



Online case repositories & more for your clients

Add RB Connect to your office to give clients & reporters easy online access to your office

RB Connect works for:

Lawyers
Secretaries
Paralegals
Insurers
Court reporters
Videographers
Interpreters
Scopists
Proofreaders

RB Connect is the new version of the online repository and calendar your clients ask for by name: RB Web. This essential RB plug-in gives clients, reporters, and others online access to essential information in your office, like schedules, job locations, transcripts and other case files, and billing information.

Your clients can also schedule jobs with you, pay invoices, and work with interactive transcripts. Your reporters and other resources can turn in jobs online and request time off.

Since it is browser based, your clients and resources do not have to install anything on their computers or laptops to access your RB Connect. All they need is your RB Connect URL.

RB Connect offers:

Online case repositories. Give clients online access to files. Win new clients by offering them the same service during pre-discovery. Reporters can download shared files, such as exhibits.

E-commerce. Clients can pay invoices, including CODs, online. Copy clients can pay online, then download transcripts.

Transcript Packages. Users can view, highlight, and make notes on transcripts, plus view linked exhibits, video, and other files. They can export transcripts in a variety of formats.

Multi-browser/platform compatibility. Users can access your RB Connect through almost any browser and on any operating system.

Secure sign-in. You can require users to periodically update their password and enter a code along with their ID and password before accessing the site.

Customizable lists, contents & appearance. Choose which functions users have access to. Set up lists of services clients and resources can select from. Change site content and look to match your company website. Customize automated emails clients and resources receive.

Driving directions to locations. Clients and resources can get directions to a job's location while on the road using either Google, Mapquest, or Bing maps.

Optional plug-in for



Reporterbase
Business
Management
Systems

Benefits

Information available instantly anytime. No more telephone tag.

Information is always up to date because it comes directly from your RB9.

Less expensive to download information as needed instead of dealing with hard copies & delivery.

Major features for all users

Information is secure. Users sign in with their user ID and password.

Two-factor authentication (2FA) option makes log-in more secure by adding a second factor, such as a code sent to their phone.

Users can change their user ID and/or password. And you can offer social media sign-in so they don't need another password.

Users can set screen to light text on dark background.

Upon sign-in, users can see current information at a glance, and access top functions directly from their dashboard.

Users can look up upcoming or previous jobs, and view any job's details, including map directions.

Help and support where needed. Users can look up info in the contextual user guide or contact you via support tickets and track the resolution of their issues.

Major features for lawyers/secretaries/paralegals

Your contacts can:

View and access upcoming jobs, recently uploaded files, and total payables in their dashboard.

Check their schedule, and see at a glance the status of all jobs, including those that are canceled.

Upload notices.

Request jobs, either by copying and updating jobs or from scratch. Specify services to include.

Reschedule or cancel jobs.

Look up jobs using search criteria, such as witness or who placed an order, to limit results.

View any job's details, including driving directions and Zoom info.

View, search, highlight, and comment on transcripts designed to work in browsers and on smartphones and tablets.

Export transcripts as AMICUS, condensed or full-size PDF (including PDF/A), word index or word list, highlights, and notes.

Search their transcripts and case files by case name or number and other search criteria.

View and download job and case files, including streaming video.

View and download other files you maintain for them, such as price lists and contracts.

Back order transcripts.

Look up outstanding and paid invoices, and view invoice details.

Pay invoices. If you email invoices, they can click a link in the email to pay online. COD clients can download transcripts after paying online.

Use search criteria, such as case name, invoice date, and open

Top features for your clients

Their transcripts, including interactive transcript packages

Case file repository

Detailed job info, including map directions

Invoices with payment history and current outstanding amounts

Pay online

or paid invoices, to limit which listings are displayed and/or find a specific invoice.

If you offer reward points, can see their current points balance, pending amounts and history, and redeem or transfer points.

Update their contact information, and set personal preferences.

Major features for reporters/videographers/interpreters

Your resources can:

View and access upcoming jobs, overdue tasks, and total receivables in their dashboard.

