remarks** – Any information entered here is for internal review only.

6. Click the **Forms** tab to enter:

- **Style Line 1 thru 7** – Enter the full case style formatted exactly the way you want it to be printed on documents. For example, enter the plaintiff in line 1, the defendant in line 7 and “vs.” in line 4 so that the full case style will be centered on documents.
- **Court Line 1 thru 7** – Click **Assemble Court** to have MR8 automatically assemble the court style using the information you entered (County, Court, District and Division) in the **General** tab.



NOTE

The court style is assembled using the templates that are located in **Tools > System Preferences**. You can modify them to suit your company’s preferences.

7. Click **Save**. Four more tabs—**Parties**, **Case-level Repository**, **Status Log** and **Notes Log**—appear.
8. Click the **Parties** tab to enter all of the parties who are involved in this case (attorneys of record). MR8 adds the ordering contact that was entered in the **General** tab as the scheduling party automatically. Also, enter services requested by each party. (See “Entering parties” and “Entering requested services.”)
9. Click the **Case-level Repository** tab to upload any documents (e.g., order form) you have for this case to the central repository.
10. Click **Save and Close**.



NOTES

Status Log tracks status changes made to cases include who made the change and when. It is not editable. Notes Log is where you enter notes for your internal company use. See “Making notes.”

If you change the ordering attorney on the **General** tab, MR8 will automatically change the scheduling party on the **Parties** tab.

Case Manager

Entering parties

Parties are people or groups involved in a legal proceeding as litigants. In MR8, a party can be any contact person who belongs to a firm.

1. In the Case window, click the **Parties** tab.
2. The scheduling/ordering contact is automatically added by MR8. To add additional parties, click **New**.
3. In the New Party window, enter the following information:
 - **Contact – (required)** Click the binoculars button to search for the contact. Once the contact is selected, the firm name appears in the **Firm** field as a reference.
 - **For** – Specify which side this party represents (e.g., Plaintiff or Defendant).
 - **Represents** – Enter the name of the person or group this party represents. (Field length is 1,024 characters.)
 - **Scheduling Attorney** – This box is grayed out because you cannot designate who is the scheduling attorney, only the ordering attorney.
 - **Ordering Attorney** – Check this box if this contact will be signing the Notice. The maximum number of ordering attorneys you can have on a case is two.
 - **Opposing Side Attorney** – Check this box if this contact is on the opposite side.
 - **Patient’s Attorney** – Check this box if this contact represents the patient.
 - **Allow case-level repository access in MRWeb** – If checked, this party will be able to access case-related documents stored in the repository. It is checked by default.
 - **Allow part-level repository access in MRWeb** – If checked, this party will be able to access part-related documents stored in the repository.
 - **Allow item-level repository access in MRWeb** – If checked, this party will be able to access item-related documents (actual records received) stored in the repository. You should leave this checkbox blank unless this party is a co-counsel to the scheduling party.

- **Allow Order Progress access in MRWeb** – If checked, this party will be able to view the current status of the parts of their orders.
 - **Web Access Only** – If you are adding a party who is not an attorney of record (e.g., adjuster), check this box.
4. Click the **Billing Info** tab to enter:
 - **Billing Rate Group** – The default comes from the setting in the contact’s profile. (See “Setting up contacts.”)
 - **Billing Rate** – Click the binoculars button to select a rate table to apply for this party.
 - **Same as Sold To** – Check this box if invoices are to be sent to this party. Otherwise, leave the checkbox blank, and select a different firm and contact in the **Bill To Firm** and **Bill To Contact** fields.
 - **Client Matter No.** – If provided by the client, this number will be printed on the invoice.
 - **Direct Billing Notes** – 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 the claim number, name of insured and date of loss.
 - **Client ID** – If you will be billing the party electronically, enter their ID number here. When exporting invoices in LEDES 1998B format, this entry will be used for CLIENT_ID. See “Electronic billing.”
 5. Click **Save and Close**.
 6. Repeat steps 2 through 5 to add additional parties.

Case Manager

Entering requested services

As you set up parties involved on a case, you can enter services requested by each party, such as Bates numbering or tabs.

1. In the Case window, click a party on the top grid to select it.
2. In the **Services Requested** section, click **New**.
3. In the New Service window, enter the following information:
 - **Service Subgroup** – Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Item** drop-down below.
 - **Service Item** – Select a service item in the drop-down.
 - **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).
 - **Delivery Method** – Select a method of delivery in the drop-down.
 - **Special Instructions** – Enter a note for the production or shipping department.
4. Click **Save and Close**.
5. Repeat steps 2 through 4 to add additional services.



TIP

Instead of entering one service item at a time, speed up your process by selecting a group of service items at once from a preset list. Click **Prefill Services**. In the Prefill Services window, your contact’s standing orders (if any) appear in a grid grouped by firm and contact. Select all of the service items being requested by the contact for this job, then click **Save and Close**.

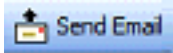
Case Manager

Sending email to case parties

You can send group emails to selected parties on a case from within Case Manager.

1. In a Case window, click the **Parties** tab.

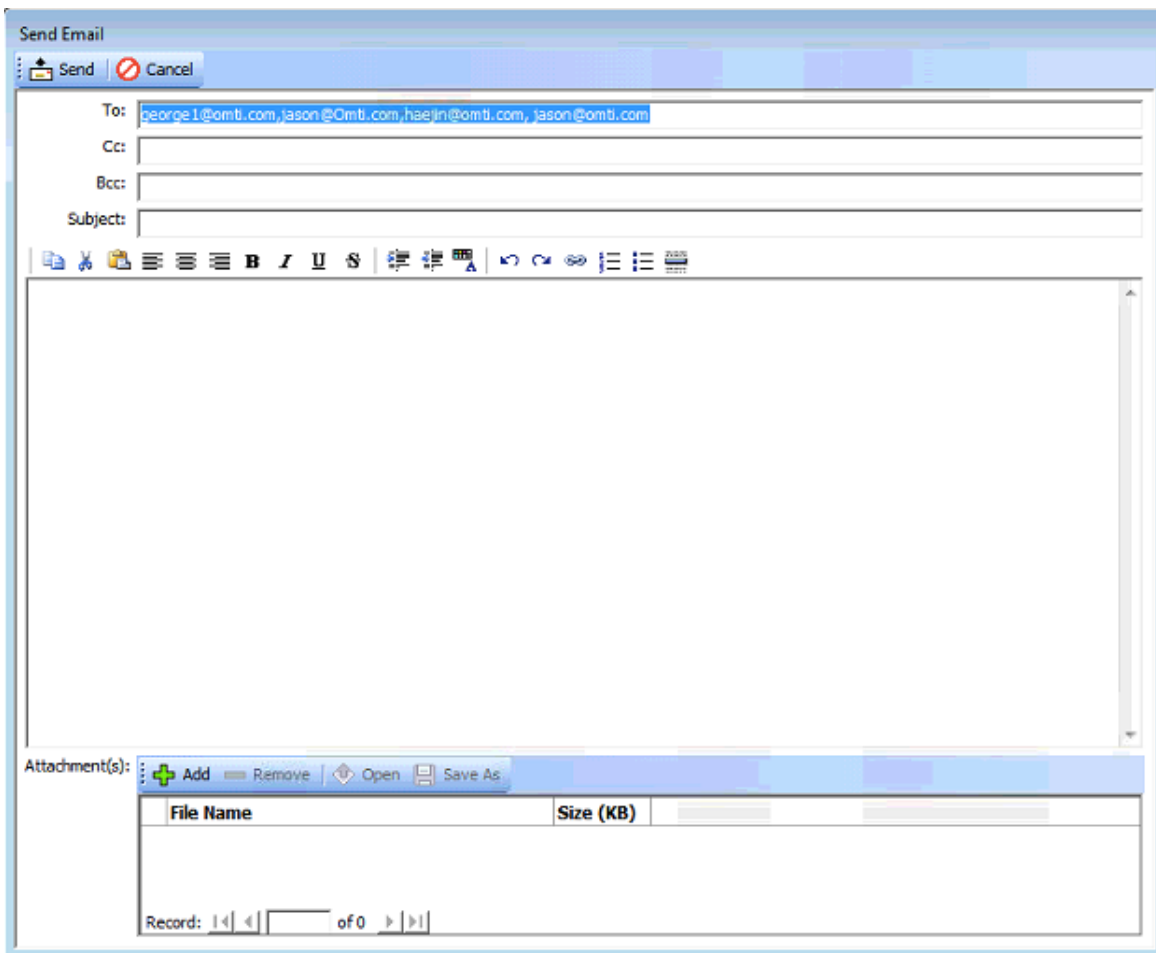
2. Click **Send Email**.



3. In the Select Parties window, all parties listed are automatically selected. Uncheck the **Include** box for anyone you do not want to send the email to.

4. Click **Select**.

5. In the Send Email window, all the selected parties' email addresses are listed in the **To** field. Enter a title for the email in the **Subject** field, and your message in the message field.



6. If you want to attach files to the email, click **Add** in the **Attachments** field. Then find and select the file(s) you want to include and click **Open**.

7. Click **Send**. When the emails have been sent, a popup appears. Click **OK**.

Case Manager

Applying one set of rates to multiple parties

Specifying a billing rate table for every single party on a case can be a time-consuming and tedious chore when you have many parties. Use the Set Rates function to speed up this task.

1. In the Case window, click the **Parties** tab.

2. Click **Set Rates**.



3. In the Set Rates window, click the binoculars button to select a billing rate table.

4. Click **Check All** to select all of the parties listed. Or check the **Update** box next to each party you want to attach to this billing rate table.



5. Click **Save and Close**.

Case Manager

Changing existing cases

When you need to make changes to cases, use Case Manager to quickly locate the cases first.

1. On the menu bar in MR8, click **Orders > Case Manager** (or press **F2**).

2. In the Search Criteria pane, provide information for one (or more) of the filters, then click **Search** (or press **Alt + S**).



TIP

If you search by Patient DOB (date of birth) in Case Manager and get time-out messages, select a higher number in the Command Timeout drop-down in **Personal > User Preferences > Database**. Due to HIPAA regulations, patients' birth dates are encrypted in MR's database, so searches using birth dates take longer. Increasing the wait time for processing searches eliminates the time-out messages.

3. MR8 lists all of the cases that meet the specified search conditions. Double-click the case you want to update.
4. In the Case window, you can make any necessary changes.



TIP

If you have to update the same information in more than one case, for example, you are changing the Client Rep for multiple cases, use **Bulk Update**. See “Updating multiple entities at once.”

Case Manager

Changing case status

If an entire case is cancelled, put on hold or dismissed, change the status at the case level, not at the part (work order) level.

1. In the Case window, click **Actions > Change Status**.
2. In the Change Case Status window, enter the following information:
 - **Status To Be** – Select a new status in the drop-down.
 - **Remarks** – Enter a description explaining the status change.
3. Click **OK**.

Case Manager

Creating new cases from old cases

If you are entering a new patient on a continuing case (e.g., class action lawsuit), save time and reduce errors by copying an existing case and entering only the new information.

1. In Case Manager, highlight the case you want to copy from, then click **Copy**.
2. In the Case window, make any necessary changes. The patient information is not copied, so click the **Records Of** tab and enter the new patient’s information.
3. Click **Save and Close**.



TIP

If you have a new case from an existing client, you can just copy the contact information to a new case in Case Manager. Highlight the case you want to copy from, then click **Actions > New for this Contact**. In the New Case window, all of the contact fields will be filled in, including **Client Rep**. Enter the new case information, then click **Save and Close**.

Case Manager

Creating new work orders (adding parts)

Once a case is created and the parties entered, you can start creating parts (work orders) for the case.

1. On the menu bar in MR8, click **Orders > Case Manager** (or press **F2**).
2. Search for the case you want to add parts for.
3. With the case highlighted at the top grid, click **New** in the Parts section (located on the bottom grid).
4. In the New Part window, enter the following information:
 - **Location – (required)** Click the binoculars button to search for the location (custodian).
 - **Contact** – The default comes from the selected location. Enter a different name, if applicable.
 - **Record Type** – Select a record type in the drop-down.
 - **Rush** – If the case is rush, this box will be checked by default.
 - **Order Date** – The default is today’s date.
 - **Due Date** – If left blank, MR8 automatically calculates this date by adding the **Order Due In** days to the Order Date. (See “Setting up business units.”)



TIP

Case Manager, Task Manager, Notify Runners, Daily Calendar Audit, and Orders in Progress include a Part Rush column in their main grids, so you can see at a glance which parts are rush orders.

5. Click the **Additional Info** tab to enter:
 - **Subpoena For** – Select what is being requested in the drop-down.
 - **Serve By** – Select how the legal papers will be served on this location in the drop-down. The default comes from the setting in the location’s profile. You can add more Serve By options in Code Manager. (See “Setting up locations” and “Adding drop-down entries.”)
 - **Instructions** – Select a special instruction concerning evidence (e.g., admissible) in the drop-down.
 - **Depo Date** – Enter the date (and time) of the deposition, either oral or written.
 - **Action Type** – This field, along with **Action Date**, is used to enter a follow-up date when contacting this location. (See “Scheduling pickups.”)
 - **Ordered As** – If the actual name of the location turns out to be different from what the client ordered, enter the original location name here.
 - **Status Notes** – Enter a description concerning the current status of this part. This text will appear on the Status Progress Report and MR Web. (To enter status notes into multiple parts at once, see “Adding status notes to multiple parts simultaneously.”)



TIP

Because anything written in **Status Notes** can be read by your clients, click **Spell Checker** after writing any notes here to have MR8 spell check your entry.

6. Click the **Forms** tab to enter:
 - **Service Date From/To** – If the scope contains a service date range, enter the beginning and ending date.
 - **Scope** – Click the binoculars button to select from the predefined scopes. Once selected, you can edit the text, if necessary.

- **Scope Attachment** – If you prefer to attach the scope as an exhibit or have a supplemental scope form, click the binoculars button to select from the predefined attachments. These attachments must be MR8 forms created using Form Manager. (See “Creating forms and letters.”)
 - **Interrogatory** – Click the binoculars button to select from the predefined interrogatories.
7. Click **Save**. Five more tabs—**Services, Fee Checks, Part-level Repository, Status Log** and **Notes Log**—appear, and the **Tracking** tab posts the default first step to be taken in the Step Log. To edit the step, see “Moving work to the next step.”
 8. Click the **Part-level Repository** tab to upload any documents you have for this part to the central repository.
 9. Click **Save and Close**.
 10. Repeat steps 3 through 9 to add additional parts.



NOTES

Services is where you record billable services as they occur for the billing department to generate invoices. See “Entering services to be billed.”

Status Log automatically tracks status changes made to parts include who made the change and when. It is not editable. Status notes written on the Additional Info tab do not appear here.

Notes Log is where you enter notes for your internal company use only. See “Making notes.”



TIP

If you only want to add remarks/notes to the default tracking step in the Step Log on the **Tracking** tab, click **View**, then enter up to 2014 characters in the Remarks field and click **Save**.

Case Manager

Adding status notes to multiple parts simultaneously

If you want the same information in Status Notes to appear in multiple parts (work orders) you have for the same case, instead of retyping it or copying and pasting, use this function in Case Manager.

1. With the case highlighted in the top grid, double-click a part you want to add notes to in the bottom grid.
2. On the **Additional Info** tab of the Part window, click **Add Status Notes to other Parts** under **Status Notes**.
3. In the Add Status Notes window, click **Replace Status Notes** or **Append Status Notes** to either overwrite any existing status notes or add this note to what already exists. If you choose to append, select a separator in the drop-down.
4. Enter the common information in **Status Notes**, then click **Spell Checker** to have MR8 spell check your entry.
5. Under **Add to**, check the **Add** box for the parts you want the above status notes to appear in, or click **Select All**.
6. Click **Save and Close**. Then click **OK** in the pop-up that appears. The information from the Add Status Notes window appears in the open part’s Status Notes as well as in the Status Notes of any of the parts you had selected in the Add Status Notes window.

Case Manager

Changing existing parts

When you need to make changes to a part, use Case Manager to quickly locate the case first. (See “Changing existing cases.”)

1. With the case highlighted in the top grid, double-click the part you want to edit in the bottom grid.
2. In the Part window, make any necessary changes.



TIP

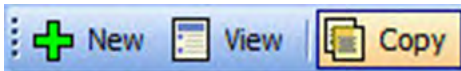
If you have to update the same information in more than one part, for example, the depo date changed for multiple parts, use **Bulk Update**. See “Updating multiple entities at once.”

Case Manager

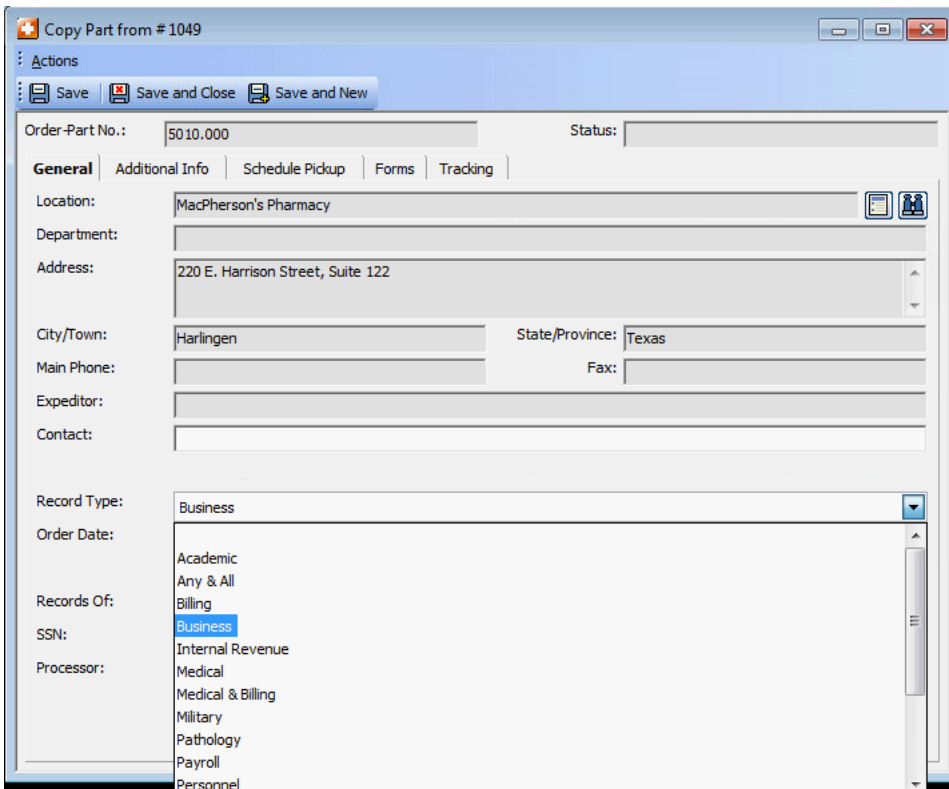
Creating new parts from old parts

If you are getting records from several departments of a major hospital, you might have to create a separate work order for each record type (department). Save time and reduce errors by copying an existing part and entering only the new information.

1. In Case Manager, highlight the part you want to copy from, then click **Copy**.



2. In the Copy Part window, select a different **Record Type**.



3. Click the **Forms** tab to change the scope and interrogatory.
4. Click **Save and Close**.

Case Manager

Changing part status

If work orders are cancelled, put on hold or their subpoena quashed, you can quickly change the status of the parts.

1. In Case Manager or Orders in Progress, select the part(s) you want to change the status of, then right-click or click Action and choose **Change Part Status**.
2. In the Change Part Status window, enter the following information:
 - **Status To Be** – Select a new status in the drop-down.
 - **Remarks** – Enter a descriptive text explaining the status change.
3. Click **OK**.



NOTE

If you want to delete parts, select Deleted in the **Status To Be** drop-down and enter a description explaining the deletion in **Remarks**. To leave an audit trail, MR8 does not physically remove parts when you delete them. Instead, they remain in the system with their status of Deleted, and their part numbers will not be reused.

Case Manager

Adding services to multiple parts at once

Insert a service item into all selected parts of a case at once.

1. In Case Manager, select the parts you want to add the same service to, then choose **Bulk Insert > Service**.
2. In the Bulk Insert > Service window, enter or update the following information:
 - **Service Group** – Select a group in the drop-down. The default is Misc. Charge.
 - **Service Subgroup** – Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Item** drop-down below.
 - **Service Item** – Select a service item in the drop-down.
 - **Units** – Enter the number of units. The default is “1.”
 - **Split %** – If several parties are sharing the cost of this service item, enter the percentage allocated for this party (e.g., “50.000” for one half or “33.333” for one third).
 - **Remarks** – Enter any other information about the service item for the parts.
3. Click **Save and Close**, unless you have additional services to add to the same parts, then click **Save and New** and repeat steps 2 and 3.

Case Manager

Printing forms individually

With MR8’s built-in word processor, forms are now merged and printed instantaneously. Normally, you print forms in batches using packages. However, you can print one form at a time by selecting from MR8’s extensive list of forms.

1. In Case Manager, right-click the case (or part) you want to print forms for, then choose **Print Forms**.
2. The Print Forms window appears. In the **Locations** section, select the parts to be included. Click **Check All** to select all parts at once.
3. Check the **Consolidate Locations** box to print all of the selected locations on a single form (this is normal). Otherwise, MR8 will print each location on a separate form.

Consolidate Locations

4. In the **Parties** section, select the parties to be included. Click **Check All** to select all parties at once.
5. In the **Forms** section, enter the following information:
 - **Print Option** – Select One at a time in the drop-down.
 - **Form Type** – Select a form type (main category) in the drop-down.
 - **Form Group** – Select a form group (subcategory) in the drop-down. If this is a federal case, only federal form groups will appear.
 - **Form Name** – MR8 lists all of the forms that belong to the specified form type and group. Select a form by clicking it.
6. In the **Send To** drop-down, a destination is automatically selected by MR8 based on the selected form. If necessary, select a different destination, such as Manual. Click **Proceed**.

Send To: Location ▶ Proceed

7. In the Select an output method window, depending on the **Communication Type** setting, MR8 defaults to one of three options: Print, Fax or Email. If you want to preview the form before sending it, check the **Preview** box.

	Print	Fax	Email	Preview	Form	Send To	Send To Name
▶	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Affidavit-Federal-No Recs For 5002.002	Location	Dr. Steven Jacobs

8. Update the output options at the bottom of the window, if needed, then click **Send**.



TIP

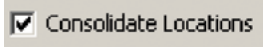
Check the **Show mail composer for Email** box (at the bottom left) if you want to personalize the subject line and the body of the email message for each recipient.

Case Manager

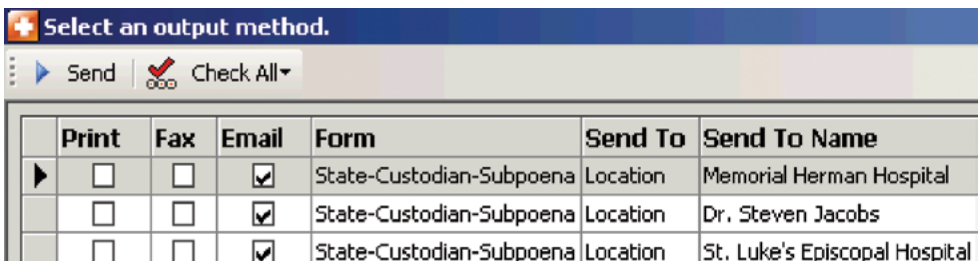
Printing forms using packages

Packages are preset groups of forms that speed up the document printing process because you only have to choose the package to print, not each of the individual forms.

