

# SMALL PRACTICE EDITION (SPE)

Comprehensive legal software for the smaller practice (up to 2 users)

Whether you are a small practice or a sole practitioner you still want software that meets all the known standards as required by the SRA, Law Society and LSC. Partner for Windows Small Practice Edition (SPE) has everything that a law firm needs to maintain effective financial, time and matter management control. It is sophisticated, fully-functional and easy to use. Structured around a single database information is entered, accessed and managed with speed and ease.



## LEGAL ACCOUNTING

Partner for Windows Accounting Partner has everything that a law firm requires to maintain effective financial control. Accounting Partner is a sophisticated, feature-rich, yet easy to use financial accounting system that has been developed to meet all the known standards as required by such as the SRA, the Law Society and the LSC<sup>1</sup>

## FEATURES

- Integrated client, nominal and purchase ledgers<sup>2</sup>
- Ability to forward post without having to close off periods
- Money laundering functions which can be customised to your requirements - includes monitoring and reporting
- Posting to consolidated batches
- Automatic production of statement and remittance slips
- Credit Control
- Cheque printing – both single and batched

## ABOUT PARTNER FOR WINDOWS

Partner for Windows is a comprehensive practice and case management system including accounting, case and document management, time recording and billing which together form a complete system to meet the back and front office requirements of a modern legal practice.

The extensive functionality of Partner for Windows can further be enhanced using a range of specialist third party solutions designed to address key business issues for the legal profession. Each of these solutions is seamlessly integrated into Partner for Windows to ensure that the single practice and case management database remains at the core of the system.

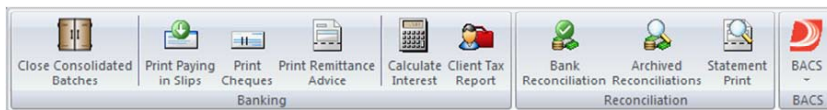
## CONTACT

**Sales:** 01489 609010  
**Email:** [tfb@tikitt.com](mailto:tfb@tikitt.com)  
**Web:** [www.tikittfb.com](http://www.tikittfb.com)

**Postal Address:**  
 1590 Parkway  
 Solent Business Park  
 Fareham  
 Hampshire  
 PO15 7AG

## A PARTNER FOR WINDOWS FACT SHEET

- Client Interest calculation
- Wide-ranging standard reports together with the ability to customise and write user-defined reports
- Integrates with MS Excel for budgets and Management Reporting
- Comprehensively covers all current LSC contracts including bulk upload of claims and reconciliation of SMP (both CDS and civil) together with all other non-standard CDS, Crown Court (LGFS and AGF) as well as both civil and criminal VHCC/CCU work<sup>1</sup>
- Choice of manual or automated bank reconciliation with online bank reconciliation facilities suited to most major banks



Banking Menu



Posting Menu

### Notes:

- 1 When used in conjunction with the optional LSC Public Funding module.
- 2 When used in conjunction with the optional Purchase Ledger module.

## DESKTOP ENVIRONMENT

The desktop functionality of Partner for Windows is incorporated into the Accounting Partner licence, providing clear and intuitive desktop functions. All users are able to view the ledgers associated with clients and matters as well as time record, make direct requisitions, e.g. for disbursement cheques or monies on account receipts and draft bills.

## FEATURES

- Quick and easy creation of all client and matter types (with appropriate screens for each) allowing work to begin without delay
- Automated duplicate and conflict checking, customised to the firm's requirements
- Access to all ledger cards via appropriately placed icons
- Mandatory fields can be set at both client and matter level
- Limits can be set at both client (credit) and matter (time, financial and credit) level
- Electronic requisitions to Cashiers are easy to access and use
- Sources of Introduction and hierarchical referrals can be set at both client and matter level
- Live time recording in a variety of forms including manual, stopwatch, silent (available with case management) and memo time recording
- Flexible billing systems to meet your needs, including:
  - The Billing Wizard system which is a comprehensive step-by-step billing process for Fee Earners

## ABOUT TIKITTFB

With more than 30 years of dedication to the legal profession, TikitTFB supports over 600 legal practices throughout the UK with managing risk, ensuring compliance and enhancing profitability using our award-winning Partner for Windows Practice and Case Management system.

