

# Workflow- foundations



# Workflow- foundations



## Awaiting Items

- Track all Documents out / Documents In
- Auto chase items by batch email
- Clear view of awaiting status
- Assign as precedents to steps requiring certain items to be received
- Integrate with Scanning solution
- Allow Ad-Hoc Awaiting Items
- Link to Milestones

# Workflow- foundations



## Data Forms

- Logical clear form layouts
- Direct user to certain tabs during workflow
- Use of Iron Python (code) where Managing Partner forms lack functionality

# Workflow- foundations



## Financial Structure

- Row based Financial Entry structure
- VAT options
- Default fees / apply options
- Fee scale by Introducer
- Imported from External source
- Allow ad hoc fees

# Workflow- foundations



## Financial Statements

- Auto completion statements
- Auto fees Client Care Letter
- Potential for Auto Bill

# Workflow- foundations



## Data Import

- Import client and case details
- Auto list new cases in the prospect register
- Auto create matter
- Perfect Portal – two way

# Workflow- foundations



## Scanning Solution

- Scanning to Buckets
- EDT Scan Processing
- Auto email to fee earner
- Auto insert into Matter Inbox agenda
- Optional Narrative
- Optional Select Awaiting Item
- Auto set Awaiting Item as received, preventing chase
- Include Client Ref in top right of all forms for OCR



# Workflow- foundations



## Auto Stationary

- Branch Level
- No pre-printed stationary required
- Every letter auto inserts stationary
- Auto Header, Footer graphics
- Auto Top Lines – client address salutation
- Auto letter titles, depending on contact type
- Auto Bottom Lines – fee earner details, generic signature



# Workflow- foundations



## Auto Form filling

- Pre populate Laser/Oyez forms
- Built in SQL functions to handle form needs

# Workflow- foundations



## Reporting

- Excel Database Tasks (EDT) Reports
- Data drill down
- Real time data
- Export to any format
- Parameter driven
- Active directory integrated

# Workflow- foundations



## Training

- We all forget!
- Step by step instructions
- [Online](#)

# Workflow- foundations



## Collaboration

- New Software always has glitches
- Ideas, business knowledge pooled
- [Help Desk](#) – feedback, things get fixed or further developed