1. Right-click the case (or part) you want to print forms for, then choose **Print Forms**.
2. The Print Forms window appears. In the **Locations** section, select the parts to be included. Click **Check All** to select all parts at once.
3. Check the **Consolidate Locations** box to print all of the selected locations on a single form (this is normal). Otherwise, MR8 will print each location on a separate form.



4. In the **Parties** section, select the parties to be included.
5. In the **Forms** section, enter the following information:
 - **Print Option** – Select By Package in the drop-down.
 - **Package** – Select a package in the drop-down. The forms that will be printed appear in the grid below the **Package** drop-down.
6. Click **Proceed**.
7. In the Select an output method window, depending on the **Communication Type** setting, MR8 defaults to one of three options: Print, Fax or Email. There is no preview option in package printing (see tip below).



8. Update the output options at the bottom of the window, if needed, then click **Send**.



TIP

If you want to preview the package before sending it, check the **Show mail composer for Email** box. In the mail composer window, right-click the PDF file in the Attach box, then choose **Open**.



NOTE

While MR8 is batch processing, such as when outputting form packages, grid sorting is locked.

Case Manager

Entering waiver responses

In MR8, a *waiver* doubles as a copy order form. As waivers come back from the parties (attorneys of record), record their responses and upload the forms to the repository. MR8 uses this information to pre-fill the billing parties in Turn-in.

1. In the Case window, click the **Parties** tab.
2. Double-click the party you want to enter a waiver response for.
3. Click the **Waiver Response** tab.
4. Check the boxes in the **Waived** and **Copy** columns. Click **Check All** to select all parts at once in each column.

Part No. ▲	Location	Waived	Copy
1	Memorial Herman Hospital	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Dr. Steven Jacobs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	St. Luke's Episcopal Hospital	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	Sugar Land Imaging Center	<input type="checkbox"/>	<input checked="" type="checkbox"/>

5. Click **Save and Close**.
6. Click the **Case-level Repository** tab and upload the signed waiver form for future reference. (See “Uploading files.”)



BEST PRACTICES

Having the signed waivers (i.e., copy order forms) in the repository will help your collection efforts. When clients refuse to pay invoices claiming they did not order copies of records, you can quickly prove otherwise by emailing them a copy without spending hours looking through filing cabinets.

Case Manager

Scheduling pickups (set desk)

Each time you contact a custodian to make an arrangement for records, you should record the outcome. In addition, you can set a follow-up date, if further actions are required.

1. In the Part window, click the **Schedule Pickup** tab to enter:
 - **Scheduled Date** – Enter the date of the pickup or mailing.
 - **Scheduling Type** – Select a type (e.g., Pickup or Mail) in the drop-down.

- **Runner** – Click the binoculars button to assign a runner for the pickup.

The screenshot shows a software interface for a part with ID 5002.001. The 'Schedule Pickup' tab is active. The 'Order-Part No.' is 5002.001 and the status is 'In Progress'. The 'Scheduled Date' is set to 11/12/2007 with a checkmark, and the 'Scheduling Type' is 'Pickup'. The 'Scheduling Notes' field contains the text 'Records will be available from 10 to 4.'. The 'Runner' field is populated with 'Igor Kimuski'. The 'Pickup Notes' field contains 'Bring own copier and \$37.50'. At the top, there are 'Save', 'Save and Close', and 'Save and New' buttons.

2. Click the **Additional Info** tab to enter:

- **Action Type** – Select an action in the drop-down.
- **Action Date** – Enter the next action date. You can pull up work orders based on this date using the Task Manager function. (See “Generating a task list.”)

This screenshot shows two fields: 'Action Type' with a dropdown menu set to 'Contact Field Agent' and 'Action Date' with a date field set to 11/13/2007 and a checkmark.

3. Click the **Notes Log** tab and make a note.



NOTES

MR8 makes an automatic entry in the Part Notes Log when a runner is added/changed/deleted.

Action Type and **Action Date** appear in the Parts grid in the Case Manager.

Case Manager

Entering check requests

If the custodian requires a payment for producing records, you can enter a fee check request while you are scheduling a pickup or mailing.

1. In the Part window, click the **Fee Checks** tab.
2. Any checks already issued are listed. Click **New**.
3. In the New Check window, the **Check Date** defaults to today.
4. In **Payment Type**, select Check or Credit Card in the drop-down.
5. If you selected Check:
 - **Check Date** – Default is today. Change if needed.
 - **Check Amount** – Enter the amount of the custodian fee.
6. If you selected Credit Card:
 - **Credit Card No.** – Enter the payee’s credit card number (numerals only, no spaces or dashes) or select in the drop-down.
 - **Pay Date** – Default is today. Change if needed.
 - **Amount** – enter the amount of the custodian fee.
7. Enter the following information:
 - **Account No.** – The default is the Custodian Expenses account number specified in the Business Unit. (See “Chart of Accounts” and “Business Units.”)
 - **Custodian Fee Name** – Select the category in the drop-down. Custodian Fee Names are set up in Code Manager. (See “Adding drop-down entries.”)
 - **Payee** – The default is the custodian (Same as Location). If you are paying a vendor, select Firm in the drop-down and click the binoculars button to select the vendor from the Firms table. If you are paying another location (e.g., ROI handled by), select Other Location in the drop-down and click the binoculars button to select the location.
8. Click **Save and Close**.

Case Manager

Receiving records individually

As soon as records are received, enter the information to update the part status, even if the production department hasn't started paginating the records yet. The actual page count can be entered later when you do turn-in.

1. In Case Manager, right-click the part (in the bottom grid), then choose **Receive Records**.
2. If this is the first time you are receiving records for the part, a dialog box appears. Click **OK** to proceed. Otherwise, all of the records received so far appear in the grid to stop you from making duplicate entries.
3. Right-click on the grid, then choose **New**.
4. In the New Record window, the **Received Date** defaults to today. Enter the following information:
 - **No Record** – Check this box if Affidavit of No Records (ANR) is received.
 - **Record Type** – The default is the record type specified originally for the part. Select a different record type, if necessary.
 - **Pages** – Enter the page count, if known.

New Record

Actions

Save Save and Close Save and New Delete

Order-Part No.: 5002 4 Search

General

Records Of: Yong B. Lee

SSN: 549-11-0000 Date of Birth: 3/26/1953

Location: Sugar Land Imaging Center

Received Date: 11/20/2007 No Record

Record Type: Radiology

Pages: 2

Begin Page No.: 1 End Page No.: 2

Remarks: picked up by AJ.

5. Click **Save and Close**. The part status changes to Records Obtained.

Print Certified Mail Cards

Printing certified mail cards

Print Domestic Return Receipts (PS Form 3811) for custodians or attorneys who require them.



NOTE

Before printing, set your printer to a custom paper size of 3.5 inches width by 7 inches height.

1. On the menu bar in MR8, click **Orders > Print Certified Mail Cards**.
2. Enter the order number in **Order No.**, and click **Search**.
3. Check the **Select** box for any locations or parties you want to send return receipts to.
4. Right-click the grid and select **Print Certified Mail Cards**.
5. In the Save the file as, navigate to where you want to save the file, name the file in **File Name** and click **Save**.
6. In the pop-up, click **OK**.



TIP

If the MR8 information does not print in the correct place on your certified mail card, you can alter its placement. In the Print Certified Mail Cards window, right-click the grid and select **Alignment Setup**. In the Alignment Setup window, use the key at the top as a guide to decide which values to alter in the **Addresses Top**, **Addresses Left**, **Case Info. Top**, and **Case Info. Left** fields.

Alignment Setup

SENDER: COMPLETE THIS SECTION

- Complete items 1, 2, and 3. Also complete item 4 if Restricted Delivery is desired.
- Print your name and address on the reverse so that we can return the card to you.
- Attach this card to the back of the mailpiece or on the front if space permits.

1. Article Addressed to:

Addresses
(Location or Attorney)

2. Article Number
(Transfer from service label)

PS Form 3811, August 2001 Domestic Return Receipt 2ACPRI-03-P-4081

COMPLETE THIS SECTION ON DELIVERY

A. Signature Agent Addressee

B. Received by (Printed Name) C. Date of Delivery

D. Is delivery address different from item 1? Yes
if YES, enter delivery address below: No

3. Service Type

Certified Mail Express Mail

Registered Return Receipt for Merchandise

Insured Mail C.O.D.

4. Restricted Delivery? (Extra Fee) Yes

Case Info.
(Patient/Order#/Processor)

Use this key to set the vertical and horizontal position of printable items on certified mail cards by changing the values in the numbered fields until the output lines up with your printed certified mail cards.

You must also set your printer to custom paper size, 3.5 width and 7 inches in height.

<1> Addresses Top	<input type="text" value="1.30"/>	<3> Case Info. Top	<input type="text" value="1.40"/>
<2> Addresses Left	<input type="text" value="0.80"/>	<4> Case Info. Left	<input type="text" value="3.60"/>

Restore Default OK Cancel




Receive Records

Receiving records in batches

If you have someone (such as a receptionist) who enters all of the received records as he or she opens the daily mail, start with the Receive Records function instead of Case Manager.

1. On the menu bar in MR8, click **Orders > Receive Records**.
2. Right-click on the grid, then choose **New**.
3. In the New Record window, enter an order number and part number, then click **Search**.

Order-Part No.:	5002	2	 Search
-----------------	------	---	--

4. Enter the following information:
 - **No Record** – Check this box if Affidavit of No Records (ANR) is received.
 - **Record Type** – The default is the record type specified originally for the part. Select a different record type, if necessary.
 - **Pages** – Enter the page count, if known.
5. Click **Save and New**.



6. Repeat steps 3 through 5 to receive additional records.

Generating a task list

A *Task List* (also a to-do list or call list) is a list of work orders (parts) to be worked on. Since every records retrieval business operates differently, MR8 provides numerous filters to accommodate every need. Using the Task Manager function, you can bring up work orders:

- For either processing serving or records retrieval.
- That are currently at certain tracking steps.
- That are assigned to a particular individual.
- Based on part status.
- Based on certain action type(s) and a date range.
- Based on order date, due date, follow-up date, start date, waiver date or scheduled date.
- That belong to a particular processor, client rep, runner or business unit.
- Based on location postal code or ROI Handled By.
- By schedule type.
- For a single case.

1. On the menu bar in MR8, click **Orders > Task Manager**.
2. In the Search Criteria pane, specify the filters. Click **More options** to display additional filters that are normally not visible.



3. Click **Search** (or press **Alt + S**).
4. MR8 lists all of the work orders that meet the specified search conditions. Double-click any work order to view its details or right-click any work order(s) and choose any of the following commands:
 - **Change Tracking Step** – To move the selected work order(s) to the next step in the workflow. (See “Moving work to the next step.”)
 - **Change Part Status** – To change the status of the selected work order(s). (See “Changing part status.”)
 - **Request Check** – To generate a check request for the selected work order. (See “Entering check requests.”)
 - **Fee Checks** – To pull up all of the checks issued so far for the selected work order.
 - **Assign Runner** – To assign a runner (field agent) to the selected work order(s). In the Lookup User window, find and select the runner. Then click **OK** in the pop-up.
 - **Remove Runner** – To remove a runner from the selected work order(s).
 - **Notify Runner** – To send a notification to the runner assigned to the selected work order. (See “Notifying runners.”)
 - **Print Forms** – To print forms for the selected work order. (See “Printing forms individually.”)
 - **Receive Records** – To receive records for the selected work order. (See “Receiving records individually.”)
 - **Turn-in** – To start the billing process for the selected work order. (See “Updating items.”)



NOTE

You can also access this list of commands by right-clicking any part in the Parts grid in Case Manager.

Moving work to the next step

When the work is completed in the current step, you “push” the work order to the next step in the workflow.

1. In the Task Manager window, right-click the work order(s) you want to move to the next step, then choose **Change Tracking Step**.
2. In the Change Tracking Step window, enter the following information:
 - **Next Step** – The default is the next step in the workflow. You can select a different step in the drop-down to move forward or backward, skipping any steps.
 - **Assign To** – Click the binoculars button to assign the selected work order(s) to a particular individual, if applicable.
 - **Step Due Date** – The default is calculated based on the Due Days specified in **Setup > Tracking Steps**. (See “Setting up tracking steps.”)
 - **Publish** – The default is the setting specified in **Setup > Tracking Steps**. If checked, this step will be visible to clients on MR Web.

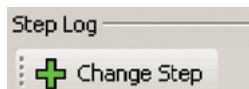
3. Click **OK**.



TIP

You can also move work to the next step in two other ways:

1. In Case Manager, right-click the part(s) you want to move to the next step, then choose **Change Tracking Step**. Continue as above.
2. In Case Manager or Task Manager:
 1. Double-click a part/work order you want to move to the next step.
 2. In the Part window of an individual part, click the **Tracking** tab. In the Step Log section, click **Change Step**.



3. If you changed the **Item** category in the Part window before clicking **Change Step**, a popup will direct you to select a corresponding **Tracking Step** that relates to the new tracking item category. Select the correct step in the **Tracking Step** drop-down and click **OK** to close the popup.
4. Continue as above. The only drawback to this approach is that you can select only one work order at a time.

Task Manager

Entering services to be billed

As work orders move through the various departments, you can record billable services as they occur so that the billing department has complete and accurate information to generate invoices.

1. In the Part window, click the **Services** tab.
2. Click **New**.
3. In the New Service window, enter the following information:
 - **Service Subgroup** – Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Item** drop-down below.
 - **Service Item** – Select a service item in the drop-down.
 - **Units** – Enter the total number of units to be billed.
 - **Billing Rate** – Enter the unit price, if known at this time.
 - **Split %** – If several parties are sharing the cost of this service item, enter the percentage allocated for this party (e.g., “50.000” for one half or “33.333” for one third).

4. Click **Save and Close**.

**NOTE**

All of the service items entered here will be automatically added to the scheduling attorney's invoice when you use the pre-fill option in Turn-in.

**TIP**

After entering service items on a part, you can quickly copy one or more services to other parts in the same case. On the Part window's **Services** tab, select the service(s) you want to copy and click **Copy To**. In the Copy To window, check the boxes of all parts you want to include the service(s) on, then click **Copy**. When the services have been copied, a popup appears. Click **OK**.

Notify Runners

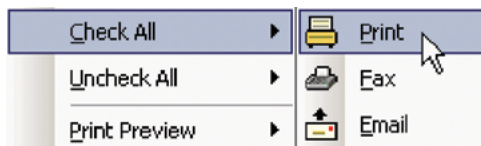
Notifying runners (field agents)

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

1. On the menu bar in MR8, click **Orders > Notify Runners**.
2. In the Search Criteria pane, **Scheduled Date From** and **Scheduled Date To** default to today. Change the dates if necessary, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the scheduled work orders for the date range selected.

	Print	Fax	Email	Runner	Order-Part No.	Processor	Scheduled Date	Scheduling Type
▶	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Igor Kimuski	5002.001	Alicia Smith	11/21/2007	Pickup
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Igor Kimuski	5005.001		11/21/2007	Pickup
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Larry Shoemaker	1002.002	Larry Shoemaker	11/21/2007	Pickup
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Larry Shoemaker	5002.004	Alicia Smith	11/21/2007	Pickup

4. Click **Actions > Check All**, then choose Print, Fax or Email.



5. Click **Actions > Notify**.



USAGE EXAMPLE

<u>Runner Worksheet</u>			
Runner	Igor Kimuski		
Scheduled Date	11/21/2007	Scheduling Type	Pickup
Scheduling Notes	Records will be available from 10 to 4.		
Pickup Notes	Bring own copier and \$37.50.		
Order-Part No.	5002.001	Order Date	10/16/2007
Processor	Alicia Smith	Client Rep	Joan Wells
Ordering Client	Daniel Berg Berg Steiner Chapman LLP		



NOTE

MR8 makes an automatic entry in the Part Notes Log when a runner is notified.

Orders

Additional tools for order processing

MR8 provides several preset reports designed to give you quick and easy means to analyze the order-processing side of your business.

Daily Orders Audit

Do you want to find out how many work orders been added to the system today or this week? What about cancellations? Analyze new and cancelled work orders with MR8's Daily Orders Audit. Plus, audit new entries for typos and other mistakes.

Orders in Progress

Use the Orders in Progress function to analyze processors' workloads. It lists the backlog of work orders a processor is working on with the age (number of days old) for each work order. If you specify a part due date range, only work orders having the same or prior due date will be listed. This report is valuable even if your firm does not use the "Processor" feature.

Processed Orders

This report lists all work orders "processed" (including the invoice date) for the specified period, grouped and subtotaled by order date. By default, MR8 selects all work orders except cancelled ones as "processed," but you can modify the selection in the Search Criteria pane.

Orders Turnaround

Use the Orders Turnaround function to see part turnaround information and invoices for a specified time period.

Order Analysis

Since many cases are now billed to insurance companies, not to the attorneys who requested the records, you cannot look at your billing records to determine where your business is coming from. MR8's Order Analysis function counts new and cancelled work orders by firm, broken down by contact, so you can see how many work orders you are getting from each client.

Chapter 5: Production

Turn in work orders and prepare them for billing in Production. You can also produce envelopes and labels here, and archive and manage files in the central repository.

Functions covered in this chapter:

Turn-in

Production Sheets

Envelopes and Labels

Repository

Log Analysis

Productivity Analysis

Daily Task Summary





Turn-in

Creating an invoice involves two separate parts: *Turn-in* and *Billing*. In Turn-in, you enter information about items (records received), firms to bill, and miscellaneous charges. Turn-in is usually performed by your production department when they receive a tracking alert indicating that records have been received and are ready to be produced for a particular work order.

Turn-in

Updating items

In MR8, an *item* represents a set of records you obtained that will be produced and billed together as a unit. For example, if you receive 30 pages of medical records first, then two weeks later receive ten pages of billing records from the same custodian, you could end up with two items for the work order. However, if you wait until all 40 pages are received before you bill, you can combine them all into one item for the work order.

An item is created when a processor (or receptionist) performs the Receive Records function for the work order. (See “Receiving records individually.”) However, the item will have no page count until the production department does the pagination. So, the first step in turning in a work order is to update the item by entering the total page count. Then you can scan and upload records to the repository so that your clients can access them on MR Web.

1. On the menu bar in MR8, click **Production > Turn-in** (or press **Ctrl + T**).
2. In the Search Criteria pane, enter the order number, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the work orders that belong to the specified case. (If you are adding the same service item to multiple parts for the same contact, use **Actions > Bulk Turn In**. See “Creating invoices for multiple parts at once.”)
4. Double-click the work order (part) you want to turn in.
5. In the Turn-in window, window’s first quadrant, Step 1. Add items, double-click the item you want to update.
6. In the Received Record window, enter the total number of pages, and beginning page number.
7. Click the **Item-level Repository** tab to upload exhibits. (See “Uploading files.”)
8. Click **Save and Close**.



NOTE

If the item has not been created for the work order yet, you can click **New** in Turn-in to create it yourself. For example, you might be billing for something that is not records related, such as process serving.

Turn-in

Adding parties automatically

After updating item information, the next step is to enter *ordering parties*. You can add all of the ordering parties (i.e., contacts) with a single click by using a list from the waiver responses. (See “Entering waiver responses.”)

Using an existing list of parties not only saves time here, but can also eliminate the next two steps because it copies order and service item information too. For every party entered here, MR8 generates an invoice.

1. In Step 2. Prefill parties, click **Prefill Parties**.
2. In the Prefill Parties window, all of the parties who sent back the waiver ordering a copy and who have been set up in MR8 with a billing rate table are listed with the **Add** box already checked. If necessary, you can uncheck the box next to any party you do not want to generate an invoice for at this time.

Add	Sold To Firm	Sold To Contact	Sched...	Bill To Firm
- Item: 1/25/2008 (1 Items)				
<input checked="" type="checkbox"/>	Bergan & Bergan	Jeffrey Bergan	<input checked="" type="checkbox"/>	Bergan & Be
- Item: 1/31/2008 (1 Items)				
<input checked="" type="checkbox"/>	Bergan & Bergan	Jeffrey Bergan	<input checked="" type="checkbox"/>	Bergan & Be

Record: 1 of 2

Consolidate Invoices

The following parties do not have Billing Rates:

Sold To Firm	Sold To Contact	Sched...	Bill To Firm
Smith & Smith	Mary Jane Smith	<input type="checkbox"/>	

3. MR8 will consolidate all of a firm’s orders on this item, so that they appear on the same invoice. If you do not want these defaults on this item, deselect the **Consolidate Invoices** checkbox.
4. Any parties that submitted a waiver response, but have not been assigned a billing rate table in MR8, will appear in the bottom grid of the Prefill Parties window. MR8 requires a billing rate table before it can create an invoice for any party. Assign a billing rate table to any party listed here before invoicing the item. See note.
5. In the Prefill Parties window, click **Save and Close**.



NOTE

Do the following to specify a rate table for any party appearing in the bottom grid of the Prefill Parties window:

1. In the item’s Turn-in window, click the page button next to the patient name (at the top right).
2. In the Case window, click the **Parties** tab.
3. Double-click the party you want to update.
4. In the Case Party window, click the **Billing Info** tab.
5. Click the binoculars button next to the **Billing Rate** to select a rate table for the party.
6. Click **Save and Close**.

6. The parties appear in Step 2, Step 3 automatically populates with orders set in Step 2, and Step 4 automatically fills with any services requested when parties were set up on a case. (See “Entering orders manually” and “Entering requested services.”)
7. If you want a different message than the default to appear on the invoices, click **Set Messages**. You can either enter a custom message or click the binoculars button to select a message from your previously set messages. In the Parties section, select whom you want to receive the message, then click **Save and Close**.
8. To edit a party’s billing information for this order, double-click the party and enter the following information. When finished click **Save and Close**.
 - **Bill To Contact** – If the billing party is the same as the ordering party, check the **Same as Sold To** box. Otherwise, click the binoculars button to search for the contact to be billed.
 - **COD** – Defaults to the firm’s C.O.D. setting. Override the setting for this order only by checking this box.
 - **Print detail on invoices** – Defaults to the firm’s setting. Override for this order only by checking this box.
 - **Invoice Message** – Defaults to your Invoice Message setting. Override for this order by entering the text you want or click the binoculars button to select a different invoice message in the Lookup Invoice Message window. From there, you can also create additional messages for re-use and change the default message. See “Setting up Invoice Messages.”



NOTE

When you click **Save and Close** in the Prefill Parties window, MR8 creates an invoice for each contact. In addition, MR8 will create a service item, Custodian Fee, for the scheduling party by adding up the check amounts. The markup, if any, is calculated and added to the Custodian Fee at the same time. The Custodian Fee will appear on invoices with details on.

Turn-in

Entering orders manually

After entering items and ordering parties, the next step is to designate which party is ordering which item. An *order* represents one party ordering services associated with one item. Orders are always created automatically in Step 2. (See “Adding parties automatically.”) However, if you delete an order, you can add it back manually.