Partner for Windows uses industry standard Microsoft technology, enabling the software to be smoothly integrated into existing infrastructures. Catering for firms of all shapes and sizes, Partner for Windows provides a flexible and comprehensive solution which can be readily tailored to meet the needs of practices now and in the future.

Part of the Tikit Group, provider of IT services and software to 90% of the UK's top 100 law firms, TikitTFB is well positioned to make magic circle technology accessible and affordable to large regional and high street firms.

## CONTACT

**Sales:** 01489 609010

**Email:** [tfb@tikittfb.com](mailto:tfb@tikittfb.com)

**Web:** [www.tikittfb.com](http://www.tikittfb.com)

### Postal Address:

1590 Parkway  
Solent Business Park  
Fareham  
Hampshire  
PO15 7AG

## A PARTNER FOR WINDOWS FACT SHEET

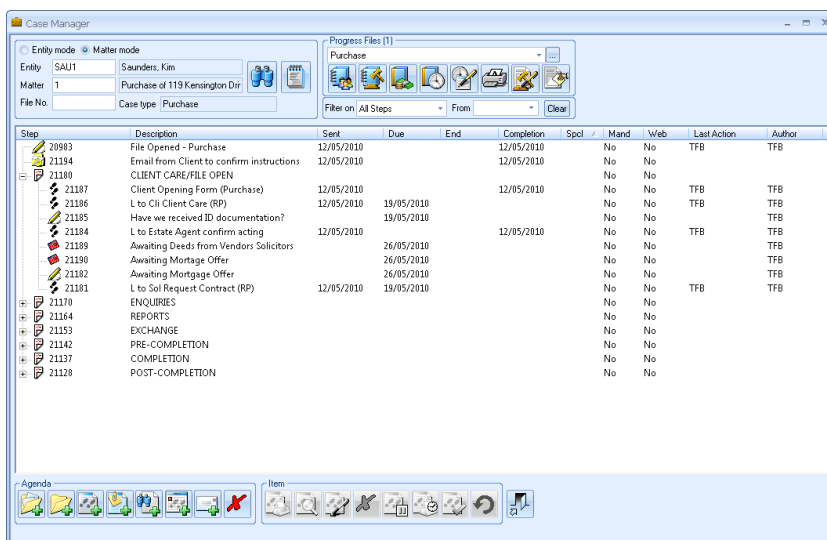
- Quick Bill system which is designed where no decisions are required but can be customised to accord with your standards (available with case management)
- Ability to bill multiple matters together for a client, yet account for them separately against each matter for your records
- Can bill to third parties easily – with full record for credit control
- Covers all current LSC contracts, including all set-up (matter type codes etc.) compliance with limits and gives appropriate and timely warnings with an intuitive comprehensive billing and reconciliation system ensuring quick turn-around of claims

## CASE MANAGEMENT

Modern law firms require data/information, document and matter management all in one. This is Partner for Windows Case Manager. Case Manager is a simple to use yet powerful document and matter management tool which enables firms to deliver services with greater efficiency.

## FEATURES

- Simple to use yet powerful document and matter management tool
- Use your existing template/precedent letters and documents – we help you re-code for this system
- All steps in the work flow and documents produced are automatically saved against the correct client and matter
- All diary dates and tasks are stored both in Partner for Windows and MS Outlook and can be accessed from both (or GroupWise, if preferred)
- Send emails directly from Case Manager and easily move one or many emails (with attachments separated) from your inbox to any case so they are stored with the matter
- Access matter-related websites from Case Manager and auto populate them with matter data where appropriate e.g. NLIS SearchFlow
- Easily compare documents in Case Manager using MS Word, DocsCorp or DeltaView comparison software
- Time can be automatically recorded when certain documents and forms are generated