Check their schedule. If they are a sales rep or have their own clients, they can also see which jobs their clients have scheduled. Add jobs to their outside calendar.

See at a glance the status of all jobs, including canceled jobs.

Print out assignment notices. Acknowledge new jobs.

Look up jobs using search criteria, such as firm or scheduled date, to limit results.

View any listing's details, including driving directions or special notes about the job's firm or contact.

Check in at job locations.

Update the status of tasks.

Turn in jobs and upload files.

When uploading exhibits, resources can select stamps to

use for automatically numbering PDF exhibits.

See which jobs have been invoiced and what they are owed.

Look up invoices for a particular case, job date or witness.

Find out what their next paycheck will include.

View any invoice's pay details.

View and download current and past pay statements.

Choose to see pay statements with invoice details or not.

Check their To-Do list.

View and download job files, including shared case files such as word lists, dictionaries, and exhibits.

Compile master word lists.

Search their job files by case name, job date range, job number and other search criteria.

View other files you maintain for them, such as contracts.

Top features for your resources

One-touch job acknowledgements

Detailed job info, including map directions

Shared case files

Turn in jobs

Pay statements & outstanding amounts owed to them

View their work schedule and request time off.

Look up information about clients, including phone numbers and map directions.

Ask questions and track the resolution of their issues with the support ticket system.

Look up information in the contextual User Guide.

Update their contact information.

Set personal preferences.

Pricing

\$220/month*

RB Connect is available by subscription. Payable by automatic credit card payments only. Terms are month-to-month; cancel anytime with no further obligation.

**per RB9 installation, no limit on the number of users.*

Ready to open your online offices?

If you have RB9 set up and working, you are ready to add RB Connect. (*RB Connect does not work with RB Lite.*) RB9 and RB Connect reside in the cloud, so you do not need any hardware or software except a computer, laptop, or mobile device connected to the Internet through one of the major browsers.

All anyone needs to access your RB Connect site is a computer, laptop, or mobile device with Internet access through a browser, and your RB Connect URL, which is similar to your RB9 URL. It will have the same base name, but end in ".contact" for your clients and ".resource" for your resources.

Extend your RB Connect services

You can add more options to your online offices with RB Connect plug-ins. Like RB Connect, these plug-ins are available on a monthly basis, and you can cancel them at anytime with no further obligation.

Meet your clients where they live

Add the **RB Connect Mobile** plug-in and meet your clients where they live: On their smart phones. RB Connect Mobile re-organizes your RB Connect online offices into a mobile-optimized layout so users can work with their information on the smaller screens of iPhones and other mobile devices.

RB Connect Mobile redesigns RB Connect online offices to follow the standards of mobile user interfaces. So users can scroll and tap to find information instead of pinching and zooming the scaled-down RB Connect interface.

Your clients can do everything they do in RB Connect in RB Connect Mobile except upload files and pay invoices. Your reporters and other resources can do everything they do in RB Connect except turn in jobs and create master word lists.

RB Connect Mobile is not an app, so your clients and resources do not have to search through app stores to find it, nor do you have to deal with registering your mobile offices. Instead, users access it through the browser on their smartphones and tablets. It uses the same URL as your RB Connect online offices, and knows automatically when the user is on a mobile device so it displays properly.

Give clients text-searchable repositories

Add the **Full-Text Search** plug-in to RB Connect, which gives your clients the ability to search for specific text in their RB Connect

Related products

RB9 business management system for court reporting agencies, videographer, interpreting services, or other legal support business

RB Connect Mobile plug-in to RB Connect for accessing RB Connect on mobile devices

Full-Text Search plug-in to RB Connect for creating searchable files in RB Connect & RB Connect Mobile

For more information about RB9 business management software, RB Connect online offices, and other plug-ins, visit omti.com or contact OMTI Sales.

repositories and get results in seconds. Text searches can be run on a variety of file types including PDFs, Word docs, ASCII, Excel, PowerPoint, HTML, and all other text file types.

For more information about RB9 business management software, RB Connect online offices, and RB Connect Mobile, visit omti.com/rb or contact OMTI Sales.



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