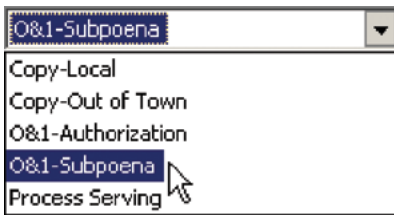
1. In Step 3. Add orders, click the “+” (new) button.
2. In the New Order window, enter the following information:
 - **Item** – Select an item in the drop-down. The drop-down list comes from Step 1.
 - **Sold To Contact** – Select a contact in the drop-down. The drop-down list comes from Step 2.
 - **Billing Rate** – Click the binoculars button. In the Lookup Billing Rate window, all of the billing rate tables for the selected billing rate group appear. Double-click a rate table to select it.
3. Click the **Shipping** tab to enter delivery information. See “Shipping from MR8.”
4. Click **Save and Close**. MR automatically fills in the **Created, Created By, Last Modified** and **Last Modified By** fields.
5. If you want a different header than the default to appear on the invoices, click **Set Headers**. You can either enter a custom header or click the binoculars button to select a header from your previously set headers. In the Orders section, select whom you want to receive the new header, then click **Save and Close**.

Turn-in

Entering service items using billing sets

After designating which party is ordering which item, enter service items for each order. This is the final step of the turn-in process. Instead of entering one service item at a time manually, you can select one of the predefined billing sets to add several service items at once. A billing set is like a box lunch special that contains several popular items, so you do not have to keep selecting the same items individually for each order. (See “Billing Sets.”)

1. In Step 3. Add orders, select an order by highlighting it.
2. Click **Prefill Services**.
3. In the Prefill Services window, select a billing set in the drop-down.



NOTE

If a selected order has previously-entered preferred services at the contact level, firm level and/or case level, the service items are listed in Step 4. Add, copy or prefill services. If the party is not ordering a listed service item, highlight the item and click **Delete**. Then click **Yes** in the pop-up window.

4. All of the service items contained in the selected billing set are listed with **Select** already checked. Uncheck any service items you do not want to include for this order.
5. Click **Save and Close**.

Turn-in

Replicating service items

After entering all of the service items for one order, speed up your turn-in process by copying service items from one order to others.

1. In Step 3. Add orders, select the order you want to copy service items from by highlighting it. Click **Copy Services**.
2. In the Copy Services window, check the **Add** box next to each firm name you want to copy service items to.



3. Click **Save and Close**.



BEST PRACTICES

When you have multiple parties ordering copies of records, their invoices, except for the scheduling party, tend to be similar if not identical. In that case, complete the Orders section (the third section) in the following order:

1. Add service items for the scheduling party who is paying for the original using **Prefill Services**.
2. Add service items for the first party who is paying for a copy using **Prefill Services**.
3. Replicate copy orders quickly with a single click using **Copy Services**.

Turn-in

Adding service items manually

If you have any service items that do not fit into the normal billing sets, add them manually.

1. In the Step 3. Add orders, click an order to select it. MR8 lists all of the service items entered so far for the selected order in Step 4. Add, copy or prefill services.
2. In Step 4. Add, copy or prefill services, click **New**.
3. In the New Service window, enter the following information:
 - **Service Group** – Select a group in the drop-down. The default is Misc. Charge.
 - **Service Subgroup** – Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Item** drop-down below.
 - **Service Item** – Select a service item in the drop-down.
 - **Units** – Enter the number of units. The default is “1.”
 - **Split %** – If several parties are sharing the cost of this service item, enter the percentage allocated for this party (e.g., “50.000” for one half or “33.333” for one third).
 - **Override** – Check this box if you are overriding the billing rate. When you calculate, MR8 uses the billing rate from the billing rate table you’ve selected for this order unless this box is checked.

4. Click **Save and New** to add other service items to the order. When finished adding services, click **Save and Close**.

Turn-in

Shipping from MR8

When clients call to find out where their order is, you don't have to leave MR8 to check the shipping status. You can keep track of when and via what method you send jobs out, and even print labels and follow up an order's current location if sent via FedEx or UPS.

1. In Step 3: Add orders, double-click an order to select it.
2. In the Order window, click the **Shipping** tab.
3. Click **New**.
4. In the New Shipment window, select a method in the **Delivery Method** drop-down:
 - If you select FedEx or UPS then click **Print Shipping Label**.
 - If you select one of the other methods, skip to step 12.
5. In the Print FedEx/UPS shipping label window, **Ship From** fields default to your preferred business unit, and **Ship To** fields default to the Sold To contact. Select a different business unit in the **BU ID** drop-down if needed. If the package is to be sent to the firm that is being billed, select Bill To in the **Contact Type** drop-down.
6. Enter the package's weight in pounds in **Weight (lb)** (required), and select other options. (Some options will incur extra fees from FedEx/UPS.)

7. If you want to include MR8 information on the label, such as the invoice number, job number and/or witness name, check the box(es) under **References**. You can also include other information by entering it in the **Custom Reference** field.

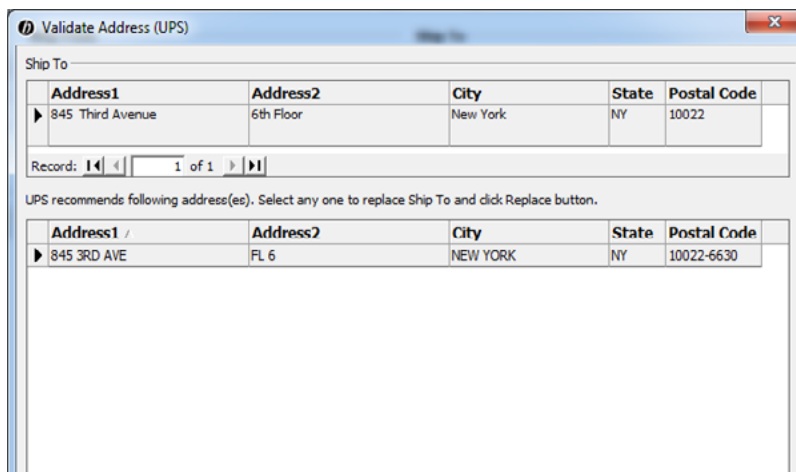
8. If you have a special printer that requires a particular type of file, choose the file type in the **Label Image Type** drop-down. Otherwise, leave it as the default file type.
9. With the **Validate Address** box checked, click **Get Shipping Label**.



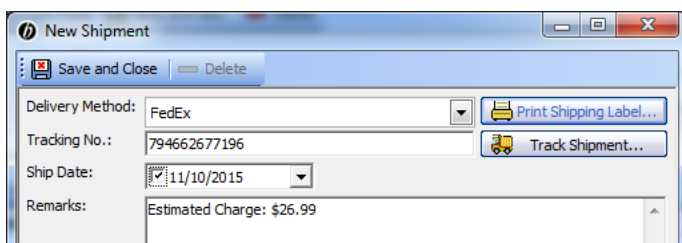
IMPORTANT

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 MR8 System Preferences. (See “Configuring global options,” shipping tab step.)

10. If the Validate Address window appears, any recommended addresses will appear below the Ship To address originally entered in MR8. To print using:
 - The original address, click **Cancel**.
 - A recommended address, click the desired address, then click **Replace** and click **Yes** in the pop-up window that appears.



11. The label appears with the associated program for the file type that you selected in the **Label Image Type** drop-down. Print the label from this screen. Then click the close button on the Print FedEx/UPS label window.
12. After the shipping label prints, the **Tracking No.** and **Ship Date** appear in their respective fields in the New Shipment window, and the estimated shipping charge appears here in **Remarks** and on the Order - [contact] window. To track the shipment, click **Track Shipment** here or in the Order - [contact] window.



13. Enter details or other comments about the shipment in **Remarks**.
14. Click **Save and Close**. Then click **Save and Close** in the Order - [contact] window.
15. Repeat with any remaining orders in Step 3: Add orders.



TIP

To see where a shipment is at any time, click **Track Shipment** on the **Shipping** tab in the Order - [contact] window.

Turn-in

Creating invoices for multiple parts at once

You can add a service item to multiple parts for the same contact simultaneously. For example, you can charge cancellation fees, basic fees or authorization fees for all related parts at once when a specific case settles.

1. On the menu bar in MR8, click **Production > Turn-in** (or press **Ctrl + T**).
2. In the Search Criteria pane, enter the order number, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the work orders that belong to the specified case. Highlight the parts that you want to bulk update.
4. Click **Actions > Bulk Turn In**.
5. On the **Received Record** tab, enter the total number of pages, and beginning page number, if relevant.
6. On the **Invoice** tab, review and revise billing information, if needed.
7. On the **Services** tab, click **New**.
8. Select a service you are adding to all the parts you selected to bulk update. See “Adding service items manually.”
9. After you have entered all service items, click **Create Invoices** in the Bulk Turn In window.
10. MR8 creates the invoices and automatically opens the Billing window. In the MR8 popup windows that appear, click **OK**.



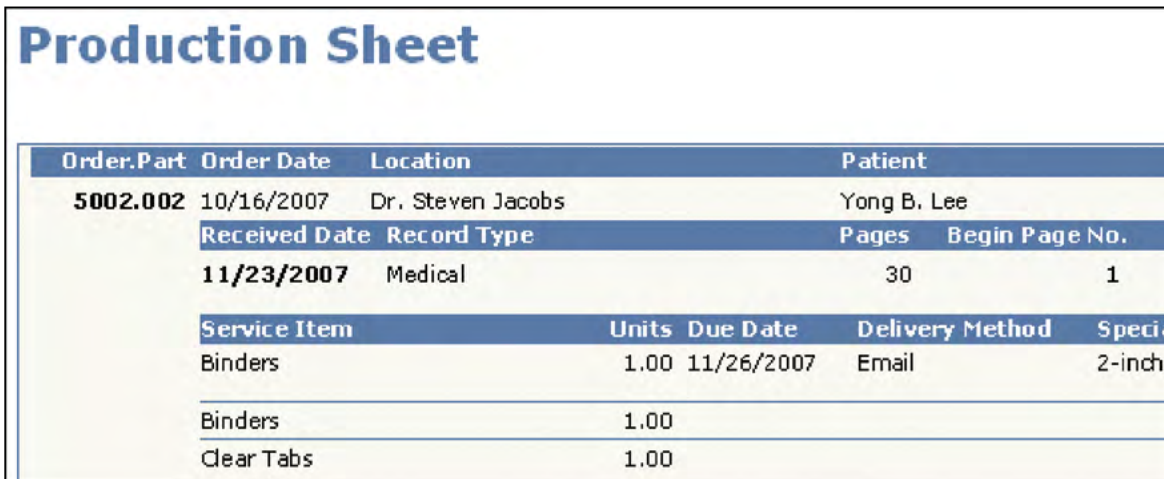
NOTE

You can also access Bulk Turn In by selecting multiple parts in the Parts grid in Case Manager, then clicking **Actions > Bulk Turn In**.

Printing production sheets

After all work orders 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. On the menu bar in MR8, click **Production > Production Sheets**.
2. In the Search Criteria pane, **Received Date From/To** defaults to today. Change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the work orders (along with their service items) that meet the specified search condition(s) as a report.



The screenshot displays a report titled "Production Sheet". It contains a table with the following data:

Order.Part	Order Date	Location	Patient		
5002.002	10/16/2007	Dr. Steven Jacobs	Yong B. Lee		
Received Date	Record Type	Pages	Begin Page No.		
11/23/2007	Medical	30	1		
Service Item	Units	Due Date	Delivery Method	Specia	
Binders	1.00	11/26/2007	Email	2-inch	
Binders	1.00				
Clear Tabs	1.00				

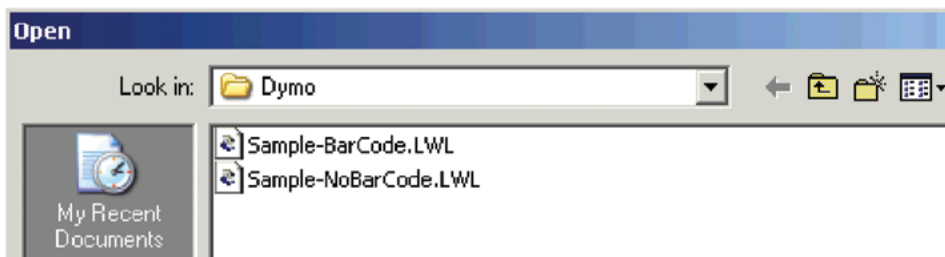
4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see "Exporting reports").

Envelopes and Labels

Printing envelopes and shipping labels

Print addresses on #9 and #10 envelopes, as well as on a variety of DYMO labels for parties, contacts, firms or locations using information from MR8's database.

1. On the menu bar in MR8, click **Production > Envelopes and Labels**.
2. In the Search Criteria pane, select one of the following in the **For** drop-down:
 - **All Locations for Order No.** – To print labels for all of the locations on a specific case.
 - **All Sold To for Order No.** – To print labels for all of the Sold To contacts for a specific case.
 - **Case Parties** – To print labels for all of the parties on a specific case.
 - **Contact** – To print one label for a specific contact.
 - **Firm** – To print labels for all of the contacts at a specific firm.
 - **Location** – To print one label for a specific location.
 - **Manual** – To print one label by entering a name and address manually.
3. Based on the selection made in the **For** drop-down, the **Order** field or a corresponding binoculars button is activated. Enter the order number or click the button to look up a contact, firm or location.
4. Select the type of address, Billing, Firm or Home in the **Send To** drop-down, if visible.
5. Click **Search** (or press **Alt + S**).
6. All of the results that appear in the grid are selected by default. Uncheck the **Select** box for any you do not want to print out.
7. Select a printer in the **Shipping Label** or **Envelope** drop-down.
8. Click **Actions** (or right-click on the grid), then choose **Print Envelope** or **Print Label**.
9. In the Open window (for labels only), click the label type you want to use, then click **Open** (or double-click it).



NOTE

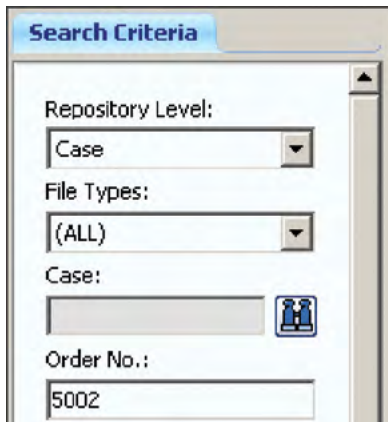
MR8 works with DYMO LabelWriter printers and provides standard templates (.LWL) that can be edited to create your own templates.

Repository

Searching for and viewing archived files

The Production Repository function includes multiple search filters so you can instantly find files within your entire central repository. This can save you time over searching for files within individual entities in other functions, such as the Task Manager.

1. On the menu bar in MR8, click **Production > Repository**.
2. In the Search Criteria pane, enter search filters as needed, then click **Search** (or press **Alt + S**).



3. MR8 lists all of the files that meet the specified search condition(s).

	Level	Order No.	Part No.	File Type	File Name	Description	Case Name
▶	Case	5002		Waiver Response	Waiver-Pettit.pdf	James Pettit	Lee vs. Merck
	Case	5002		Waiver Response	Waiver-Rice.pdf	Holly Rice	Lee vs. Merck

4. Right-click the file you want to view, then choose:
 - **View** – To see details about the file and the file itself (by clicking the up arrow (launch application) button next to **File Name**). You can also download the file by clicking the down arrow button.



- **View File** – To view the file without going into the file’s detail window.
- **Download Files** – To save the file to your desktop.
- **Bulk Update** – To change the File Type or Publish status without viewing the file.



NOTE

Files are typically uploaded to the central repository through functions such as Case Manager, Task Manager and Turn-in. You can also upload files here. See “Repository,” “Uploading files” and “Uploading files in Production” for more details.

Repository

Uploading files in Production

You can upload files to MR8' repositories within the Production module. This can save time if you already know which entity uploaded files should be associated with (for example, you already know the case name or job number the files belong to).

1. On the menu bar in MR8, click **Production > Repository**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Upload window, select which repository to upload files to in the **Repository Level** drop-down.
4. If you selected:
 - **Case** – Click the binoculars button next to the **Case Name** field. In the Lookup Case window, search for and select the desired case.
 - **Part** – Enter the order number in **Order No.** and the part number in **Part No.**
 - **Item** – Enter the order number in **Order No.** and the part number in **Part No.**, then click the binoculars button next to the **Received Item** drop-down. If there was more than one item, select the appropriate one in the drop-down.
 - **Invoice** – Enter the invoice number in **Invoice No.**
 - **Firm** – Click the binoculars button next to the **Firm** field. In the Lookup Firm window, search for and select the desired firm.
 - **Contact** – Click the binoculars button next to the **Contact** field. In the Lookup Contact window, search for and select the desired contact.
 - **Location** – Click the binoculars button next to the **Location** field. In the Lookup Location window, search for and select the desired location.
5. To select files, click:
 - **Select Files** – to upload files one at a time.
 - **Select Folder** – to upload a folder of files.
6. Locate and select the file/ folder you want to upload. Then click **Open** or **OK**.
7. In the New Upload window, enter the following:
 - **File Type** – Select the file type in the drop-down.
 - **Publish** – Check this box to make this file available to clients, resources or other authorized users through MR Web.
 - **Description** – Enter any text describing this file. If published, the description appears on your MR Web, and clients can search for files using key words.
8. If you have any additional files, repeat steps 5–7.
9. When you have finished adding files, click **Save and Close**. MR8 uploads the file(s) to the selected repository.

Production

Tools for tracking productivity

MR8 provides several preset reports designed to give you quick and easy means to analyze turn-in activities.

Log Analysis

View how many notes by note type were made today or for a specific date range, broken down by who entered the associated part or by order number. MR8 displays the note amounts in a grid that can be printed or exported as HTML or an *Excel* spreadsheet.

Productivity Analysis

View which tracking steps for individual items were completed on time or are overdue. MR8 displays the items and tracking steps in a grid that can be printed or exported as HTML or an *Excel* spreadsheet.

Daily Task Summary

View which tasks were completed today or for a specific date range, broken down by tracking item or tracking step. MR8 lists all of the tasks that meet the specified search condition(s) as a report.

Chapter 6: Billing

In Billing, you finalize and send invoices to clients, plus manage COD and other invoices.

Functions covered in this chapter:

Turn-in

Billing

Reprint Posted Invoices

COD Invoices

Transfer Invoice

Electronic Billing



Billing

The second part of creating an invoice is to select a rate table for each order, then calculate and print its invoice(s). It's a good idea to verify the billing amount for each service item entered in Production Turn-in, and add additional service items, if necessary.

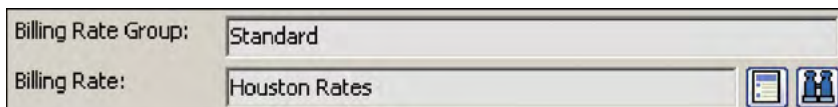
Turn-in

Selecting billing rate tables

In MR8, you can specify a different billing rate table for each order. Each contact belongs to a billing rate group with linked billing rate tables, so only those rate tables appear when billing an order to that contact. You do not have to search through all of your rate tables to find the correct one for a particular order. (See "Billing Rate Groups.")

Billing rate tables are selected when work orders are created. However, you can override them any time before invoices are calculated.

1. On the menu bar in MR8, click **Production > Turn-in** (or press **Ctrl + T**).
2. In the Search Criteria pane, enter the order number, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the work orders that belong to the specified case.
4. Double-click the work order (part) you want to update.
5. In Step 3. Add orders of the Turn-in window, double-click an order for which you want to change the billing rate table.
6. In the Order – [contact name] window, click the binoculars button next to **Billing Rate**.



Billing Rate Group:	Standard
Billing Rate:	Houston Rates

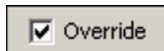
7. In the Lookup Billing Rate window, all of the billing rate tables for the selected billing rate group appear. Double-click a rate table to select it.
8. Click **Save and Close**.

Turn-in

Overriding rates

When you need to bill using a different rate from a selected table's normal rates, use MR8's override feature. Only the current item is changed, and the rate table is unaffected.

1. In Step 3. Add orders of the Turn-in window, click an order to select it. All of the services items entered for the selected order appear in Step 4. Add, copy or prefill services.
2. In Step 4. Add, copy or prefill services, double-click the service item you want to override rates for.
3. In the Service – [service item name] window, check the **Override** box and enter a new rate.



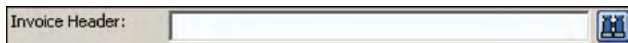
4. Click **Save and Close**.

Turn-in

Selecting invoice headers

MR8 automatically generates a plain invoice header for each item using the patient's name and record type. If the default header is not appropriate or descriptive enough for a particular item, select one of your custom invoice headers (see "Setting up invoice headers").

1. In Step 3. Add orders, double-click the order you want to select an invoice header for.
2. In the Order – [contact name] window, click the binoculars button next to the **Invoice Header** field.

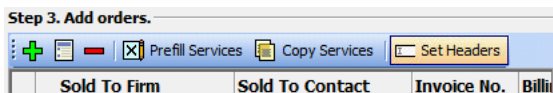


3. In the Lookup Invoice Header window, double-click a header to select it.
4. Click **Save and Close**.



TIP

Specifying an invoice header for every single order can be a time-consuming and tedious chore when you have many parties ordering. Use the Set Headers function to speed up this task. In the third quadrant, click **Set Headers**. You can either enter a custom header or click the binoculars button to select a header from your previously set headers. In the Orders section, select whom you want to receive the new header, then click **Save and Close**.

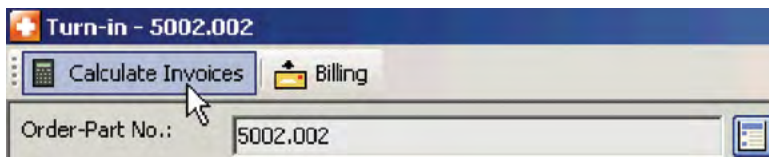


Turn-in

Getting invoices ready to print

You must calculate invoices before you can print or email them. Before clicking the Calculate Invoices button, you can add invoice messages or enter additional information.

1. In Step 2. Prefill parties of the Turn-in window, double-click the invoice (contact) you want to view and edit.
2. In the Party – [contact name] window, enter the following information:
 - **Invoice Date** – The default is today’s date. To backdate the invoice, enter a new date.
 - **Invoice Type** – Select an invoice type (e.g., Interoffice Invoice or Vendor Invoice) in the drop-down.
 - **Reference No.** – If another records retrieval firm has actually done the work and sent you an invoice, you can enter that invoice number here for reference.
 - **Invoice Message** – Defaults to your Invoice Message setting. Override by entering the text you want or click the binoculars button to select a different invoice message in the Lookup Invoice Message window. From there, you can also create additional messages for re-use and change the default message. See “Setting up Invoice Messages.” You can also select an invoice message from the list, then add your own text to it.
3. Click **Save and Close**.
4. If you want to change the order in which service items appear on an invoice, click the party’s name in Step 3, then click a service item in Step 4 and click **Move Up** or **Move Down** to change its place in the list.
5. Click **Calculate Invoices**.



