Your RB Connect branding checklist

Use this interactive list to check off all your custom branding in RB Connect. (This list comes from Idea Salad.)

Required & recommended branding basics

Find these options in RB9's Connect module under Connect Preferences > Branding.

- [ ] Edit the text that identifies your RB Connect on the tab at the top of browser windows.
- [ ] Add your logo to the welcome screen.
- [ ] Use your company colors for the text and background on the welcome screen. (If they are hard to read together, substitute black or white for one of the colors.)
- [ ] Edit the text that will appear on welcome screens. Use the same or different text for contacts and resources. Style the text with font sizes, type faces, colors, indents, etc. You can even add hyperlinks to your company site and images.
- [ ] Add a title/headline that will appear above the login fields on your contact welcome page. Use the same or a different one for the resource welcome page.
- [ ] Customize the look of interior pages of your RB Connect. Brand them with your company logo at the top of each page and company colors in menus, page headers, and section headers.
- [ ] If you have RB Connect Mobile, you can also use your own logo for what appears on a user's phone when they select the option to save the web page to their home screen.

Emails+ branding

These options are in the Connect Preferences function.

- [ ] **Invitation Letters:** Send different emails to contacts and resources to give them targeted information for using your RB Connect.
- [ ] **Forgot Password** emails for contacts and resources can have the same or different content.
- [ ] **Announcements** panel for both the Contact and Resource sides (Contact-Announcements and Resource-Announcements). In addition to the basic branding, you can add news about your company, explain your services, and change the content periodically to catch the user's eye.
- [ ] **Support Ticket Notification** emails to contacts and resources can have the same or different content (Contact-Support Tickets and Resource-Support Tickets).
- [ ] **New Job Notification** emails to contacts (Contact-Calendar).
- [ ] **Request Job Confirmation** emails to contacts (Contact-Calendar).
- [ ] **Request Cancel Job Notification** emails to contacts (Contact-Calendar).

- [ ] **Payment Receipt** emails (Contact-Account Activity).
- [ ] **Transcript Package Notification** emails (Contact-Transcript Packages).
- [ ] **File Upload Notification** emails for Case/Job/Witness/Invoice-level repositories (Contact-Repository).
- [ ] **Time Off Approval/Denial Notification** emails (Resource-Availability).

Forms+ branding

These forms are attached to RB Connect emails. Add branding to these forms in Tools > Form Templates.

- [ ] **Job Confirmations**
- [ ] **Job Cancellations**
- [ ] **Assignment Notifications**
- [ ] **Assignment Cancellations**
- [ ] **Payment Receipts**

Notes Templates are boilerplate text that is inserted into forms and other fields in RB. Add branding to these templates in Tools > Notes Templates and include the related data fields in the forms.

- [ ] **Case Remarks:** Text appears on Assignment Notification worksheets if the Case > Remarks data field is added in Form Templates.
- [ ] **Job Confirmation Notes:** Text appears on Job Confirmation emails and Assignment Notification worksheets if the Job > ConfirmationNotes field is added in Form Templates.
- [ ] **Job Production/Billing Notes:** Text appears on Assignment Notification worksheets if the Job > ProductionBillingNotes field is added in Form Templates.
- [ ] **Resource Notification Notes:** Text appears on Assignment Notification worksheets if the Job > ResourceNotificationNotes field is added in Form Templates.