

CASE FLOW AUTOMATION

Use Partner for Windows Step Automation Manager (SAM) to automate any case flow

Firms that are bulk processing some types of work (e.g. re-mortgage or debt collection) have a requirement to automatically take or complete certain case steps in order to make the whole process much more efficient and therefore reduce the costs of processing repetitive work. Other practices often find that some sections of their case flows could usefully be dealt with 'in bulk' when many of the cases reach the same stage at a similar time.

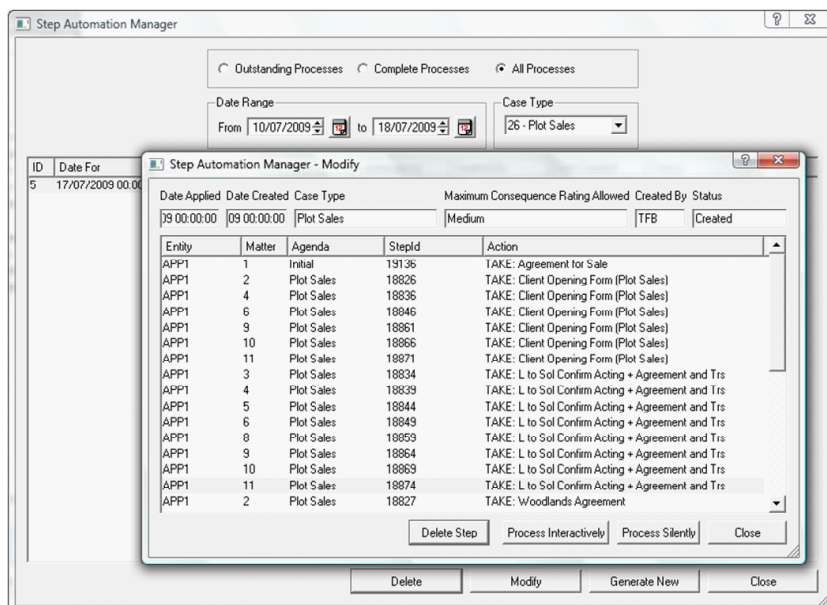
Partner for Windows Step Automation Manager will allow firms to automatically take or complete flagged case management steps, in bulk, and without having to enter each of the individual case flows.

It is a case processing tool which has been specifically designed to automate the production of routine letters and documents, without user intervention, across multiple matters and case types. It uses your existing case templates – you just need to enable the Step Automation Manager actions.

ABOUT PARTNER FOR WINDOWS

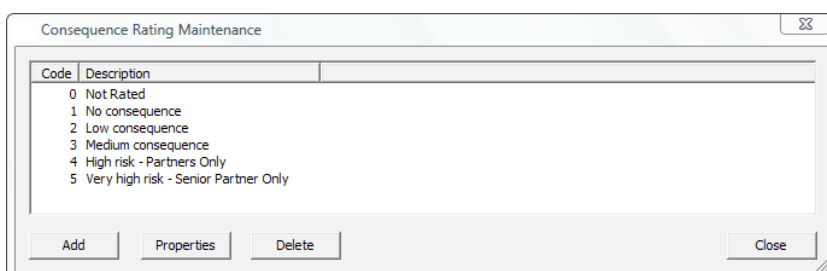
Partner for Windows is a comprehensive practice and case management system including accounting, case and document management, time recording and billing which together form a complete system to meet the back and front office requirements of a modern legal practice.

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.



Optimise your case flows with Step Automation Manager

As it is possible to run a Step Automation Manager process via a command line, it follows that it can even be scheduled to run at a time convenient for the firm, e.g. overnight, thus optimising the use of your server.



Define consequence ratings for each step in the case flow

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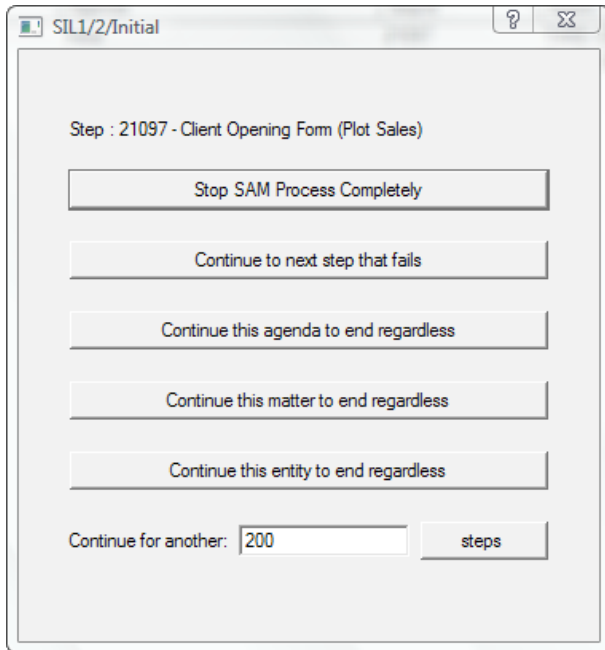
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A PARTNER FOR WINDOWS FACT SHEET

It can also be run manually or automatically. When in manual mode, Step Automation Manager can be processed interactively with prompts to the user, or silently.



Option available during a manual interactive process

Step Automation Manager can help:

- Enhance ability to **streamline business processes** maximising your firms earning capabilities
- **Reduce time** spent on individual cases allowing your firm to take on bulk work
- **Improve productivity and efficiency** in handling cases across your firm
- **Enhance client relations** through better management of cases
- **Reduce risk of human error** by automating the processing of cases set to predetermined parameters

OTHER SOLUTIONS THAT INTEGRATE WITH PARTNER FOR WINDOWS STEP AUTOMATION MANAGER ARE:

Automated Archive Manager/Extended Archive Manager for matter archiving

Partner TaskCentre for business process management

Management Reporting consultancy/services

Crystal Reports for data mining and report development

URU for online identity verification

Digital Dashboard for business intelligence

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.

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