6. In the Calculate Invoices window, all of the invoices that have a Bill To firm indicated are selected automatically. If any invoice is not ready to be calculated, check its **Select** box to de-select it.



7. Click **Calculate**. The window closes automatically after the calculation is done.
8. Click **Billing**.
9. MR8 launches the Billing function and lists the invoices for the selected work order. You can print, fax, email or archive invoices from here. (See “Posting and sending invoices.”)

**TIP**

Specifying an invoice message for every single invoice can be a time-consuming and tedious chore when you have many parties ordering. Use the Set Messages function to speed up this task. In the second quadrant, click **Set Messages**. You can either enter a custom message or click the binoculars button to select one from your previously set messages. In the Parties section, select whom you want to receive the new message, then click **Save and Close**.

Billing

Previewing invoices

You can preview invoices one at a time before posting, printing, faxing, emailing or saving them as PDFs to MR8's repository.

1. Right-click the invoice you want to preview, then choose **Preview Invoice**.
2. From the Preview Invoice – [invoice number] window, you can:
 - **Turn detail on/Turn detail off** – Click these buttons to show or hide service item descriptions on the invoice.
 - **Post Invoice** – Click to post (finalize) the invoice from the preview window.
 - **Send Invoice > Email/Fax/Repository Server** – Select to send a copy of the invoice.
 - **Print** – Click the printer button to print a hard copy.
 - **Export** – Click the envelope button, then select a format and destination to create a file on your desktop or elsewhere. See “Exporting reports.”



BEST PRACTICES

All invoices are temporary until they are posted. Invoices that are not posted (i.e., not finalized) are printed with the word, “DRAFT,” on them. This is to prevent invoices not posted from being sent out accidentally to clients.



NOTE

If you post an invoice from the Preview Invoice window, but don't print or send it, you can use the Reprint Posted Invoices function to print it later. (See “Printing copies of posted invoices.”)

Billing

Posting and sending invoices

After calculating invoices, you can post (finalize) and send them via print, fax or email in one action. Once posted, an invoice cannot be deleted.

If you know the order number, access Billing directly and enter the order number. Otherwise, you can launch the Billing function for a particular order from the Turn-in window. (See “Getting invoices ready to print.”)

1. To access the Billing function, either:
 - Click **Billing** in the Turn-in - [job number] window. See “Getting invoices ready to print.”
 - Click **Billing > Billing** on the menu bar in MR8 (or press **Ctrl + B**). Then in the Search Criteria pane, enter the order number, and click **Search** (or press **Alt + S**).
2. All of the invoices for the selected order appear. Depending on the **Communication Type** setting in each contact, MR8 defaults to send each invoice in one of three ways:
 - **By email.** Email invoices are sent to the **Billing Email** address(es) listed on the contact's **Additional** tab. See “Setting up contacts.”
 - **By fax.**
 - **By printout** for manual faxing or mailing. Invoices print with the **Billing Address** specified on the **Additional** tab in a firm's set-up. See “Setting up firms.”

- To store the invoices (in PDF format) in the central repository:
 - **For individual invoices**, check their **Archive** boxes one at a time.
 - **For all invoices listed**, click **Actions > Check All > Archive**.

	Print	Fax	Email	Archive	Invoice No.	Invoice Date	Invoice Amount	Original	COD	Recalc
▶	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5045	11/26/2007	125.86	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5046	11/26/2007	60.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	5047	11/26/2007	60.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Highlight all of the invoices. Click **Actions** (or right-click on the grid), then click **Post & Send Invoices**. In the pop-up window that appears, click **Yes**. MR8 posts (finalizes) the selected invoices, removes them from the Billing function, and sends each invoice by the method specified for that contact.

**TIP**

Clicking one invoice, then **Shift**-clicking another invoice selects all of the invoices in between. Use **Ctrl**-click to select non-contiguous invoices.

**NOTE**

If any invoice displays the invoice amount in red and has its **Recalc** checkbox flagged, you must recalculate the invoice before posting it. (See “Recalculating invoices.”)

COD invoices cannot be posted or archived to the central repository. See “Working with COD invoices.”

Billing

Viewing invoice details

MR8 stores more information for each invoice than what normally appears on a printed invoice. You can view these details directly from the Billing screen and edit certain fields without going back to Turn-in.

- In the Billing window, right-click the invoice you want to view, then choose **View**.
- In the Invoice – [invoice number] window, you can edit the following fields:
 - **Invoice Date** – If you want to backdate the invoice, enter a new date.
 - **Original** – Check this box if the party is paying for the original.
 - **Invoice Type** – Select an invoice type (e.g., Interoffice Invoice or Affiliate invoice) in the drop-down.
 - **COD** – Defaults to the firm’s C.O.D. setting. Change the setting for this invoice only by checking this box.
 - **Reference No.** – If another court reporting firm has actually done the work and sent you an invoice, you can enter that invoice number here for reference.
 - **Invoice Message** – Defaults to your Invoice Message setting. Override by entering the text you want or click the binoculars button to select a different invoice message in the Lookup Invoice Message window. From there, you can also create additional messages for re-use and change the default message. See “Setting up Invoice Messages.”
 - **Remarks** – Enter any notes about this invoice in this text box on the **Additional** tab.
- If desired, you can also upload and view invoices and other related files on the **Invoice-level Repository** tab. (See “Uploading files” and “Viewing files.”)

Billing

Recalculating invoices

Whenever you modify any data fields that affect the invoice amount, MR8 turns the recalculation flag on indicating that the user must calculate the invoice again. The flag turns off when the calculation is performed. If you see any invoice with the Recalc column checked, you must calculate the invoice again.

1. In the Billing window, any invoices that need recalculating appear in red and the **Recalc** box is checked. Right-click the invoice you need to recalculate, then choose **Calculate Invoice**.

Invoice Amount	Original	COD	Recalc
381.30	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
490.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
410.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

2. The selected invoice is recalculated, and the new invoice amount appears. Also the **Recalc** checkbox is cleared and the text turns black. You can now post and send the invoice. See “Posting and sending invoices.”

Billing

Posting invoices

Typically, you post invoices as you print using the Post & Send Invoices command. (See “Posting and sending invoices.”) However, you can post invoices separately, then print them later using the Reprint Posted Invoices function. (See “Printing copies of posted invoices.”)

1. In the Billing window, highlight all of the invoices you want to post.
2. Click **Actions** (or right-click on the grid), then click **Post Invoices**.
3. In the pop-up window that appears, click **Yes**. MR8 audits and posts selected invoices. Once posted, these invoices are removed from the grid.

Reprint Posted Invoices

Sending copies of posted invoices

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

1. On the menu bar in MR8, click **Billing > Reprint Posted Invoices**.
2. In the Search Criteria pane, enter search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the invoices that meet the specified search condition(s). Depending on the **Billing Communication Type** setting in each contact, MR8 defaults to send each invoice in one of three ways:
 - **By email.** Email invoices are sent to the **Billing Email** address(es) listed on the contact’s **Additional** tab. See “Setting up contacts.”

- **By fax.**
 - **By printout** for manual faxing or mailing. Invoices print with the **Billing Address** specified on the **Additional** tab in a firm's set-up. See "Setting up firms."
4. Right-click the invoice you want to reprint, then choose **Preview Invoice**. Select one of the following options:
 - **Current Invoice** – To print the invoice showing the current balance along with credits, payments and finance charges.
 - **Original Invoice** – To print an exact replica of the original invoice.
 5. The first invoice appears in the Preview window, and MR8 exports it according to its billing communication type. If there are additional invoices in the Reprint Posted Invoices window, MR8 repeats the process until it has sent all of the listed invoices and closes the Preview window.



TIP

After an invoice is posted, it is removed from the main Billing function. Reprint Posted Invoices is where you can search for and view previously posted invoices. After finding the invoice you want to view in Reprint Posted Invoices, right-click it and choose **Preview Invoice**.

COD Invoices

Working with COD invoices

MR8 does not regard COD (Cash on Delivery) invoices as sales, therefore they cannot be posted. 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.

Whenever you do receive a payment for a COD invoice, remove the COD flag, post the invoice, and apply the payment.

1. On the menu bar in MR8, click **Billing > COD Invoices**.
2. In the Search Criteria pane, enter the invoice number for which you received a check, then click **Search** (or press **Alt + S**).
3. Double-click the invoice.
4. In the Invoice – [invoice number] window, uncheck the **COD** box.
5. Click **Save and Close**.
6. Right-click the invoice, then choose **Post Invoice**.



NOTE

If the invoice has incurred finance charges or late fees since you created it, the invoice will need to be recalculated. In that case, open the invoice in the Billing module, recalculate it, then post it. See "Recalculating invoices."

COD 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. On the menu bar in MR8, click **Billing > COD Invoices**.
2. In the Search Criteria pane, enter an invoice date range, then click **Search** (or press **Alt + S**).
3. Select all of the invoices by **Shift**-clicking the last row.

	Invoice No.	Invoice Date	Invoice Amount	COD	Sent Date
	1045	11/17/2005	953.79	<input checked="" type="checkbox"/>	
▶	5517	1/9/2006	995.50	<input checked="" type="checkbox"/>	

4. Click **Actions** (or right-click on the grid), then choose **Delete**.

Transfer Invoice

Transferring invoices

It is a common mistake to send an invoice to a wrong party. Instead of voiding and rebilling, transfer the invoice from one party to another. You can even change the ordering party.

1. On the menu bar in MR8, click **Billing > Transfer Invoice**.
2. In the Search Criteria pane, enter search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the invoices that meet the specified search condition(s).
4. Double-click the invoice you want to transfer.
5. In the Transfer Invoice – [invoice number] window, you can change either one or both:
 - **Sold To Contact** – Click the binoculars button to change the ordering party.
 - **Bill To Contact** – Click the binoculars button to change the billing party.

The screenshot shows a window titled "Transfer Invoice" with four rows of input fields. Each row has a label on the left, a text box in the middle, and a binoculars icon on the right. The first row is "Sold To Firm:" with "Baker Botts LLP". The second row is "Sold To Contact:" with "Dennis Baker". The third row is "Bill To Firm:" with "Baker Botts LLP". The fourth row is "Bill To Contact:" with "Dennis Baker".

6. Click **Save and Close**.

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. Traditionally, invoices have been submitted to customers in paper format. By processing electronic bills, corporations recoup savings in paper handling and processing costs.

Export Invoices

What is LEDES?

MR8 users can now export invoices 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. 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.

Over the years, many file formats were developed. However, LEDES 1998B is the only format MR8 supports at this time. 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.

Export Invoices

What is UTBMS?

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 three 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.


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. The best way is to start with the Service Items Master List, then “mass update” the billing rate tables. If your client has not provided the codes, you can obtain them at www.utbms.com. (See the appendix for the standard litigation code set adopted by ABA.)

1. On the menu bar in MR8, click **Setup > Service Items Master**.
2. Click **Search** to list all the service items.
3. Double-click a service item.
4. In the LEDES 1998B section, enter the following information:
 - **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.

LEDES 1998B			
Exp/Fee Type:	<input type="text" value="Expense"/>	Task Code:	<input type="text"/>
Expense Code:	<input type="text" value="E115"/>	Activity Code:	<input type="text"/>

5. Click **Save**.
6. Click **Mass Update**, then choose **Billing Rates**.

 Mass Update ▾
7. Check four boxes– **Exp/Fee Type, Task Code, Expense Code** and **Activity Code**.
8. In the Billing Rates section, check the **Update** box to select a billing rate table. To select all of the billing rate tables at once, click **Check All**.
9. Click **Save and Close**.
10. Repeat steps 3 through 9 until you have updated all of the service items.

**NOTE**

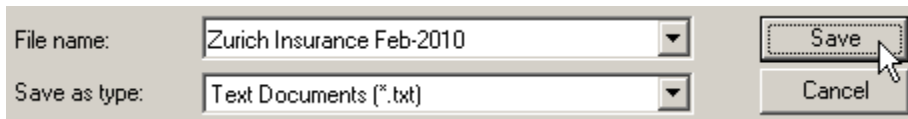
Even though it might be rare, it is possible for an insurance company to require different codes than the standard. In that case, simply update the billing rate tables belonging to the insurance company without modifying the service items master list.

Export Invoices

Exporting invoices in LEDES format

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

1. On the menu bar in MR8, click **Billing > Export Invoices**.
2. In the Search Criteria pane, select the **Bill To Firm (required)** and other parameters.
3. Click **Search** (or press **Alt + S**). MR8 lists all of the invoices that meet the specified search condition(s).
4. Right-click on the grid, then choose **Check All**.
5. Right-click on the grid, then choose **Export LEDES 1998B**.
6. In the Save As window, type a file name in the **File Name** field, then click **Save**.



IMPORTANT

Client ID is a required field for the LEDES 1998B format. Make sure that you enter this number for each contact in the **Case Party > Billing Info** tab. (See “Entering parties.”)

Export Invoices

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, and payment will shortly follow.

You can validate the exported files easily using validation online services or desktop applications.

ABA Litigation Code Set

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

Chapter 7: Data Inquiry

Use Data Inquiry functions to locate information in MR8's database, such as the list of invoices from a case or the list of checks from a client. Plus analyze different aspects of your business, such as a client's invoice history. Print or export the results as an *Excel* spreadsheet.

Functions covered in this chapter:

Invoice Inquiry

Client Activity

Client Analysis

Payment Inquiry

Marketing Inquiry

Anniversary Inquiry





Invoice Inquiry

Searching for invoices

Search for posted invoices by invoice number or date, order number or date, case, claim number, client matter number or invoice amount. Then get detailed information, including payment history, about the invoices.

1. On the menu bar in MR8, click **Inquiry > Invoice Inquiry** (or press **Ctrl + I**).
2. In the Search Criteria pane, enter search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the invoices that meet the specified search condition(s). Double-click an invoice to see more details.
4. In the Invoice – [invoice number] window, six tabs—**General, Additional, Items, Payment Transactions, Invoice-level Repository** and **History Log**—appear. Click a tab to display its related information.

Client Activity

Viewing client activity

Search for a specific client's invoices. Use filters to focus your search. For example, search 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.

1. On the menu bar in MR8, click **Inquiry > Client Activity**.
2. In the Search Criteria pane, select the firm and other parameters. In the **Party Type** drop-down, choose either:
 - **Sold To** – To view invoices for a client who ordered services.
 - **Bill To** – To view invoices billed to a third party (such as an insurance company).
 - **Sold To Parent Firm** – To view invoices for all of the branches of a multi-office firm which ordered services. (See “Setting up firms.”)
 - **Bill To Parent Firm** – To view invoices billed to a multi-office third party (such as an insurance company).
3. Click **Search** (or press **Alt + S**). MR8 lists all of the invoices that meet the specified search condition(s). Double-click an invoice to see more details.
4. In the Invoice – [invoice number] window, six tabs—**General, Additional, Items, Payment Transactions, Invoice-level Repository** and **History Log**—appear. Click a tab to display its related information.



TIP

Select an option in the **Account Status** drop-down to limit the selection to open (unpaid) invoices or paid invoices.



Client Analysis

Summarizing client activity

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

1. On the menu bar in MR8, click **Inquiry > Client Analysis**.
2. In the Search Criteria pane, in the **Party Type** drop-down, choose either:
 - **Sold To** – To view totals for a client who ordered services.
 - **Bill To** – To view totals billed to a third party (such as an insurance company).
 - **Sold To Parent Firm** – To view totals for all of the branches of a multi-office firm which ordered services. (See “Setting up firms.”)
 - **Bill To Parent Firm** – To view totals billed to a multi-office third party (such as an insurance company).
3. Select the firm in the **Firm/Parent Firm** lookup field (required). Set other search criteria as desired.
4. Click **Search** (or press **Alt + S**).
5. MR8 summarizes all of the invoices that meet the specified search condition(s).

90 Facts		Year		Quarter			
		2007					
		3		4		Totals	
>> Group	Subgroup	Amount	Units	Amount	Units	Amount	Units
+ 1.	Original	12.42	23.00	152.35	277.00	164.77	300.00
+ 2.	Copy	25.30	46.00	160.60	292.00	185.90	338.00
+ 3.	Custodian Fee	27.50	1.00			27.50	1.00
- 9.	Misc. Charge						
	+ Delivery	52.50	2.00	67.50	9.00	120.00	11.00
	+ Other	83.00	2.00	581.00	14.00	664.00	16.00
	+ Pass-Thru	9.00	3.00			9.00	3.00
	+ Production	2.00	2.00	15.00	24.00	17.00	26.00
	Totals	146.50	9.00	663.50	47.00	810.00	56.00
Totals		211.72	79.00	976.45	616.00	1,188.17	695.00

**TIPS**

You can click any plus (+) sign to expand the level, displaying its subcategories underneath. For example, click the “+” next to the year to show the quarters. Then you can compare the revenue from quarter to quarter.

Hide columns by clicking **90 Facts** and unchecking the boxes next to the names of columns you want to hide.

If you want to save the report as a file, click **Actions > Export**. Then choose either HTML or Excel.

Payment Inquiry

Searching for payment histories

Search for payment history by check number, check date, invoice number, firm or payer. Payment history includes payments, credit/debit memos, voids, write-offs, duplicate payments and refunds for each invoice.

1. On the menu bar in MR8, click **Inquiry > Payment Inquiry**.
2. In the Search Criteria pane, enter search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the checks that meet the specified search condition(s). Double-click a check to see more details.
4. In the Payment Detail window, all invoices paid by this check appear.

	Invoice No.	Invoice Date	Invoice Amou...	Balance	Credit	Discount	Overpaym...
▶	1003	8/21/2005	36.45	0.00	36.45	0.00	0.00
	1026	9/16/2005	43.60	0.00	43.60	0.00	0.00

Marketing

You are in the business of marketing

No matter what business you say you are in, you are also in the business of marketing. Marketing is about attracting clients, getting them to use your services, and then making sure they are happy with your service so they come back again. In fact, you might say that you are in the business of marketing first, because you don't have a business if you don't have clients.

As a company leader, you need to include marketing in your business focus. And while we can't provide a "one size fits all" marketing strategy because every firm is unique, MR8 does offer some tools to help you implement your own marketing strategy.

Order Analysis

Know who is calling

You can easily see who your best clients are by looking at the number of calls 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 cases they didn't initiate.

1. In **Orders > Order Analysis**, the order date range defaults to today. Change the search filters as needed, then click **Search**.
2. MR8 counts new and cancelled orders by firm, broken down by attorney, so you can see how many orders you are getting from each client.

**TIP**

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

Sort By:

Number of Net ▼

Marketing Inquiry

Knowing your market

Use Marketing Inquiry to create reports on your client base and resource use. Quickly find out who are your top firms and/or contacts in terms of jobs scheduled and revenue generated. Or see which resources are your busiest and which haven't worked for you in a while. You can also generate contact lists to print envelopes or labels within MR8 for your targeted marketing efforts.

1. In **Inquiry > Marketing Inquiry**, select a qualifier in the **Type** drop-down.
2. In **Date From/To**, enter the period you want to analyze. (The type of date varies depending on the type selected in step 1.)
3. If applicable, enter a number in **Top N**.
4. To see results for specific business units, deselect **ALL** in the **Business Units** drop-down, then check the desired business unit(s)/
5. Click **Search**. RB8 returns a list based on the search criteria. If you searched for contacts or resources, their contact information is displayed in the grid.
6. To produce a report, click **Actions** (or right-click on the grid), then:
 - **Print Preview** – To print a hard copy of the results.
 - **Export** – To create an *Excel* file of the results.
7. To prepare envelopes or labels, highlight the contacts in the grid you want to contact, then click **Actions > Envelopes and Labels** to open the Envelopes and Labels function with the selected addresses. See “Printing envelopes and shipping labels.”



TIP

You can use Marketing Inquiry to find and contact former clients to see if you can win them back. See “Knowing who has stopped calling.”

Marketing Inquiry

Know who has stopped calling

How many clients does your firm lose every year? With churn increasing and customer loyalty fading, winning back and keeping lost clients has never been more critical. According to a marketing study, your chances of winning back a former client are statistically two to four times higher than landing a new one.

Clients defect for different reasons, and some clients, frankly, aren't worth winning back. Careful evaluation and categorization let you select the most valuable clients to target, then develop individualized strategies to win back each type of client. Use MR8 to generate your list of lost clients, so you can target your marketing to them.

1. In **Inquiry > Marketing Inquiry**, select No Order Contacts in the **Type** drop-down.
2. In **Part Order Date From/To**, enter the period you want to analyze.
3. Click **Search**. MR8 lists contacts who called at least once during the previous period but have not called for the specified (current) period.



TIP

Categorize lost clients using the **Rating** or **Misc. Code** field in the **Contacts** table to help you when developing a marketing strategy for winning them back. Here are some suggestions:

- Lost – Intentionally pushed away
- Lost – Unintentionally pushed away
- Lost – Pulled away
- Lost – Bought away
- Lost – Moved away
- Lost – Variety seeker

Anniversary Inquiry

Keeping track of important client dates

In MR8, you can enter any event you want to remember for contacts, such as birthdays or wedding anniversaries. (See “Remembering important client dates.”) The system will automatically remind you when an important event is within a set number of days. In addition, you can pull up a list of upcoming anniversaries so that you can generate labels for cards.

1. On the menu bar in MR8, click **Inquiry > Anniversary Inquiry**.
2. In the Search Criteria pane, specify any of the following filters:
 - **Anniversary Type** – Select anniversary type(s) in the drop-down. The default is ALL.
 - **Anniversary Date From/To** – Enter an anniversary date range.
 - **Client Of** – Click the binoculars button to select a particular client rep.
 - **Sales Rep** – Click the binoculars button to select a particular sales rep.
 - **Firm** – Click the binoculars button to select a particular client firm.
 - **Send To** – Select either Firm Address or Home Address in the drop-down.
3. Click **Search**. MR8 lists all of the contacts who meet the specified search condition(s).
4. Right-click on the grid, then choose **Envelopes and Labels** to generate DYMO labels for cards.



TIP

If you want to generate a different kind of mailing labels (e.g., laser labels), do the following:

1. Right-click on the grid, then choose **Export > Excel**.
2. In *Microsoft Excel*, save and close the workbook that contains the data.
3. Switch to *Microsoft Word*.
4. On the **Tools** menu in *Word*, click **Letters and Mailings > Mail Merge Wizard**.

For more information about these steps, see *Word* Help.

Chapter 8: Receivables

Credit and track receivables in MR8; plus assess finance charges, print monthly reports and monitor collection efforts.

Functions covered in this chapter:

Payments

Other Transactions

Credit Memos

Debit Memos

Duplicate Payments

Misc. Receipts

Refunds

Void Invoice

Write Off Invoice

Daily Registers

Daily Balance Log

Generate Finance Charges

Clear Finance Charges

Finance Charges Report

Monthly Journals

Statements

Aged A/R

Client Account Activity

Paid Invoices Report

Voided Invoices Report

Summary Invoice

Collection Manager

Collection Follow-up


Collection Forecast



Payments

Entering simple payments (one check per invoice)

MR8 now provides a quick and easy way to enter *simple payments* (i.e., one check paying for one invoice). Before you begin, segregate the simple payment checks from the checks paying for multiple invoices, so that you can process all of the simple payments in one sitting without switching windows back and forth.