Step	Description	Sent	Due	End	Completion	Spcl	Mand	Web	Last Action	Author
20983	File Opened - Purchase	12/05/2010			12/05/2010	No	No		TFB	TFB
21194	Email from Client to confirm instructions	12/05/2010			12/05/2010	No	No		TFB	TFB
21180	CLIENT CARE/FILE OPEN					No	No			
21187	Client Opening Form (Purchase)	12/05/2010			12/05/2010	No	No		TFB	TFB
21186	L to Cli Client Care (RP)	12/05/2010	19/05/2010			No	No		TFB	TFB
21185	Have we received ID documentation?		19/05/2010			No	No		TFB	TFB
21184	L to Estate Agent confirm acting	12/05/2010			12/05/2010	No	No		TFB	TFB
21183	Awaiting Deeds from Vendors Solicitors?		26/05/2010			No	No		TFB	TFB
21190	Awaiting Mortgage Offer		26/05/2010			No	No		TFB	TFB
21182	Awaiting Mortgage Offer		26/05/2010			No	No		TFB	TFB
21181	L to Sol Request Contract (RP)	12/05/2010	19/05/2010			No	No		TFB	TFB
21170	ENQUIRIES					No	No			
21164	REPORTS					No	No			
21153	EXCHANGE					No	No			
21142	PRE-COMPLETION					No	No			
21137	COMPLETION					No	No			
21128	POST-COMPLETION					No	No			

Typical case flow screen in Case Manager

## ABOUT TIKITTFB

With more than 30 years of dedication to the legal profession, TikitTFB supports over 600 legal practices throughout the UK with managing risk, ensuring compliance and enhancing profitability using our award-winning Partner for Windows Practice and Case Management system.

Partner for Windows uses industry standard Microsoft technology, enabling the software to be smoothly integrated into existing infrastructures. Catering for firms of all shapes and sizes, Partner for Windows provides a flexible and comprehensive solution which can be readily tailored to meet the needs of practices now and in the future.

Part of the Tikit Group, provider of IT services and software to 90% of the UK's top 100 law firms, TikitTFB is well positioned to make magic circle technology accessible and affordable to large regional and high street firms.

## CONTACT

**Sales:** 01489 609010

**Email:** [tfb@tikit.com](mailto:tfb@tikit.com)

**Web:** [www.tikittfb.com](http://www.tikittfb.com)

### Postal Address:

1590 Parkway  
Solent Business Park  
Fareham  
Hampshire  
PO15 7AG

## A PARTNER FOR WINDOWS FACT SHEET

- Set milestones and mandatory steps as required
- Set automated actions to occur when due
- Document assembly facilities where required, e.g. different clauses for different circumstances
- Document versioning, with a history for each version, and the facility to compare any two versions at once
- SMS text messaging facility (available as an option)
- Single source of information at client and matter level
- Full text searching, using MS Search Server
- Privilege levels for user types can be set and maintained
- Lock-down security at both client and matter level
- Direct access to web sites relating to the case, e.g. HM Land Registry or LSC etc.

## COMPREHENSIVE LSC FUNCTIONALITY

Practices that have any type of Legal Aid contract will understand the need to have software that is fully compliant and up-to-date with the LSC regulations. It also needs to take care of the complex administrative processes and be easy to use for all staff. With Partner for Windows Legal Aid firms can capture every minute that can be claimed, at the appropriate rate for the case at that time, and increase profitability by simplifying business processes.

## ABOUT TIKITTFB

With more than 30 years of dedication to the legal profession, TikitTFB supports over 600 legal practices throughout the UK with managing risk, ensuring compliance and enhancing profitability using our award-winning Partner for Windows Practice and Case Management system.

Partner for Windows uses industry standard Microsoft technology, enabling the software to be smoothly integrated into existing infrastructures. Catering for firms of all shapes and sizes, Partner for Windows provides a flexible and comprehensive solution which can be readily tailored to meet the needs of practices now and in the future.

Part of the Tikit Group, provider of IT services and software to 90% of the UK's top 100 law firms, TikitTFB is well positioned to make magic circle technology accessible and affordable to large regional and high street firms.

### OTHER SOLUTIONS THAT INTEGRATE WITH PARTNER FOR WINDOWS SMALL PRACTICE EDITION ARE:

**Postroom Partner** for document scanning and allocation  
**PartnerMail** for email management  
**URU** for online identity verification  
**Crystal Reports** for data mining and report development  
**Management Reporting** consultancy/services

### CONTACT

**Sales:** 01489 609010  
**Email:** [tfb@tikittfb.com](mailto:tfb@tikittfb.com)  
**Web:** [www.tikittfb.com](http://www.tikittfb.com)

**Postal Address:**  
1590 Parkway  
Solent Business Park  
Fareham  
Hampshire  
PO15 7AG