1. On the menu bar in MR8, click **Receivables > Transactions > Payments** (or press **Ctrl + P**).
 2. Click **New (at the top grid)**.
 3. In the New Payment window, **Check Type** defaults to One Check One Invoice, **Payment Type** defaults to Check, **Transaction Date** defaults to today, **Account No.** defaults to the Checking account, and the focus (cursor) is in the **Invoice No.** field.
 4. Enter the invoice number, then press the **Enter** key. MR8 automatically fills in the following fields with default values:
 - **Payer** – The firm that was sent the invoice (Bill To).
 - **Check Amount** – The current balance of the invoice.
 - **Invoice Amount** – The current balance of the invoice.
 - **Balance** – The current balance of the invoice.
 - **Credit** – The current balance of the invoice.
 5. Make any changes if necessary, then enter the following information:
 - **Check No.** – Enter the check number.
 - **Check Date** – Enter the actual date on the check.
 - **Made By** – Enter the issuer of the check if different from the Bill To firm.
 6. Press **Ctrl + N** (or click **Save and New**).
- 
7. Repeat steps 4 through 6 to enter the rest of the simple payment checks.



TIP

The simple payment window is designed so that you can use it without a mouse. Use the **Tab** key to move forward from field to field. To move backward, use **Shift + Tab**.

Payments

Entering payments that cover multiple invoices

If a payment covers several invoices, use the One Check Multiple Invoices option to process the payment. MR8 can handle an unlimited number of invoices paid by one check.

1. On the menu bar in MR8, click **Receivables > Transactions > Payments** (or press **Ctrl + P**).
2. Click **New (at the top grid)**.
3. In the New Payment window, select One Check Multiple Invoices in the **Check Type** drop-down.
4. Enter the following information:
 - **Payer** – If the check is from a third party, leave this field blank. Type the name of the third party in the **Made By** field. Otherwise, click the binoculars button to select the firm (Bill To).
 - **Payment Type** – Select a payment type in the drop-down. The default is Check.
 - **Transaction Date** – Enter the payment date. The default is today’s date.
 - **Check Amount** – Enter the entire check amount.
 - **Check No.** – Enter the check number.
 - **Check Date** – Enter 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 the Checking account.
 - **Made By** – Enter the issuer of the check if different from the Bill To firm.
5. Press **Ctrl + O** (or click **Save and Close**).
6. In the Payment Detail window that follows, the check amount appears as the initial **Unapplied Amount** (highlighted in red). All open invoices for the selected firm (payer) are listed in the grid. If you left the **Payer** field blank, no invoices will be listed (see the Tip below).
7. Click the invoice that is being paid.
8. In the **Credit** field, enter the credit amount. The default amount shown is either the current balance of the invoice or the current unapplied amount, whichever is less.
9. In the **Discount** field, enter the discount amount, if applicable. (See “Applying discounts.”)
10. In the **Overpayment** field, enter the overpayment amount, if applicable. (See “Applying overpayments.”)
11. In the **Late Charge** field, enter any late charge amount being paid.
12. In the **Finance Charge** field, enter any finance charge amount being paid.
13. Click **Apply (or press Alt + Y)**.
14. Repeat steps 7 through 13 to add all of the invoices being paid by this check. When **Unapplied Amount** (highlighted in red) reaches zero, the Payment Detail window closes automatically.



TIP

If no invoices are listed in the Payment Detail screen because you have not selected the Payer in the previous window, use **Invoice No.** or **Invoice Amount From/To** to find the invoice.

A screenshot of a software interface titled "Payment Detail". Below the title is a "Search Criteria" section. It contains several input fields: "Bill To Firm:" with a text box and a small icon; "Bill To Contact:" with a dropdown menu; "Invoice No.:" with a text box containing "63125"; "Invoice Amount From:" with a text box containing "0.00"; and "Invoice Amount To:" with a text box containing "0.00".

NOTE

For an explanation of credits and debits and other basic accounting concepts, see “Appendix A | Accounting basics.”

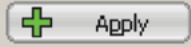
Payments

Applying discounts

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, use the Discount field in the Payment Detail window to make the balance go down to zero.

1. Follow steps 1 through 7 in “Entering payments that cover multiple invoices.”
2. In the **Discount** field, enter the difference between the invoice total and the check total, and click **Apply**. (For example, if a client sent a check for \$347.00 for an invoice that had a balance of \$347.75, enter \$0.75.)

Check Amount:	<input type="text" value="347.00"/>	Unapplied Amount:	<input type="text" value="347.00"/>
Invoice No.:	<input type="text" value="5618"/>	Credit:	<input type="text" value="347.00"/>
Discount:	<input type="text" value="0.75"/>	Overpayment:	<input type="text" value="0.00"/>
Late Charge:	<input type="text" value="0.00"/>	Finance Charge:	<input type="text" value="0.00"/>



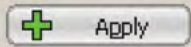
Payments

Applying overpayments

If a client sends you a check for more than is owed, the excess amount in the Payment Detail window after you have applied the payment to invoices should be entered as an overpayment. MR8 posts all overpayments to the Refund account since they are liabilities to be refunded in the future.

1. Follow steps 1 through 7 in “Entering payments that cover multiple invoices.”
2. In the **Overpayment** field, enter the difference between the invoice total and the check total, and click **Apply**. (For example, if a client sent a check for \$695.00 for an invoice that had a balance of \$685.00, enter \$10.00.)

Check Amount:	<input type="text" value="695.00"/>	Unapplied Amount:	<input type="text" value="695.00"/>
Invoice No.:	<input type="text" value="5506"/>	Credit:	<input type="text" value="685.00"/>
Discount:	<input type="text" value="0.00"/>	Overpayment:	<input type="text" value="10.00"/>
Late Charge:	<input type="text" value="0.00"/>	Finance Charge:	<input type="text" value="0.00"/>





NOTE

If you receive a check for an invoice that has already been paid, use the Other Transactions function to record the payment as a duplicate payment. (See “Entering duplicate payments.”)

Firms

Handling retainers (upfront deposits)

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.

A retainer is a liability on your books even though you deposit the funds into your checking account. As such, MR8 posts it as a liability to the Client Retainers account. (For a definition of liability, see “Appendix A | Accounting basics.”)

1. On the menu bar in MR8, click **Setup > Firms** (or press **Ctrl + F**).
2. In the Search Criteria pane, search for the firm that is paying a retainer. Double-click the firm to bring up its detail window.
3. Click the **Collection Info** tab, then click the bulleted list (properties) button next to the **Retainer Amount** field.

The screenshot shows a software window for a firm named "Berg Steiner Chapman LLP". The "Collection Info" tab is selected. The "Collector" field contains "Alicia Smith". The "Retainer Amount" field shows "0.00" and has a small icon to its right. Other tabs visible are "General", "Additional", and "Marketing".

4. In the Retainer – [firm name] window, click **New**.
5. In the New Retainer window, enter the following information:
 - **Date** – Enter the payment date. The default is today’s date.
 - **Amount** – Enter the retainer amount.
 - **Remarks** – Enter the reason for the retainer.
6. Click **Save and Close**.



IMPORTANT

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.”)

Payments

Applying retainers to multiple invoices

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.")

1. On the menu bar in RB8, click **Receivables > Transactions > Payments** (or press **Ctrl + P**).
2. Click **New** (at the top grid).
3. In the New Payment window, select One Check for Multiple Invoices in the **Check Type** drop-down.
4. Click the binoculars button next to **Payer** to select the Bill To firm.
5. Select Retainer in the **Payment Type** drop-down.
6. The **Retainer Amount** field appears with the current balance of the client's retainer. In the **Check Amount** field, enter the amount of the retainer you plan to use now (up to its current balance).
7. Click **Save and Close**.
8. In the Payment Detail window that follows, the amount entered in step 6 appears as the initial **Unapplied Amount** (highlighted in red). At the same time, all open invoices for the selected firm are listed in the grid. Highlight an invoice and click **Apply**.
9. The **Unapplied Amount** is reduced by the amount of the applied invoice. Repeat step 8 until you have applied all of the invoices to the retainer.
10. When you have reduced the retainer amount to zero, the Payment Detail window automatically closes. In the Payment window, the payments are listed with a **Payment Type** of Retainer and are ready for posting. See "Closing out transactions."

Payments

Applying retainers to single invoices

If you are applying a retainer to a single invoice, use this method instead.

1. On the menu bar in RB8, click **Receivables > Transactions > Payments** (or press **Ctrl + P**).
2. Click **New** (at the top grid).
3. In the New Payment window, enter the invoice number you are applying the retainer to in **Invoice** and click the binoculars button.
4. RB8 automatically enters the firm name in **Payer** and the invoice amount in **Check Amount**. Select Retainer in the **Payment Type** drop-down.

- The **Retainer Amount** field appears with the current balance of the client’s retainer. Edit any input fields as necessary and click **Save and Close**.
- In the Payment window, the payment is listed along with a **Payment Type** of Retainer. Select the payment and click **Post**. See “Closing out transactions.”

Payments

Correcting payment applications

If you discover after recording a payment, that you should have applied it to a different invoice, or you failed to apply discounts, overpayments, late charges or finance charges, delete the incorrectly applied invoices from the payment and re-apply the payment.

- On the menu bar in MR8, click **Receivables > Transactions > Payments** (or press **Ctrl + P**).
- In the Search Criteria pane, set your search criteria, then press **Enter** (or click **Search**).
- In the Payments window, click the payment you want to correct in the top grid.
- MR8 lists all the invoices paid by the selected payment in the Detail section (the bottom grid).

	Invoice No.	Invoice Amount	Balance	Credit	Discount	Overpayment
- Pmt No.: 1011 (2 Items)						
	5016	21.15	0.00	21.15	0.00	0.00
	5033	15.10	0.00	15.10	0.00	0.00

- Click the invoice you want to delete, then choose **Delete**. In the pop-up dialog box that appears, click **Yes**. Repeat until you remove all invoices that are incorrectly applied from the bottom grid.
- In the Detail section, click **New**.
- In the Payment Detail window that follows, the remaining unapplied amount appears in red.
- Follow steps 6 through 13 in “Entering payments that cover multiple invoices.”



NOTE

Once a payment is recorded, the check amount and the payment type cannot be edited. You must delete the payment first, then re-enter it. To delete a payment, select it, then choose **Delete**.

Other Transactions

Issuing credit memos

A *credit memo* reduces the balance of an invoice. 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. Use the Void Invoice function instead. (See “Voiding invoices.”)

1. On the menu bar in MR8, click **Receivables > Transactions > Other Transactions**.
2. Click **Actions** (or right-click on the grid), then choose **New > Credit Memo**.
3. In the Search Criteria pane, type the invoice number and click **Search** (or press **Enter**).
4. The invoice details appear. Enter the following information:
 - **Account No.** – A credit memo credits the Accounts Receivable account. Select an account to be debited in the drop-down. The default is the Discount Expenses account.
 - **Transaction Amount** – Enter the credit amount. It cannot be greater than the current balance.
 - **Transaction Date** – Enter the credit date. The default is today’s date.
 - **Debit Sales Rep Commission** – Check this box 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.
 - **Description** – Enter the reason for the credit.
5. Click **Save and Close**.

Other Transactions

Issuing debit memos

If a client bounces a check, or you want to reverse a previously issued credit memo, use a debit memo to handle the situation. A *debit memo* increases the balance of an invoice. If the invoice has a full balance, you cannot issue a debit memo.

1. On the menu bar in MR8, click **Receivables > Transactions > Other Transactions**.
2. Click **Actions** (or right-click on the grid), then choose **New > Debit Memo**.
3. In the Search Criteria pane, type the invoice number and click **Search** (or press **Enter**).
4. The invoice details appear. Enter the following information:
 - **Account No.** – A debit memo debits the Accounts Receivable account. Select an account to be credited in the drop-down. The default is the Checking account.
 - **Transaction Amount** – Enter the debit amount. It cannot be greater than the difference between the invoice amount and the current balance.
 - **Transaction Date** – Enter the debit date. The default is today’s date.
 - **Credit Sales Rep Commission** – Check this box 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.
 - **Description** – Enter the reason for the debit. The default is “Returned check.”
5. Click **Save and Close**.

Other Transactions

Entering duplicate payments

If you receive a check for an invoice that has been paid already, and you want to deposit the check (rather than return it); enter it as a duplicate payment in MR8 to record the payment.

A *duplicate payment* is a liability on your books even though you deposit the funds into your checking account. As such, MR8 posts it as a liability to the Refund account.

1. On the menu bar in MR8, click **Receivables > Transactions > Other Transactions**.
2. Click **Actions** (or right-click on the grid), then choose **New > Duplicate Payment**.
3. In the Search Criteria pane, type the invoice number and click **Search** (or press **Enter**).
4. The invoice details appear. Enter the following information:
 - **Account No.** – A duplicate payment debits the Checking account. Select an account to be credited in the drop-down. The default is the Refund account.
 - **Transaction Amount** – Enter the duplicate payment amount. The default is the invoice amount.
 - **Transaction Date** – Enter the payment date. The default is today’s date.
 - **Check No.** – Enter the check number.
 - **Check Date** – Enter the actual date on the check.
 - **Description** – The default is “Duplicate payment by.” Fill in the rest by entering the issuer of the check and other comments.
5. Click **Save and Close**.



NOTE

If you issue a refund check for a duplicate payment, be sure to note the refund in MR8, so your Payment Transactions log is accurate. (See “Recording refunds made.”)

Other Transactions

Entering miscellaneous receipts

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.

1. On the menu bar in MR8, click **Receivables > Transactions > Other Transactions**.
2. Click **Actions** (or right-click on the grid), then choose **New > Misc. Receipt**.
3. In the New Misc. Receipt window, enter the following information:
 - **Account No.** – A miscellaneous receipt debits the Checking account. Select an account to be credited in the drop-down.
 - **Transaction Amount** – Enter the miscellaneous receipt amount.
 - **Transaction Date** – Enter the receipt date. The default is today's date.
 - **Check No.** – Enter the check number.
 - **Check Date** – Enter the actual date on the check.
 - **Order No.** – Enter a job number, if applicable.
 - **Business Unit** – Select a business unit in the drop-down.
 - **Description** – Enter the reason for the receipt.
4. Click **Save and Close**.

Other Transactions

Recording refunds made

Since MR8 is not a general accounting system, you write refund checks for duplicate payments or overpayments using your accounting system, such as *QuickBooks*. However, you should still record the refund transaction in MR8 so that the Payment Transactions log is complete.

1. On the menu bar in MR8, click **Receivables > Transactions > Other Transactions**.
2. Click **Actions** (or right-click on the grid), then choose **New > Refund**.
3. In the Search Criteria pane, type the invoice number and click **Search** (or press **Enter**).
4. The invoice details appear. Enter the following information:
 - **Account No.** – A refund credits the Checking account. Select an account to be debited in the drop-down. The default is the Refund account.
 - **Transaction Amount** – Enter the refund amount. The default is the invoice amount.
 - **Transaction Date** – Enter the refund date. The default is today's date.
 - **Check No.** – Enter your check number.
 - **Check Date** – Enter the actual date on the check.
 - **Description** – Enter the reason for the refund.
5. Click **Save and Close**.

Other Transactions

Voiding invoices

If a customer returns a product, its invoice must be voided. If an order is billed incorrectly, the invoice(s) should be voided before the order is billed again.

1. On the menu bar in MR8, click **Receivables > Transactions > Other Transactions**.
2. Click **Actions** (or right-click on the grid), then choose **New > Void Invoice**.
3. In the Search Criteria pane, type the invoice number and click **Search** (or press **Enter**).
4. The invoice details appear. Enter the following information:
 - **Not to void Sales Rep Commission** – By default, the sales rep commission will also be voided. Check this box not to void the commission.
 - **Description** – Enter the reason for the void.
5. Click **Save and Close**.

Other Transactions

Writing off uncollectible invoices

If an invoice becomes uncollectible, write it off as a bad debt.

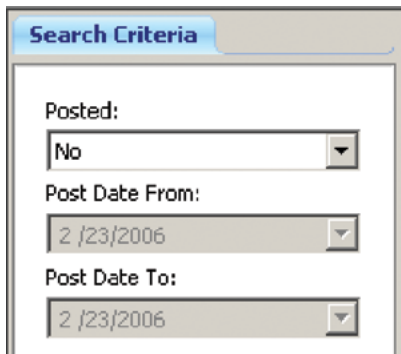
1. On the menu bar in MR8, click **Receivables > Transactions > Other Transactions**.
2. Click **Actions** (or right-click on the grid), then choose **New > Write Off Invoice**.
3. In the Search Criteria pane, type the invoice number and click **Search** (or press **Enter**).
4. The invoice details appear. Enter the following information:
 - **Account No.** – A write-off credits the Accounts Receivable account. Select an account to be debited in the drop-down. The default is the Bad Debt Expenses account.
 - **Void Sales Rep Commission** – By default, the sales rep commission will not be voided. Check this box to void the commission.
 - **Description** – Enter the reason for the write-off. Default is “Uncollectable bad debt.”
5. Click **Save and Close**.

Transactions

Closing out 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.

1. On the menu bar in MR8, click **Receivables > Transactions > Payments**.
2. In the Search Criteria pane, select **No** in the **Posted** drop-down, then click **Search**.



The image shows a screenshot of the 'Search Criteria' dialog box in MR8. It features a title bar with the text 'Search Criteria'. Below the title bar, there are three labeled fields, each with a dropdown arrow on the right side. The first field is labeled 'Posted:' and has 'No' selected. The second field is labeled 'Post Date From:' and has '2/23/2006' selected. The third field is labeled 'Post Date To:' and has '2/23/2006' selected.

3. MR8 lists all the payment transactions that are not posted yet. Click **Check All**.
4. Click **Post**.
5. A confirmation dialog box appears. Click **Yes** to proceed.
6. Repeat steps 2 through 5 to post other transactions.



NOTE

MR8 audits each payment transaction to make sure that the unapplied amount is zero before posting it.

Daily Registers

Printing daily registers

MR8 provides three types of daily registers: sales, cash receipts-payment and cash receipts-other. The *Sales Register* lists all invoices posted for the specified period, grouped and subtotaled by business unit. The *Cash Receipts Register-Payment* lists all payments posted for the specified period, grouped and subtotaled by business unit. The *Cash Receipts Register-Other* lists credit memos, debit memos, duplicate payments, refunds, miscellaneous receipts, voids and write-offs posted for the specified period, grouped and subtotaled by business unit.

1. On the menu bar in MR8, click **Receivables > Daily Registers** (or press **Ctrl + D**).
2. In the Search Criteria pane, **Posted** defaults to Yes and the **Post Date From/To** defaults to today. Change the search filters as needed, then click **Search** (or press **Alt + S**).

3. MR8 lists all the transactions that meet the specified search condition(s) as three separate reports. Each report is shown as a tab.

Sales Register

Business Unit: Hou-DEP

Invoice No.	Bill To Firm	Invoice Date	Invoice Amount	Sales Tax	Net Sales
1031	Law Offices of Steven Pettit	11/14/2005	362.50	0.00	362.50
5506	Berg, Steiner & Chapman	2/3/2006	685.00	0.00	685.00
5507	Kirkland & Ellis Corp	1/23/2006	401.25	0.00	401.25
5508	Pettit & Martinez	1/23/2006	417.50	0.00	417.50
5510	Adams & Abbott Law Firm	1/18/2006	0.00	0.00	0.00
5511	Kirkland & Ellis Corp	1/23/2006	381.30	0.00	381.30
5512	State Farm Insurance	1/23/2006	490.00	0.00	490.00
5518	Kirkland & Ellis Corp	1/23/2006	292.10	0.00	292.10

4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).



NOTE

Daily registers do not include transactions that are not posted. Unposted transactions can be seen in the windows where they were entered (either the Payments or Other Transactions window).

Daily Balance Log

Keeping track of accounts receivable balances

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

1. On the menu bar in MR8, click **Receivables > Daily Balance Log**.
2. In the Search Criteria pane, the **Post Date From/To** defaults to the current month. Change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all dates transactions were posted beginning with the starting date you specified. (**End Balance = Begin Balance + Increase A/R – Decrease A/R**).

	Post Date	Begin Balance	Increase A/R	Decrease A/R	End Balance
	2/16/2006	8,789.18	0.00	720.00	8,069.18
	2/13/2006	6,063.13	2,726.05	0.00	8,789.18
	2/11/2006	5,613.94	449.19	0.00	6,063.13
	2/9/2006	5,212.69	401.25	0.00	5,613.94
	2/3/2006	5,212.69	0.00	0.00	5,212.69
▶	2/2/2006	4,639.78	572.91	0.00	5,212.69

4. Double-click a date to see details. In the detail window, the selected day's transactions are broken out and grouped according to type.

Generate Finance Charges

Generating finance charges

To assess finance charges for overdue invoices, set up finance charge rates in clients' firm records first. (See "Setting up firms.") MR8 generates 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.

1. On the menu bar in MR8, click **Receivables > Finance Charges > Generate Finance Charges**.
2. To assess finance charges for a particular client, click the binoculars button next to the **Firm** field to look up the firm. Otherwise, leave the field blank to generate finance charges for all clients. Click **Search** (or press **Alt + S**).
3. MR8 lists all open invoices that meet the specified search condition(s). All of the invoices are selected automatically. If you do not want to assess a finance charge for any invoice, check its **Select** box to de-select it (or use **Actions > Uncheck All** to de-select everything, then check only the ones you want).
4. Click **Actions** (or right-click on the grid), then click **Generate**.
5. A confirmation dialog box appears. Click **Yes** to proceed.



IMPORTANT

Open invoices belonging to firms that do not have finance charge rates specified in their firm records will not appear in the list.

Clear Finance Charges

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. On the menu bar in MR8, click **Receivables > Finance Charges > Clear Finance Charges**.
2. To clear the finance charges for a particular client, click the binoculars button next to the **Firm** field to look up the firm. Otherwise, leave the field blank to clear finance charges for all clients. Click **Search** (or press **Alt + S**).
3. MR8 lists all invoices having finance charges that meet the specified search condition(s). All of the invoices are selected automatically. If you do not want to clear a finance charge for an invoice, check its **Select** box to de-select it (or use **Actions > Uncheck All** to de-select everything, then check only the ones you want).
4. Click **Actions** (or right-click on the grid), then click **Clear**.
5. A confirmation dialog box appears. Click **Yes** to proceed.



NOTE

MR8 does not actually zero out the finance charge for each 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.

Finance Charges Report

Printing finance charges reports

If you want a hard copy record of finance charges generated, run this report.

1. On the menu bar in MR8, click **Receivables > Finance Charges > Finance Charges Report**.
2. In the Search Criteria pane, the **Finance Charge Date From/To** defaults to today. Change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all the finance charges that meet the specified search condition(s) as a report.

Invoice No.	Invoice Date	Bill To Firm	Invoice Amount	Balance	Finance Charge
1010	1/23/2006	Adams & Abbott Law Firm	375.00	20.00	1.60
5507	1/23/2006	Kirkland & Ellis Corp	401.25	401.25	32.10
5511	1/23/2006	Kirkland & Ellis Corp	381.30	381.30	30.50
5512	1/23/2006	State Farm Insurance	490.00	490.00	39.20
5519	1/23/2006	Law Offices of Steven Pettit	83.42	83.42	6.67
5525	1/23/2006	King & Spalding LLP	73.93	73.93	5.91
5614	1/23/2006	Adams & Abbott Law Firm	83.42	83.42	6.67

4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Monthly Journals

Printing monthly journals

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. Monthly journal reports break down every transaction posted during the selected month into debits and credits. Your accountant uses these journals to prepare your company’s financials.

1. On the menu bar in MR8, click **Receivables > Monthly Reports > Monthly Journals**.
2. In the Search Criteria pane, **Month** defaults to the current month. Change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all the transactions that meet the specified search condition(s) as two separate reports. Each report is shown as a tab.



Sales Journal		OMTI Court Reporting, Inc 2901 Wilcrest Drive, Suite 21 Houston, TX 77048 Phone: 832-203-6083 Fax: 832-203-608		
Business Unit: Hou-DEP				
Account No.	Description	Post Date	Debit	Credit
1100	Accounts Receivable	2/2/2006	572.91	
		2/3/2006		
		2/9/2006	401.25	
		2/11/2006	449.19	
		2/13/2006	2,476.05	
ACCOUNT TOTAL			3,899.40	
4000	Revenue	2/2/2006		572.91
		2/3/2006		
		2/9/2006		401.25
		2/11/2006		449.19
		2/13/2006		2,476.05
ACCOUNT TOTAL				3,899.40

4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).



NOTE

For a definition of debits and credits, see “Appendix A | Accounting basics.”

Statements

Printing monthly statements

Use this function to send monthly statements and/or open invoices to clients. *Monthly statements* summarize each client's overdue invoices. Attorneys receive separate statements unless their firm is flagged to consolidate statements. (See "Setting up firms.")

1. On the menu bar in MR8, click **Receivables > Monthly Reports > Statements**.
2. In the Search Criteria pane, **Invoice Date To** defaults to 30 days ago, so as not to include current invoices. Change the search filters as needed, including:
 - **Business Units (required)** – Defaults to ALL.
3. Click **Search** (or press **Alt + S**).
4. All of the statements that meet the specified search condition(s) appear. MR8 defaults to send each statement in one of three ways:
 - **By email.**
 - **By fax.**
 - **By printout** for manual faxing or mailing.

	Print	Fax	Email	Bill To Firm	Bill To Contact	Amount
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Berg Steiner Chapman LLP	Steve Chapman	10.15
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pettit & Martinez	James Pettit	81.37
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Smith, Connelly & Rice	Holly Rice	68.31
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	State Farm Insurance	Jackie Dollars	410.22

5. Click **Actions** (or right-click on the grid), then click **Send Statements**.

**TIPS**

To include detailed invoices along with statements, select Both (Open Invoices and Statements) in the **View Option** drop-down. Or you can select Open Invoices Only, so as not to include statements.

The default sorting option for invoices is by date first, then invoice number. If you are sending a statement that includes invoices for more than one case, you can choose the Case Name > Invoice Date > Invoice No. option in the **Sorting Invoices** drop-down to have invoices grouped by case first, then within each grouping by invoice date, then invoice number.

**NOTE**

The default method by which a statement is sent comes from either the contact or firm:

- **If a firm is set up for consolidated statements**, then statements are sent via the **Statement Type** setting in the firm's **Additional** tab, and a Notes Log entry is automatically created in the firm. (See "Setting up firms.")
- **If statements are not consolidated**, but instead sent to individual contacts within the firm, the statements are sent via the contact's **Billing Communication Type** setting in the contact's **Additional** tab, and a notes log entry is automatically created in the contact. If emailed, they are sent to the contact's billing email address from the setup screen. (See "Setting up contacts.") If printed, statements have the firm's billing address instead of their main address. (See "Setting up firms.")

Aged A/R

Printing aging reports

This report summarizes each client’s unpaid invoices, grouped by when the invoice was due (aging period). This report can be sorted by name or amount.

1. On the menu bar in MR8, click **Receivables > Monthly Reports > Aged A/R**.
2. In the Search Criteria pane, change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all the firms that meet the specified search condition(s) as a report.

Aged A/R

Firm	Phone No.	Current	Over 30	Over 60
Adams & Abbott Law Firm	713-555-1091	238.30	83.42	
Baker Botts LLP	713.229.1234	473.00		
Berg, Steiner & Chapman	713-842-2600	1,185.00	347.75	
King & Spalding LLP	404.572.4600		73.93	
Kirkland & Ellis Corp	312-555-1234	631.84	865.32	
Law Offices of Steven Pettit	415-555-1234	963.30	83.42	

4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).



NOTE

If you want to include invoices under each firm, select Yes in the **Show Detail** drop-down.

Firm	Phone No.	Current	Over 30
Adams & Abbott Law Firm	713-555-1091	238.30	83.42
	Invoice No.	Invoice Date	Invoice Amount
	1034	9/17/2005	127.20
	5614	1/23/2006	83.42
	5708	2/2/2006	238.30
		Current	Over 30
		238.30	83.42



TIP

In the Search Criteria pane, select Yes in the **Show Firm No.** drop-down to aid in differentiating firms with same name in the results.

Firm	Phone No.	Current	Over 30	Over 60
Kirkwood & Johnson (1007)	312-555-1234	142.90		
Berg Steiner Chapman LLP (1001)	713-555-1234	929.14	1,034.31	1,342.69
Stratford, Wright & Bigsby (1036)	415-555-1234	299.25		

Client Account Activity

Printing client account activity reports

This report lists each client’s monthly activities and unpaid invoices. Monthly activities include invoices, payments, credit memos, debit memos, duplicate payments, refunds, voids and write-offs.

1. On the menu bar in MR8, click **Receivables > Monthly Reports > Client Account Activity**.
2. In the Search Criteria pane, **Post Date From/To** default to last month. Change the search filters as needed, including:
 - **Parent Firm** – To see all activity across one multi-branch firm, broken down by branch office.
 - **Business Units (required)** – Defaults to ALL.
3. Click **Search** (or press **Alt + S**).
4. MR8 lists all of the firms and their transactions posted for the specified period and group by business unit as a report.

Client Account Activity						
Business Unit: DAL						
Firm	Type	Invoice No.	Date	Amount	Balance+	Age Order Date
Adams & Abbott Law Firm 220 Chestnut Street, Suite 3E Houston, TX 77039 Phone:713-555-1091						
	Invoice	5007	9/10/2007	350.70	0.00	8/21/2007
	Payment	5007	10/10/2007	350.70		8/21/2007
FIRM TOTAL					0.00	
Berg Steiner Chapman LLP 510 Louisiana Street, 2nd Floors Houston, TX 77042 Phone:713-555-1234						
	Payment	5028	10/10/2007	108.00		10/3/2007
	Invoice	5028	10/10/2007	108.00	0.00	10/3/2007
FIRM TOTAL					0.00	

5. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Paid Invoices Report

Printing paid invoices reports

This report lists all invoices paid within a specific period, grouped and sorted by payment date.

1. On the menu bar in MR8, click **Receivables > Monthly Reports > Paid Invoices Report**.
2. In the Search Criteria pane, **Business Units** (required) defaults to ALL and the **Payment Date From/To** defaults to today. Change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all the paid invoices that meet the specified search condition(s) as a report.

Paid Invoices

Invoice No.	Invoice Date	Invoice Amount	Payment Amount	Payment Date	Invoice Balance	Bill To Firm
1010	1/23/2006	375.00	355.00	1/23/2006	20.00	Kirkland & Ellis Corp
5518	1/23/2006	292.10	292.10	1/23/2006	0.00	Kirkland & Ellis Corp
5508	1/23/2006	417.50	417.50	1/24/2006	0.00	Pettit & Martinez
5504	12/21/2005	441.25	400.00	1/27/2006	0.00	Berg, Steiner & Chapman
5705	1/30/2006	1,100.00	1,100.00	1/30/2006	0.00	Berg, Steiner & Chapman
TOTAL		2,625.85			20.00	

4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Voided Invoices Report

Printing voided invoices reports

This report lists all invoices voided within a specific period, grouped and sorted by void date.

1. On the menu bar in MR8, click **Receivables > Monthly Reports > Voided Invoices Report**.
2. In the Search Criteria pane, change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all the voided invoices that meet the specified search condition(s) as a report.
4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Summary Invoice

Providing summarized invoices

If you have clients, such as insurance companies, who want summarized invoices listing all of the invoices belonging to a particular case or given period, use the Summary Invoice plug-in. Summary invoices differ from monthly statements, which print only open (unpaid) invoices.

1. On the menu bar in MR8, click **Receivables > Summary Invoice**.
2. Click **Actions** (or right-click on the grid), then choose **New**.
3. In the New Summary Invoice window,
 - **Summary Invoice Date** (required) – Defaults to today. Check the box, then select a different date in the Date Navigator if desired.
 - **Sold To Firm** (required) – Click the binoculars to look up the firm that ordered parts.
 - **Bill To Firm** (required) – Click the binoculars to look up the firm that is paying for the orders.
 - **Bill To Contact** (required) – Select the Bill To Firm's contact from the drop-down.

4. Click **Save and Next**. MR8 automatically fills in the **Summary Invoice No.**, **Created**, **Created By**, **Last Modified** and **Last Modified By** fields. Four buttons—**Delete**, **Post Summary Invoice**, **Print Summary Invoice** and **Void Summary Invoice**—appear.
5. Under **Invoices**, click **Add**.
6. All invoices with more than a zero balance and that meet the criteria entered above appear in the Add Invoices window.
 - If you want to limit the list to invoices belonging to a particular case, enter part of the case name in **Case Name**, then click **Search**.
 - If you want to include invoices that have a zero balance, select Yes in the **Show Zero Amount Invoices** dropdown, then click **Search**.

Accounts Receivable

7. Check the **Add** box of all invoices you want to appear on the summary invoice, or click **Check All** to select the list.
8. Click **Save and Close**.
9. Click **Post Summary Invoice**. MR8 automatically fills in the date and time in the **Post Date** field.
10. If you want to print or export the invoice, click: **Print Summary Invoice >**
 - **Print Summary Invoice w/ Claim No.:** To print the claim number on the summary invoice.
 - **Print Summary Invoice w/o Claim No.:** To print the summary invoice without a claim number.
11. Click the print button or export button in the Preview Summary Invoice window.

Invoice No.	Invoice Date	Amount	Balance	Order.PartNo	Records Of
5045	11/26/2012	125.86	125.86	5002.002	Yong B. Lee
5017	12/3/2012	42.75	42.75	1004.002	Robert Yonger
5097	7/18/2014	666.34	0.00	5021.001	Yong Lee



NOTE

Summary invoices cannot be voided using the Void Invoice function. Instead, if you must void a summary invoice, click **Void Summary Invoice** in the View Summary Invoice window. MR8 will automatically fill in the date and time in the Void Date field.

Collection Manager

Collecting overdue invoices

Use MR8’s collection tools to make your collection efforts more productive. First, print the Aged A/R Report (sorted by amount), so that you can start with the client who owes you the most money for the longest period of time. (See “Printing aging reports.”) Then use the *Collection Manager* to send collection letters (with all of their details automatically filled in by MR8), track collection efforts, record promised amounts and payment dates, and enter follow-up reminder dates.

1. On the menu bar in MR8, click **Receivables > Collections > Collection Manager**.
2. In the Search Criteria pane, select the firm. In the **Party Type** drop-down, choose either:
 - **Sold To** – To view invoices for a client who ordered services.
 - **Bill To** – To view invoices billed to a third party (such as an insurance company).
3. Change other search criteria as needed, then click **Search** (or press **Alt + S**).
4. MR8 lists all of the unpaid invoices that meet the specified search condition(s). Double-click one to see its details.
5. Check the **Letter** box to mark each invoice you want to add to the collection letter. Click **Actions** (or right-click on the grid), then choose:
 - **Letter** – To print separate letters for each invoice selected.
 - **Letter-Enhanced** – To consolidate multiple invoices (up to 200) into a single letter.

Dear Mr. Berg:

Invoice No.	Invoice Date	Balance	Job Date	Case Name
7838	06/07/2012	808.27	06/22/2012	
7862	09/11/2012	539.04	08/08/2012	
7883	09/11/2012	539.04	08/08/2012	

I have been unable to reach you by telephone regarding your past due account in the amount of \$

6. In the Select Form window, click a form letter to select it and click **Open**. (Or double-click the letter.)
7. Edit the letter, if desired, and click **File > Print** (or the print button).
8. To prepare to talk with the client, click **Actions > 90-day Payment History**. The Payment Inquiry window opens with the client’s past 90-day history already filled in. (See “Searching for payment histories.”)
9. In the Collection Manager, right-click the invoice you want to call the client about, then choose **Firm**.
10. The firm’s detail window opens, and the **Collection Info** tab is automatically selected. Click **New**.
11. In the New Collection Log window, enter the following information:
 - **Action Type** – Select an action type in the drop-down. The default is Call Made.
 - **Action Date** – The default is the current date and time.
 - **Remind Date** – Enter the date for a follow-up. You will receive a reminder message on that day from the Message Center. See “Communicating within RB8.”
 - **Notes** – Type the collection notes (each entry can contain up to 7000 characters).

12. Click **Save and Close**.



BEST PRACTICES

In the Collection Info tab, enter the promised amount and date. Then run the Collection Forecast report to forecast cash inflows to your business. (See “Forecasting cash flow from collections.”)

Firm Name	Promised Date	Promised Am...	Collector
Berg, Steiner & Chapman	2/27/2006 1:20...	927.40	Nancy Adams

Collection Follow-up

Following up on collection promises

Pull up the past action and/or remind list to keep collection tasks on track.

1. On the menu bar in MR8, click **Receivables > Collections > Collection Follow-up**.
2. In the Search Criteria pane, change the search filters as needed, then click **Search** (or press **Alt + S**).
3. MR8 lists all the clients with follow-up dates for the specified period.

Firm Name	Action Type	Action Date	Remind Date	Remarks
Berg, Steiner & Chapman	Call Made	2/23/2006 1...	3/3/2006 10:00:00 AM	Talked to Mary at AP. She will
Law Offices of Steven P...	Call Made	2/23/2006 1...	2/28/2006 11:54:00...	Check in the mail.

4. Double-click the client you want to follow up. The firm’s detail window opens, and the **Collection Info** tab is automatically selected.
5. Click **New** to record the follow-up action. (See “Collecting overdue invoices.”)

Collection Forecast

Forecasting cash flow from collections

Based on the amounts and dates promised by clients for outstanding invoices, you can forecast cash inflow to your business.

1. On the menu bar in MR8, click **Receivables > Collections > Collection Forecast**.
2. In the Search Criteria pane, specify the **Promised Date** range, then click **Search** (or press **Alt + S**).
3. MR8 lists all the clients with payment-promised dates for the specified period.

Firm Name	Promised Date	Promised Am...	Collector
Berg, Steiner & Chapman	2/27/2006 1:20...	927.40	Nancy Adams
Law Offices of Steven Pettit	2/28/2006 1:21...	500.00	Steve Green
Smith, Connelly & Rice	2/28/2006 1:21...	1,350.00	Steve Green

4. Double-click a client to view details. The firm’s detail window opens, and the **Collection Info** tab is automatically selected.

Chapter 9: Payables

Use MR8's Payables module to print fee checks/make credit card payments, and generate reports, such as sales commission or sales tax reports. Audit and reconcile fee checks/payments to get a handle on your custodian fee spending.

Functions covered in this chapter:

Request Checks

Print Checks

Check Reconciliation Report

Fee Checks

Sales Commission Report

Override Sales Commission

Sale Tax Report

Bank Reconciliation



Entering check requests in batches

Check requests are normally entered through the Case Manager function while expeditors are talking to custodians on the phone. However, if you have someone (such as bookkeeper) enter all of the requests from the vouchers, start with the Request Checks function instead of Case Manager. You can designate payment by either check or credit card.

1. On the menu bar in MR8, click **Payables > Request Checks**.
2. Right-click on the grid, then choose **New**.
3. In the New Check window, enter an order number and part number, then click **Search**.

The screenshot shows a form with the label 'Order-Part No.:' followed by two input fields. The first field contains the number '5002' and the second field contains the number '2'. To the right of these fields is a button with a binoculars icon and the text 'Search'.

4. In **Payment Type**, select Check or Credit Card in the drop-down.
5. If you selected Check:
 - **Check Date** – Default is today. Change if needed.
 - **Check Amount** – enter the amount of the custodian fee.
6. If you selected Credit Card:
 - **Credit Card No.** – Enter the payee’s credit card number (numerals only, no spaces or dashes) or select in the drop-down.
 - **Pay Date** – Default is today. Change if needed.
 - **Amount** – enter the amount of the custodian fee.
7. Enter the following information:
 - **Account No.** – The default is the Custodian Expenses account number specified in the Business Unit.
 - **Payee** – The default is the custodian (Same as Location). If you are paying a vendor, select Firm in the drop-down and click the binoculars button to select the vendor from the Firms table. If you are paying another location (e.g., ROI handled by), select Other Location in the drop-down and click the binoculars button to select the location.
8. Click **Save and New**.
9. Repeat steps 3 through 8 to enter additional checks.



NOTE

When you save a check request, the date and time are recorded and your name is recorded as the issuer. **Issued By** and **Issued** fields appear in the View Check screen, and the same information appears in columns in the Request Checks’ main grid and Fee Checks’s main grid.

Printing custodian fee checks

Even though anyone can enter check requests, there should be one person (in the accounting department) responsible for printing checks. You can print custodian fee checks directly from MR8 or export them to *QuickBooks* (see “Exporting checks to *QuickBooks*”).

1. On the menu bar in MR8, click **Payables > Print Checks**.
2. In the Search Criteria pane, **Check Date From/To** default to today. Change the dates if necessary, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the checks requested for the specified period along with their check amounts.
4. Enter the following information:
 - **Starting Check No.** – Enter the starting check number. MR8 supports *QuickBooks*-compatible laser checks (standard or voucher).
 - **Voucher Checks** – Check this box if you are using voucher checks (one check per sheet).
5. Click **Actions** (or right-click on the grid), then choose **Print Checks**. Click **OK** in the pop-up window.



TIP

If the MR8 information does not print in the correct place on your checks, you can alter its placement. In the Print Checks window, right-click the grid and select **Alignment Setup**. In the Alignment Setup window, use the key at the top as a guide to decide which values to alter in the fields below.

Exporting checks to QuickBooks

QuickBooks (for Windows) imports and exports data in .iif format (Intuit Interchange Format). If you prefer to use *QuickBooks* for printing custodian fee checks, you can export an .iif file from MR8 to import into *QuickBooks*.

1. On the menu bar in MR8, click **Payables > Print Checks**.
2. In the Search Criteria pane, **Check Date From/To** default to today. Change the dates if necessary, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the checks requested for the specified period along with their check amounts.
4. Click **Actions** (or right-click on the grid), then choose **Export > QuickBooks**.
5. In the Save As window, type a filename in the **File Name** field, then click **Save**.

Importing checks into QuickBooks

After exporting checks as a *QuickBooks* file (iif), import the file into *QuickBooks*.

1. On the menu bar in *QuickBooks*, click **File > Import > IIF Files**.
2. In the Import window, change **Look in** to the location you saved the file to. Click the file you want to import, then click **Open**.



IMPORTANT

Before you can import a file (exported from MR8) into *QuickBooks*, you must add two MR8 account numbers, “Checking” and “Custodian Expenses,” to the Chart of Accounts in *QuickBooks*. (See “Chart of Accounts.”)

Reprinting checks

Sometimes things go awry when you’re printing checks. For example, the paper jams, you run out of toner or checks were in the tray upside down. To reprint checks, simply clear out the check numbers. Once the check numbers are cleared, the checks will appear in the Print Checks window again.

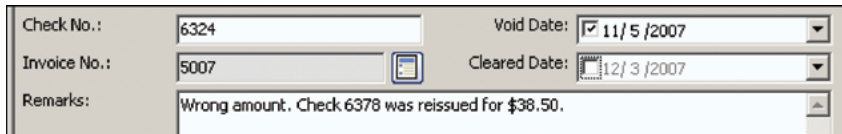
1. On the menu bar in MR8, click **Payables > Fee Checks**.
2. In the Search Criteria pane, enter the search filters, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the checks that meet the specified search condition(s).
4. Right-click the checks that you want to reprint, then choose **Clear Check No**. Click **Yes** in the pop-up. Now you can return to the Print Checks window to reprint the check.

Voiding payments

If the payment amount was wrong or you paid a wrong party, void the check/credit card payment first before issuing another one.

1. On the menu bar in MR8, click **Payables > Fee Checks**.
2. In the Search Criteria pane, enter the search filters, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the checks that meet the specified search condition(s).
4. Double-click the check that you want to void.

5. In the check detail window, check the **Void Date** box and enter the void date. You can also enter the reason in the **Remarks** field.



The screenshot shows a check detail window with the following fields and values:

Check No.:	6324	Void Date:	<input checked="" type="checkbox"/> 11/5/2007
Invoice No.:	5007	Cleared Date:	<input type="checkbox"/> 12/3/2007
Remarks:	Wrong amount. Check 6378 was reissued for \$38.50.		

6. Click **Save and Close**.

Fee Checks

Searching for payments

Search for issued checks and credit card payments by order number, payment date, check/credit card number, invoice number, voided date, cleared date or payee. Then get detailed information or print check registers.

1. On the menu bar in MR8, click **Payables > Fee Checks**.
2. In the Search Criteria pane, enter the search filters, then click **Search** (or press **Alt + S**).
3. MR8 lists all of the checks and credit card payments that meet the specified search condition(s).
4. Most of the issued payment details are listed in the results displayed, but you can double-click a payment to see additional details.

Check Reconciliation Report

Controlling custodian fee expenses

If you took a poll of firm owners and asked what the most difficult task in running a records retrieval business is, the almost overwhelming answer would be: keeping custodian expenses under control. Remember, you can't control what you can't see. Use the Check Reconciliation Report to monitor your custodian fee spending closely.

1. On the menu bar in MR8, click **Payables > Check Reconciliation Report**.
2. In the Search Criteria pane, **Check Date From/To** default to today. Change the dates if necessary, then select one of the following categories in the **Type** drop-down:
 - **Not Billed** – To find all of the work orders that have not been billed yet, even though the custodian fees have been spent already.
 - **Under Billed** – To find all of the work orders that have been under billed (i.e., the billed amount is less than the fee paid).
 - **Correctly Billed** – To find all of the work orders that have been billed correctly (i.e., the billed amount is equal or greater than the fee paid).
 - **Unpaid** – To find all of the work orders that have been billed, but not yet paid by the client.
3. Click **Search** (or press **Alt + S**).
4. MR8 lists all of the work orders that meet the specified search condition(s).
5. Click **Actions** (or right-click on the grid), then choose **Print Preview** or **Export**.

Reconciling bank accounts

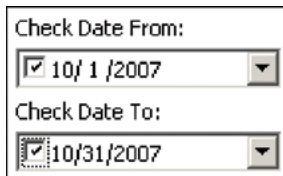
Reconciling bank accounts is fancy terminology for “balancing my checkbook,” which might be one of the most annoying tasks connected with paying custodians. After your bank statement arrives, find some uninterrupted moments to compare it to the information in MR8 and update your MR8 records.

Fee Checks

Clearing payments manually

With the statement in hand, record in MR8 which checks/credit card payments have cleared. All of the checks that are on your bank statement are cleared checks, and all payments listed on credit card statements are cleared payments. Any checks/credit card payments not listed on the statement have not cleared.

1. On the menu bar in MR8, click **Payables > Fee Checks**.
2. In the Search Criteria pane, select a check date range, then click **Search** (or press **Alt + S**).



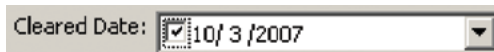
Check Date From:
 10/ 1 /2007

Check Date To:
 10/31/2007

3. MR8 lists all of the payments issued for the specified period.
4. Click the **Check No./Credit Card No.** column header to sort the payments by number since most bank statements list your checks in that order.

	Order-Par...	Payment Type	Check Date	Check No./Credit Card No.
▶	5087.009	Check	10/30/2018	121
	5201.001	Check	11/13/2019	122

5. Double-click each check/credit card number from the statement, then enter the cleared date in the detail window.



Cleared Date: 10/ 3 /2007

6. Click **Save and Close**.

Clearing checks automatically

Automatic Bank Reconciliation is a paperless bank reconciliation procedure that imports information from an external file to clear checks automatically. Since most major banks have the ability to generate a data file that contains similar information to the “paper” statement, MR8 can accept that data, process it and produce reports.

1. On the menu bar in MR8, click **Payables > Bank Reconciliation > Import Check Reconciliation Data**.
2. Click **Actions** (or right-click on the grid), then choose **Data Layout Settings**. Enter the starting and ending character position for each field. The settings must correspond to the file layout provided by your bank.

	Start	End	Decimal Places
Check Number:	17	26	
Check Amount:	42	53	2
Cleared Date - Month:	28	29	
Cleared Date - Day:	30	31	
Cleared Date - Year:	32	33	

3. Click **OK**.
4. In the Search Criteria pane, click the binoculars button to select the file to import and click **Open**, then click **Import**.

5. MR8 processes the file, clearing the matching checks, then displays the results as four tabs on the grid:
 - **Check number not found**
 - **Amount mismatch**
 - **Check number marked cleared**
 - **Other**



TIP

Click **Bank Reconciliation > Bank Reconciliation Report** to generate a report listing all checks cleared (or not cleared) for a given period.

Printing sales commission reports

View all invoices that include a commission, grouped and subtotaled by sales rep (account executive). A commission is automatically generated from invoices on orders *initiated* by a sales rep's client.

1. On the menu bar in MR8, click **Payables > Sales Commission Report**.
2. In the Search Criteria pane, specify the following search filters:
 - **Date Type** – Select Post Date or Payment Date in the drop-down. If you pay commissions only on paid invoices, select Payment Date.
 - **Date From/To** – Select a date range.
 - **Sales Rep** – Click the binoculars to look up and select a sales rep.
 - **Exclude Copies** – Select Yes if you do not pay commissions on copy sales.
 - **Deduct Custodian Fee** – Select Yes if you pay commissions based not on the entire invoice amount but on the net revenue (i.e., invoice amount minus custodian fee).
3. Click **Search**. MR8 lists all of the invoices that meet the specified search condition(s) as a report.
4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Sales Commission Report							
Resource: David Sales							
Ordering Firm	Ordering Contact	Invoice No.	Invoice Date	Order.Part No.	Job Date	Payable Amount	Commission
Berg Steinner Chapman LLP		Houston, TX					
Daniel Berg							
		5043	1/18/2007	5002.001	10/16/2007	44.35	2.22
		5031	8/8/2007	1004.004	9/10/2007	11.00	0.55
		5030	9/6/2007	1004.004	9/10/2007	11.00	0.55
		5014	9/11/2007	1004.001	9/10/2007	12.65	0.63



NOTE

To understand how sales commissions work in MR8, you should be aware of the following:

- When a case is created, a particular sales rep is tied to the case. The default comes from the setting in the Contacts table.
- The commission is calculated by multiplying the commissionable (payable) amount by the commission rate specified in **Tools > Users and Groups**.
- The commissionable amount is calculated by adding all of the service items on the invoice that are marked as “commissionable.” Whether a particular service item is commissionable or not is specified in **Setup > Service Items Master**.
- You can override the commissionable amount in **Payables > Override Sales Commission**. Use the search criteria to find the invoice(s) on which you want to override the commission. Double-click each invoice in the grid, then change the amount in the **Commissionable Amount field** and click **Save and Close**.

Printing sales tax reports

View all invoices having sales tax charges generated for a specific period.

1. On the menu bar in MR8, click **Payables > Sales Tax Report**.
2. In the Search Criteria pane, change the search filters as needed, then click **Search**.
3. MR8 lists all of the invoices that meet the specified search condition(s) as a report.
4. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).



NOTE

To understand how sales tax works in MR8, you should be aware of the following:

- The sales tax rate is specified for each client in the Firms table. See “Setting up firms.”
- 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. See “Adding service items.”

Chapter 10: Reports

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

Functions covered in this chapter:

Business Analysis

Invoices

Misc. Sales

Client Rating Report

Insurance Billing

Processor Production

Report Export

Report Search



Analyzing your business

Get an instant snapshot of your business. Compare the current month-, quarter- and year-to-date totals to the previous period.

1. On the menu bar in MR8, click **Reports > Financial > Business Analysis**.
2. In the Search Criteria pane, specify the following search filters:
 - **Post Date From/To** – Invoices posted for the specified period will be summarized.
 - **Party Type** – Select Sold To or Bill To in the drop-down.
 - **Firm** – Leave blank unless you are analyzing business for a particular client.
 - **Party’s State** – If you pay local business taxes based on the total revenue generated within your own state, select the state to break out that information.
 - **Case** – Leave blank unless you are analyzing business for a particular case.
 - **Business Units** – Select business unit(s) in the drop-down. The default is ALL.
3. Click **Search**.
4. MR8 summarizes all of the invoices that meet the specified search condition(s). To save the result as a file, click **Actions > Export**. Then choose either HTML or Excel.

9 Facts				
Year				
2007				
Totals				
Group	Amount	Units	Amount	Units
1. Original	229.67	418.00	229.67	418.00
2. Copy	353.10	642.00	353.10	642.00
3. Custodian	407.40	5.00	407.40	5.00
9. Misc. Charge	1,328.20	103.50	1,328.20	103.50
Totals	2,318.37	1,168.50	2,318.37	1,168.50



TIPS

You can click any plus (+) sign to expand the level, displaying its subcategories underneath. For example, click the “+” next to the year to show the quarters. Then you can compare the revenue from quarter to quarter.

2007	
3	4

Invoices

Printing invoice reports

View all invoices generated for a specific period, sorted by invoice number, order-part number or firm.

1. On the menu bar in MR8, click **Reports > Financial > Invoices**.
2. In the Search Criteria pane, specify the following search filters:
 - **Business Units** – Select business unit(s) in the drop-down. The default is ALL.
 - **Date Type** – Specify whether to select invoices based on the invoice date or posted date.
 - **Date From/To** – Enter an invoice date range.
 - **Invoice Type** – Select an invoice type in the drop-down. The default is ALL.
 - **Show Open Invoices Only** – Select Yes to show open (unpaid) invoices only.
 - **Sort By** – Select Invoice No., Order-Part No. or Firm Name in the drop-down.
3. Click **Search**.
4. MR8 lists all of the invoices that meet the specified search condition(s) as a report. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Invoices						
Invoice No.	Invoice Date	Invoice Amount	Balance	Payment Date	Void Date	Bill To Firm
5007	9/10/2007	350.70	0.00	10/10/2007		State Farm Insurance
5014	9/11/2007	21.15	1.15			Pettit & Martinez
5015	9/11/2007	21.15	21.15			Smith, Connolly & Rice
5016	9/11/2007	21.15	0.00	11/28/2007		Berg Steinner Chapman LLP
5029	9/7/2007	115.00	0.00		10/15/2007	State Farm Insurance
5030	9/6/2007	19.50	0.00			Pettit & Martinez
TOTAL		433.65	22.30			5 Invoice(s)
VOID TOTAL		115.00				1 Invoice(s)

Misc. Sales

Printing miscellaneous sales reports

This report summarizes each invoice (containing the specified service items), grouped and subtotaled by client. For example, you can find out which clients are buying new services you introduced recently using this report.

1. On the menu bar in MR8, click **Reports > Financial > Misc. Sales**.
2. In the Search Criteria pane, specify the following search filters:
 - **Business Units** – Select business unit(s) in the drop-down. The default is ALL.
 - **Post Date From/To** – Invoices posted for the specified period will be summarized.
 - **Service Item Subgroup** – Select a subgroup in the drop-down. Only those service items belonging to the selected subgroup appear in the **Service Items** drop-down below.
 - **Service Items** – Select service item(s) in the drop-down. The default is ALL.
 - **Sort By** – Select Amount or Firm Name in the drop-down.
3. Click **Search**.
4. MR8 lists all of the service items that meet the specified search condition(s) as a report. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Misc. Sales		No. of Usage	Amount
Berg Steinner Chapman LLP	510 Louisiana Street, 2nd Floors Houston, TX 77042		
	Daniel Berg	8	115.00
	Marian Smith	2	7.50
	Steve Chapman	3	22.50
	FIRM TOTAL	13	145.00
Smith, Connelly & Rice	10 Market Plaza, Suite 1200 Concord, TX 77850		
	Holly Rice	7	70.00
	FIRM TOTAL	7	70.00

Client Rating Report

Printing client rating reports

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. On the menu bar in MR8, click **Reports > Client > Client Rating Report**.
2. In the Search Criteria pane, specify the following search filters:
 - **Business Units** – Select business unit(s) in the drop-down. The default is ALL.
 - **Post Date From/To** – Invoices posted for the specified period will be summarized.
 - **Parent Firm** – Leave blank unless you want to analyze the rating for (subsidiary) firms that belong to a particular parent firm.
 - **Firm** – Leave blank unless you want to analyze the rating for a particular firm.
 - **Billing Rate Group** – Select billing rate group(s) in the drop-down.
 - **Group By** – Select Sold To or Bill To in the drop-down.
 - **Sort By** – Select Amount or Firm Name in the drop-down.
3. Click **Search**.
4. MR8 lists all of the invoices that meet the specified search condition(s) as a report. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Client Rating Report							
Firm	Contact	Original		Copy		Total	
		Count	Amount	Count	Amount	Count	Amount
Berg Steinner Chapman LLP	510 Louisiana Street, 2nd Floors Houston, TX 77042			Phone:713-555-1234			
	Daniel Berg	8	1,171.74			8	1,171.74
	Marian Smith	1	108.00			1	108.00
	Steve Chapman			3	46.40	3	46.40
	FIRM TOTAL	9	1,279.74	3	46.40	12	1,326.14
Adams & Abbott Law Firm	220 Chestnut Street, Suite 3E Houston, TX 77039			Phone:713-555-1091			
	Yong B. Lee	2	563.95			2	563.95
	FIRM TOTAL	2	563.95			2	563.95



BEST PRACTICES

Another way to come up with a meaningful holiday gift list is to run the **Order Analysis** report sorted by the number of net orders. Then you will know which clients are generating the most business for your firm and to whom you want to send gifts of appreciation. (See “Know who is calling.”)

Insurance Billing

Printing insurance billing reports

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

1. On the menu bar in MR8, click **Reports > Client > Insurance Billing**.
2. In the Search Criteria pane, specify the following search filters:
 - **Business Units** – Select business unit(s) in the drop-down. The default is ALL.
 - **Post Date From/To** – Invoices posted for the specified period will be summarized.
 - **Billing Rate Group** – Select billing rate group(s) in the drop-down.
3. Click **Search**.
4. MR8 lists all of the invoices that meet the specified search condition(s) as a report. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Insurance Billing							
Billing Rate Group: State Farm Insurance							
Firm	Invoice No.	Date	Amount	Balance	Order.Part No.	Order Date	Records Of
Adams & Abbott Law Firm 220 Chestnut Street, Suite 3E Houston, TX 77039 Phone:713-555-1091							
	5007	9/10/2007	350.70	0.00	1002.001	8/21/2007	Steven Qgar
FIRM TOTAL			350.70	0.00			
Berg Steinner Chapman LLP 510 Louisiana Street, 2nd Floors Houston, TX 77042 Phone:713-555-1234							
	5012	9/20/2007	190.57	0.00	1004.001	9/10/2007	Robert Yonger
	5027	10/10/2007	202.50	0.00	1009.001	9/11/2007	Mike Frazer
	5028	10/10/2007	108.00	0.00	5001.001	10/3/2007	John Small
FIRM TOTAL			501.07	0.00			
BILLING RATE GROUP TOTAL			851.77	0.00			



BEST PRACTICES

When insurance companies ask for a report that breaks down their invoices by law firm and attorney, provide this report.

Processor Production

Printing processor production reports

View all invoices generated (i.e., records obtained) for a specific period, grouped and subtotaled by processor (or client rep).

1. On the menu bar in MR8, click **Reports > Other > Processor Production**.
2. In the Search Criteria pane, specify the following search filters:
 - **Business Units** – Select business unit(s) in the drop-down. The default is ALL.
 - **Post Date From/To** – Invoices posted for the specified period will be summarized.
 - **User** – Leave blank unless you want to analyze the production for a particular user.
 - **Type** – Select Processor or Client Rep in the drop-down.
3. Click **Search**.
4. MR8 lists all of the invoices that meet the specified search condition(s) as a report. Click the print button for a hard copy, or click the export button to create an electronic file to archive or email (see “Exporting reports”).

Processor Production						
User: Alicia Smith						
Invoice No.	Invoice Date	Order.Part No.	Order Date	Invoice Amount	Balance	Case Name
5012	9/20/2007	1004.001	9/10/2007	190.57	0.00	Yonger vs. Merck
5014	9/11/2007	1004.001	9/10/2007	21.15	1.15	Yonger vs. Merck
5015	9/11/2007	1004.001	9/10/2007	21.15	21.15	Yonger vs. Merck
5016	9/11/2007	1004.001	9/10/2007	21.15	0.00	Yonger vs. Merck
USER TOTAL				254.02	22.30	

Report Export

Exporting reports

The native file format for all reports in MR8 is Crystal Reports (*.rpt). However, you can export all of your reports in PDF format for electronic archiving purposes and for transmitting to your accountant, banker, company officer, etc. — anyone who needs to review your reports, but does not use MR8.

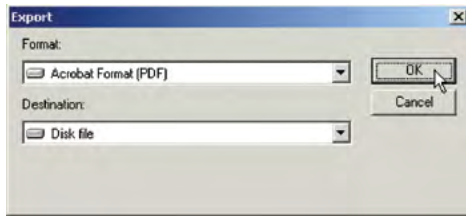
In addition to PDF, MR8 reports can be exported in a wide variety of popular formats, including *Microsoft Word* and *Excel*, HTML, XML, ODBC and common data interchange format.

1. In the Preview screen of any report, click the export button.

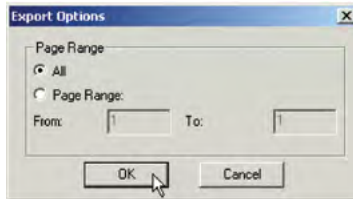


Export button

2. In the Export window, select an export format in the **Format** drop-down. Select a destination for your file in the **Destination** drop-down. Click **OK**.



3. In the Export Options window, select the page range. Click **OK**.



4. In the Choose export file window, enter a file name, then click **Save**.



TIP

To email a report, select MAPI in the Export dialog box **Destination** drop-down. In the Send Mail dialog box, enter your personal email account, then click **Send**.

Report Search

Searching reports

You can use the search-text capability built into Crystal Reports to locate any instance of a word, series of words, or part of a word in a report.

1. In the Preview screen of any report, click the search button.



Search button

2. In the Search window, enter the text you want to search for in the **Find what** field, then click **Find Next**.



3. If the text is found, the area containing the text is highlighted.
4. Keep clicking **Find Next** until you find all instances of the text.

Chapter 11: Tools

Reach for this toolbox when you want to manage your MR database, perform custom searches of your MR database, search notes logs, organize your database for marketing and other uses, track repository access, and integrate your system with *QuickBooks*.

Functions covered in this chapter:

Database Manager

Query Maker

Notes Finder

Tag Manager

Repository Access Log

Integrator for *QuickBooks*



Other functions are covered elsewhere:

Code Manager

Chapter 3: Getting Started

Users and Groups

Chapter 3: Getting Started

Form Manager

Chapter 3: Getting Started

System Preferences

Chapter 3: Getting Started

Web

MR Web 8 Getting Started Guide for Office Staff

Database Manager

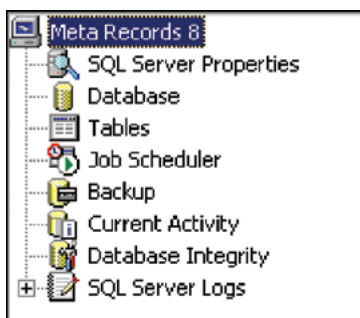
MR8 uses Microsoft SQL Server as its database engine. Maintaining the SQL Server is your technician's responsibility and beyond the scope of this guide. And some processes are automatic, such as re-indexing and defragmenting (i.e., performance tuning) which runs on the first day of each month to help with MR's performance. However, MR8 provides simple tools to manage important database tasks such as backup.

Database Manager

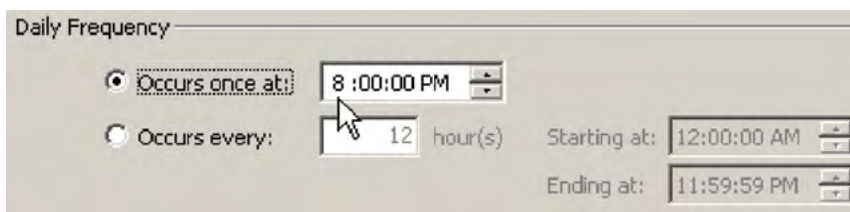
Preparing for disasters

Business owners, like Boy Scouts, should always be prepared. You must have an automated backup system in place for your files, preferably to an off-site location. When the MR8 Server is installed initially, an automatic task is created that will make a backup of your MR8 database at a specified time every day. It is your responsibility to back up this backup file (and the repository file folders) to external devices and store them away from the office.

1. On the menu bar in MR8, click **Tools > Database Manager**.
2. On the left side of the Database Manager window, icons appear representing the main functions.



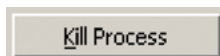
3. Click **Backup** if you need to modify the original settings that were entered by OMTI. For example, you might want to change the time the backup starts.



NOTE

After each database backup, the log file is truncated to keep the log file size down, saving space on your server's hard drive.

4. Click **Current Activity** to see all of the users who are currently logged into MR8. To terminate a session (process) that is hanged or no longer valid, click **Kill Process** (located at the bottom right).



WARNING

Be careful when terminating a process. If you terminate an application, any unsaved data will be lost.

Query Maker

What is a database?

A *database* is a place where organized information is stored for a purpose. There are many types of databases; MR8 uses a *relational database*. Relational databases store and display data in a *tabular* format of *rows* and *columns*, like a spreadsheet.

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.

Query Maker

What is SQL?

A database is a powerful tool, but without a way to quickly and easily retrieve all of the valuable information stored inside, it would be useless. Luckily, there is a standardized way of asking a database to give us the specific information we need: *Structured Query Language*, or *SQL*. SQL (pronounced as the letters S-Q-L or the word *sequel*) is a language designed specifically for communicating with databases.

SQL uses a simple basic grammar. To ask a database engine to find something, we construct a(n) *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.

Common requests for information in MR8 are already built in, and are triggered by entering text in fields and/or clicking buttons in the different windows in MR8. You can make your own customized searches of your MR8 database, however, using Query Maker.

Query Maker

What is Query Maker?

Query Maker is a powerful tool built into MR8 that can generate SQL statements automatically. It lets you harness the power of SQL without actually learning SQL grammar. You specify search conditions, and MR8 constructs the proper SQL statements and returns the results.

Query Maker

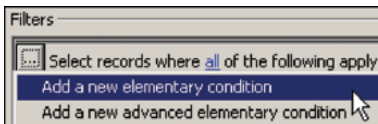
Using Query Maker exercise: Creating a list of attorneys

To understand Query Maker and see what it can do for you, follow this exercise of building simple queries and returning results to find all of the attorneys in your database, who are located in either Houston or Dallas.

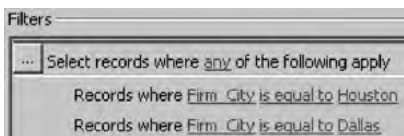
1. On the menu bar in MR8, click **Tools > Query Maker**.
2. On the left side of the Query Maker window, folders appear representing the views and tables in MR8. Click the “+” next to **Views** to expand the level, displaying its contents underneath.



3. Right-click the **Contacts with Firm** view, then choose **New**.
4. In the Filters section, click the ... button, then choose Add a new elementary condition from the drop-down.



5. The default statement “Records where * is equal to *” appears.
6. Click the left asterisk (*), and select the Firm_City field in the drop-down.
7. Click the right asterisk and enter “Houston” in the textbox.
8. Click the ... button, then choose Add a new elementary condition from the drop-down.
9. The default statement “Records where * is equal to *” appears.
10. Click the left asterisk (*), and select the Firm_City field in the drop-down.
11. Click the right asterisk and enter “Dallas” in the textbox.
12. In the statement, Select records where all of the following apply, click **all**, then choose any in the drop-down.
13. In the Filters section, check that your statement appears as the following:



14. In the Columns section, uncheck the fields you do not want to show.
15. Click **Execute**. The SQL statement you built is processed, and the result of the query appears in a grid in the Result section.

**TIP**

Right-click anywhere on the grid, then choose **Print Preview** to preview the list onscreen and send it to a printer. Choose **Export** to save the list as an Excel file.

Query Maker

Using operators

Query Maker uses *operators*, filters you apply to fields in your database, to find specific information. The following is a list of common operators used in MR8's Query Maker:

Operator	Meaning
equal	Equal to
greater	Greater than
less	Less than
greater or equal	Greater than or equal to
less or equal	Less than or equal to
not equal	Not equal to
is empty	Determines whether a specified field is null
is not empty	Determines whether a specified field is not null
contains	To search for a match anywhere in the text field
starts with	To search for a match in the beginning of the text field

When you have more than one filter conditions (our example had two), they can be combined using the special operators, **all** and **any**. **All** tells the database to retrieve only those records matching *all* the specified conditions. **Any** tells the database to retrieve only those records matching *any* of the specified conditions.

Query Maker

Saving SQL statements

Instead of re-typing a standard query each time you use it, save it as a Query Maker file. Both search criteria and selections made in the View tab will be saved for later reuse.

1. With the query you want to reuse entered, click **Save**.
2. In the Save window, type a name for the file in the **File name** field. Then click **Save**.



TIP

To save the file in a different folder, click a different location in the **Save in** list or a different folder in the folder list, or both. To save the file in a new folder, click **New Folder**.

Query Maker

Using previously-saved SQL statements

Save time and reduce errors by re-using queries you created and saved in Query Maker.

1. On the menu bar in MR8, click **Tools > Query Maker**.
2. In the Query Maker window, click **File > Open**.
3. In the **Look in** drop-down in the Open window, click the drive or folder that contains the Query Maker file you want to open. In the folder list, locate and open the folder that contains the file. Click the file, then click **Open**.



NOTE

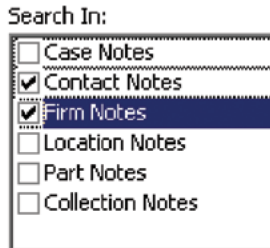
In database theory, a *view* is, in essence, a virtual table. It does not physically exist. Rather, it is created by a query joining one or more tables. Using views, you can build queries accessing more than one table at the same time.

Notes Finder

Searching for notes

Since MR8 offers so many places where you can enter notes, it is sometimes difficult to remember exactly where a particular note was entered. To that end, MR8 provides a very powerful tool for you to search for a word or phrase in various notes logs.

1. On the menu bar in MR8, click **Tools > Notes Finder**.
2. In the Search Criteria pane, check the notes log(s) you want to search in the **Search In** section. Enter other search filters as needed, then click **Search**.



3. MR8 lists all of the note entries that meet the specified search condition(s) grouped under each tab. Sort notes and arrange columns as desired (see “Working with the Results pane”).

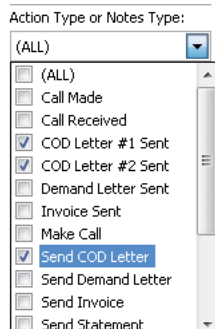
Case Name	Type	Date	Entered By	Entered	Cancelled By	Cancelled
▶ Alvarez vs. Interfinacial Sales Rep changed: David Sales -> Hongki Kim		5/15/2015 9:42:00 AM	Ikbum Kim	5/15/2015 9:42:16 AM		
Amit Patel vs. Kushal Patel Amit needs an Interpreter. His hearing is not the best, so if possible, hire a Real Time Interpreter as well.		5/12/2015 10:43:00 AM	Matthew Huh	5/12/2015 10:41:16 AM		
Amit Patel vs. Kushal Patel Created		4/3/2015 9:22:00 AM	Matthew Huh	4/3/2015 9:22:17 AM		
Apple Corp. vs Praveen ... Created		4/1/2015 8:26:00 AM	Matthew Huh	4/1/2015 8:25:42 AM		
Barry Green vs Isis Harden Created		4/2/2015 11:47:00 AM	Matthew Huh	4/2/2015 11:47:16 AM		

4. To view more information associated with a note, double-click the note.



TIP

You can search any notes log by its Notes or Action Types. Different notes logs have different Notes/Action Types that you set up in Code Manager (see “Adding drop-down entries”). For example, if you check “Collection Notes” in Search Criteria, this search filter lists all of the Action Types entered in your Code Manager under Firms > Collection Action Type. Because each Notes Log has different Notes Types, this filter only works when one type of Notes Log is checked.



Firm Name	Type	Date	Entered By	Entered
▶ Adelson, Testan, Brund... test	Send COD Letter	8/6/2014 2:10:00 PM	Jason Yee	8/6/2014 2:10:11 PM

Tag Manager

Organizing with tags

Tags provide a way for you to organize firms, contacts, resources and locations. Tags are especially helpful in organizing firms for marketing purposes and contacts for customer service treatment. You can use any words as a tag. For example, you might have a tag for your best clients (“Top 25”) who require constant monitoring.

1. In a firm, contact, resource or location window, click the **Tags** tab.
2. Click **New**.
3. In the New Tag window, select a tag in the drop-down. If the desired tag doesn’t exist, set it up in the Code Manager (see “Adding drop-down entries”) or manually enter the tag name.
4. Click **OK**. A single entity can have an unlimited number of tags.



BEST PRACTICES

Instead of having users enter their own tags for individual entities, set up tags in the Code Manager. (See “Adding drop-down entries.”) Then users can select from a drop-down containing only the 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 will be more useful company-wide.

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 the Code Manager to make them available for other similar entities.

Tag Manager

Using tags

Use tags to quickly print envelopes or labels or to send bulk emails to specific groups.

1. On the menu bar in MR8, click **Tools > Tags Manager**.
2. Select a **Type** in the drop-down.
3. If desired, enter an entity’s name in **Name**.
4. Select a **Tag Name** in the drop-down. All relevant tag names appear in the drop-down automatically including names entered manually in individual entities (see “Organizing with tags”).
5. Click **Search**. All entries that match the search criteria appear in the grid.
6. Select the desired entries in the grid by clicking their **Select** boxes. Or right-click on the grid and select **Check All**.



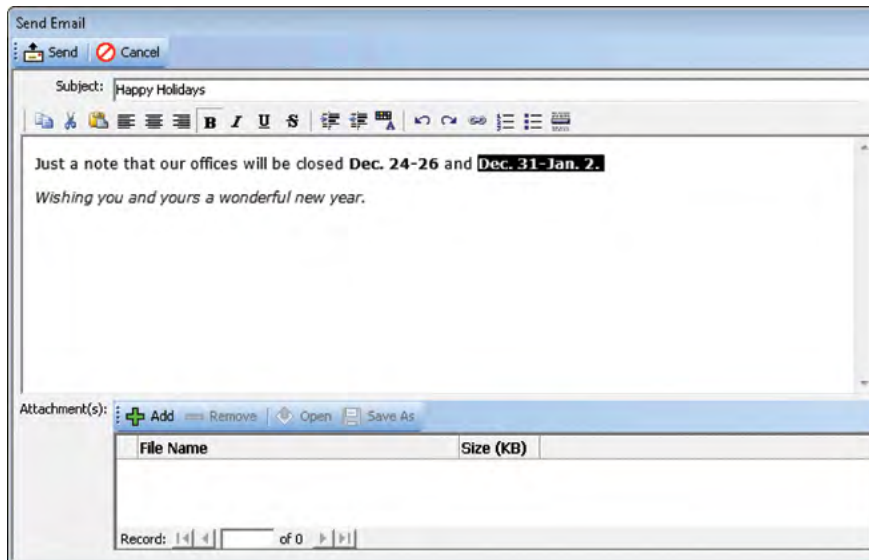
TIPS

When Contacts is selected in the **Type** drop-down, the **Firm Name** field appears in the search criteria.

To view an entry’s details, select it, then right-click on the grid and select **Firm**, **Contact** or **Location** depending on the type of entry. The entry’s detail screen appears.

7. Right-click again and choose:

- **Send Email** – In the Send Email window, enter text in the **Subject** and content fields. You can style the contents (such as adding bold or italic fonts or numbered/bulleted lists) by highlighting text and clicking the icons above the content field. Add attachments by clicking **Add** under Attachment(s), selecting the file(s) on your hard drive, then clicking **Open**. When you've finished composing the email, click **Send**.



- **Envelopes and Labels** – MR8's Envelopes and Labels window opens with the recipients grid already filled in. See "Printing envelopes and shipping labels."



TIP

To remove the tag from all of the selected entities at once, right-click on the grid, then choose **Remove Tag**.

Repository Access Log

Tracking inhouse and online repository access

Log and track all file download activities performed by the in-house staff as well as by the clients (via MR Web) as required by HIPPA rules.

1. On the menu bar in MR8, click **Tools > Repository Access Log**.
2. In the Search Criteria pane, enter search filters as needed, then click **Search**. All entries that match the search criteria appear in the grid.
3. To share the log with others, Click **Actions** (or right-click on the grid), then choose:
 - **Print Preview** – Choose **All Data** to print the entire grid, or **Selected Data** to print only highlighted data in the grid.
 - **Export** – To export the grid to *Microsoft Excel*.



IMPORTANT

To start the logging process, go to **Tools > System Preferences** and select the **Repository Server** tab, then check **Log internal usage of repository files**.

Integrator for QuickBooks

Importing invoices into QuickBooks

If you use *QuickBooks* as your in-house accounting system, you can import invoices that were generated in MR8 *directly* into *QuickBooks*. MR8's Integrator for QuickBooks streamlines the integration of MR8 data into *QuickBooks* by eliminating the cumbersome steps of exporting from MR8 and importing into *QuickBooks*.

There are several reasons to import your MR8 invoices into *QuickBooks*:

- If you operate multiple businesses and use *QuickBooks* to generate invoices for a business other than records retrieval (e.g., a staffing business), you can import MR8 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 MR8.
- You can reprint MR8 invoices in *QuickBooks* format, if needed.

You can also import MR8 contacts (as *QuickBooks* Customers), custodians (Vendors), payables (Checks), payments received (Receive Payments), and other transactions (as Credit/Journal Entries) into *QuickBooks*:

1. Launch your *QuickBooks* and have the right company file open.
2. On the menu bar in MR8, click **Tools > Integrator for QuickBooks**.
3. In the Search Criteria pane, specify the following filters:
 - **QuickBooks Data** – Select **Invoices** in the drop-down.
 - **Post Date From/To** – Enter an invoice post date range.
 - **Business Units** – Select business unit(s) in the drop-down. The default is ALL.
4. Click **Search** (or press **Alt + S**).
5. MR8 lists all of the invoices that match the search criteria. If you use *QuickBooks* Simple Start Edition, check the **Use QuickBooks Simple Start Edition** box.
6. Right-click on the grid, then choose **Check All** to select all of the invoices displayed.
7. Right-click on the grid again, then choose **Add to QuickBooks**.
8. As each invoice imports directly into *QuickBooks*, its corresponding **Select** checkbox clears.



NOTE

MR8 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.

Integrator for QuickBooks

Importing custodian payment checks into QuickBooks

Instead of printing custodian payment checks directly from MR8, have *QuickBooks* print them since reconciling your bank account can only be done in *QuickBooks*.

1. Launch your *QuickBooks* and have the right company file open.
2. On the menu bar in MR8, click **Tools > Integrator for QuickBooks**.
3. In the Search Criteria pane, specify the following filters:
 - **QuickBooks Data** – Select **Checks** in the drop-down.
 - **Pay Date From/To** – Enter a pay date range.
 - **Memo for Check** – Enter the common text that will appear in the Memo field on each check.
4. Click **Search** (or press **Alt + S**).
5. MR8 lists all of the locations being paid in the specified payroll along with their check amounts. If you use *QuickBooks* Simple Start Edition, check the **Use QuickBooks Simple Start Edition** box.
6. Right-click on the grid, then choose **Check All** to select all of the locations displayed.
7. Right-click on the grid, then choose **Add to QuickBooks**.
8. As each check imports directly into *QuickBooks*, its corresponding **Select** checkbox clears.



NOTE

MR8 automatically generates any missing data in *QuickBooks* (such as custodians/vendors) as checks are imported. You do not have to worry about importing all of the supporting data for checks one at a time.

Integrator for QuickBooks

Importing payments into QuickBooks

Instead of recording deposits manually in *QuickBooks*, you can import payment transactions directly from MR8 so that your bank deposits record will be accurate. However, you must 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. On the menu bar in MR8, click **Tools > Integrator for QuickBooks**.
3. In the Search Criteria pane, specify the following filters:
 - **QuickBooks Data** – Select **Receive Payments** in the drop-down.
 - **Post Date From/To** – Enter a payment post date range.
4. Click **Search** (or press **Alt + S**).
5. MR8 lists all of the payments that match the search criteria. If you use *QuickBooks* Simple Start Edition, check the **Use QuickBooks Simple Start Edition** box.
6. Right-click on the grid, then choose **Check All** to select all of the payments displayed.
7. Right-click on the grid, then choose **Add to QuickBooks**.
8. As each payment imports directly into *QuickBooks*, its corresponding **Select** checkbox clears.



WARNING

You must import invoices before you can import payments since payments are applied to invoices in *QuickBooks*. (See “Importing invoices into *QuickBooks*.”)

Appendices

This information includes a basic orientation to accounting principles, the recommended workflow for using MR8, and descriptions of what each MR8 report covers.

Concepts & information covered in these appendices:

Basic accounting

Records Retrieval workflow

Monthly reports



Appendix A | Accounting basics

Although MR8 is not a general accounting system, having some basic accounting knowledge will help you to understand its reports and business workflows.

Accounting Basics

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

Accounting Basics

The accounting equation

The resources controlled by a business are referred as its assets. 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:

$$\begin{array}{l} \mathbf{Assets} \quad = \quad \mathbf{Liabilities + Owners' Equity} \\ \textit{Resources} \quad \quad \quad \textit{Claims on the Resources} \end{array}$$

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*.

Accounting Basics

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.

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	Revenue
500.00 (increase)	500.00 (increase)

Payment (cash receipt)

When a payment is received, Cash (asset) increases and Accounts Receivable (asset) decreases.

Cash	A/R
500.00 (increase)	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	Discount
500.00 (decrease)	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	A/R
500.00 (decrease)	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	Revenue
500.00 (decrease)	500.00 (decrease)

Write-off

If an invoice is written off, Accounts Receivable (asset) decreases and Bad Debt (expense) increases.

A/R	Bad Debt
500.00 (decrease)	500.00 (increase)

Duplicate Payment

When a duplicate payment is received, Cash (asset) and Refund (liability) increase.

Cash	Refund
500.00 (increase)	500.00 (increase)

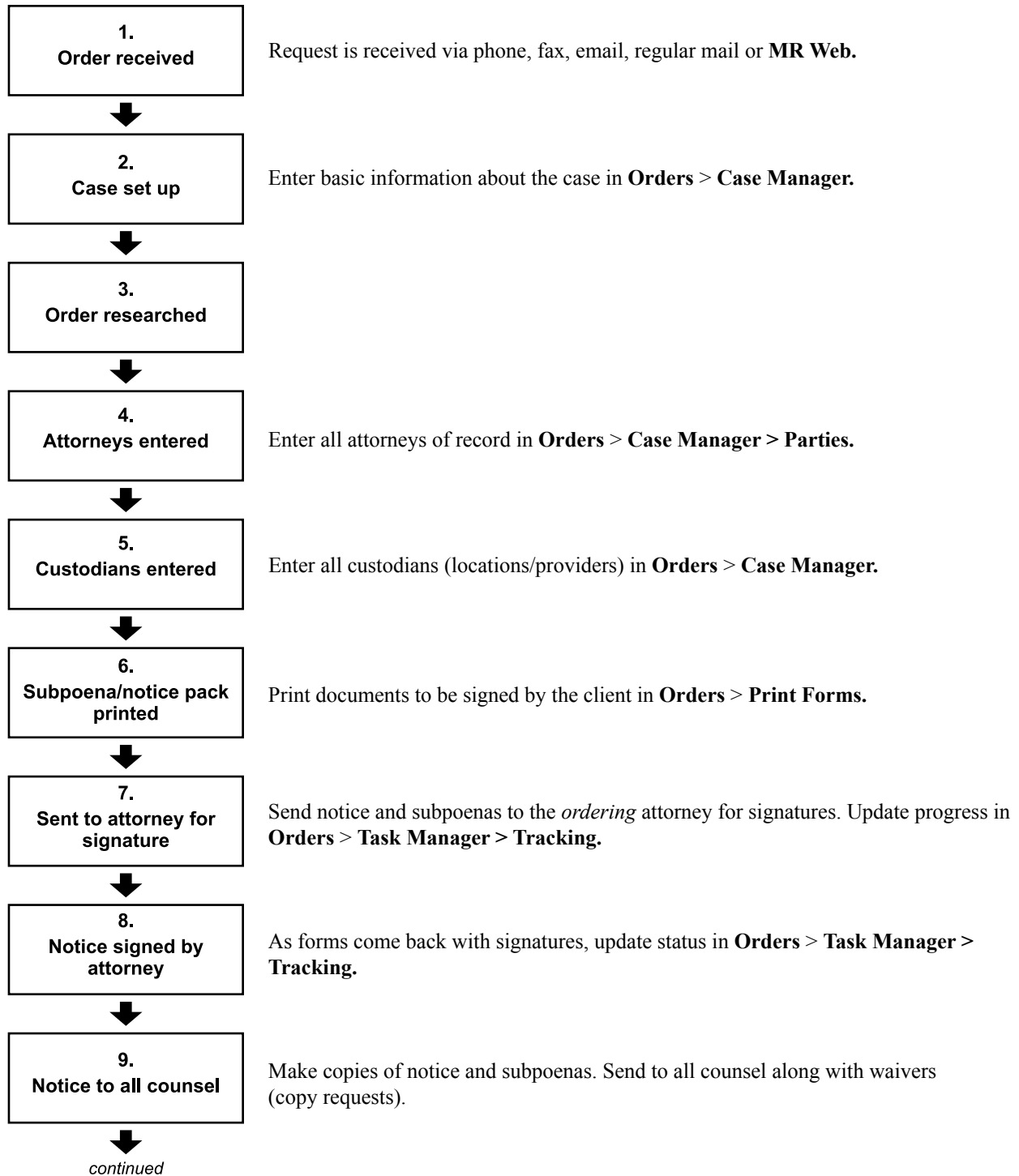
Refund

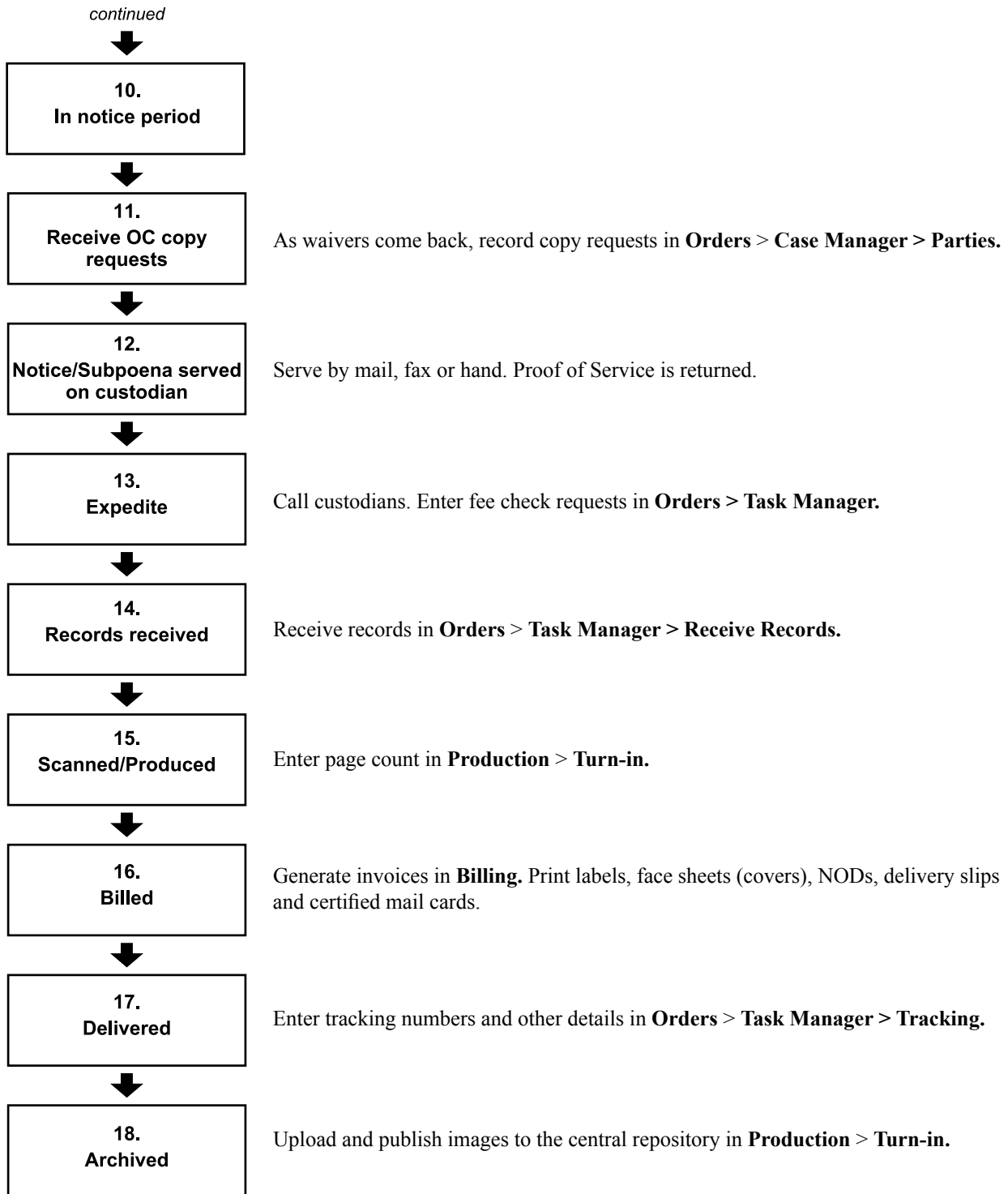
When a refund check is issued, Cash (asset) and Refund (liability) decrease.

Cash	Refund
500.00 (decrease)	500.00 (decrease)

Appendix B | Record Retrieval workflow

Recommended procedure for using MR8 in retrieving records.





Appendix C | MR8's monthly reports at a glance

MR8 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 MR8 reports into business-related areas.

Collection-related reports

Report	Location	Description
Statements	Receivables > Monthly Reports	Summarizes each client's overdue invoices. Each attorney receives a separate statement unless the firm has been set up to consolidate.
Aged A/R	Receivables > Monthly Reports	Summarizes each client's unpaid invoices, grouped by when the invoice was due (aging period). This report can be sorted either by name or amount.
Open Invoices	Receivables > Monthly Reports > Statements	Reprints all unpaid invoices to accompany statements. Invoices show payments, credits, finance charges and current balance.
Collection Forecast	Receivables > Collections	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 > Monthly Reports	A summary recap of daily registers. Your accountant uses this report to prepare your company's financials.
Invoices	Reports > Financial	Lists all invoices generated for the specified period. This report can be sorted by invoice number, order number or firm name.
Paid Invoices	Receivables > Monthly Reports	Lists all invoices paid within the specified period, grouped and sorted by the payment date.
Voided Invoices	Receivables > Monthly Reports	Lists all invoices voided within the specified period, grouped and sorted by the void date.
Insurance Billing	Reports > Client	Lists all invoices billed directly to an insurance company (or other third party), grouped and subtotaled by client and insurance company.
Miscellaneous Sales	Reports > Financial	Summarizes each invoice (containing the specified service items), grouped and subtotaled by client.
Business Analysis	Reports > Financial	Provides an instant snapshot of your business, with the sales amount and units shown for different periods for comparison.

Client-related reports

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

Staff-related reports

Report	Location	Description
Sales Commission	Payables	Lists all invoices that include a commission, grouped and subtotaled by sales rep (account executive). Commissions are automatically generated from invoices on orders initiated by a sales rep's client.
Processor Production	Reports > Other	Lists all invoices generated for the specified period, grouped and subtotaled by processor or client rep.

Tax-related report

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

Fee Check-related reports

Report	Location	Description
Check Reconciliation	Payables > Check Reconciliation Report	Use this report to monitor your custodian fee spending closely. Find all of the work orders that have not been billed yet, even though the custodian fees have been spent already. Also find all of the work orders that have been under billed or unpaid.
Bank Reconciliation	Payables > Bank Reconciliation > Bank Reconciliation Report	Lists all custodian fee checks cleared (or not cleared) for the specified period. You must perform the Import Check Reconciliation Data function before you can run this report.

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