

CASE AND DOCUMENT MANAGEMENT

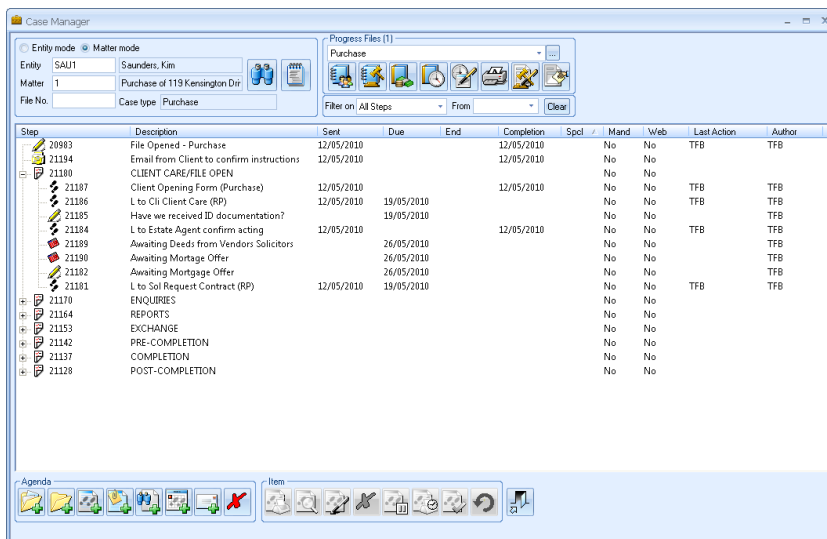
Use Partner for Windows Case Manager for all case requirements from a simple note or due date to full case flow

These days law firms require data/information, document and matter management all in one. This is Case Manager, which is part of the Partner for Windows practice and case management system. Case Manager is a simple to use yet powerful document and matter management tool which enables firms to deliver services with greater efficiency. Everything has been written with the user in mind.

The Partner for Windows Case Management system is uncomplicated, yet functionally rich and can be implemented practice-wide, no matter what the legal discipline. It uses familiar Microsoft applications, e.g. Word - for documents, Outlook - for email (in and out of the case), tasks and appointments, Excel - for spreadsheets etc., all without the user having to open and close these applications.

In addition, it uses SMS text messaging, PDF documents, Crystal reports and Oyez Legal forms, together with the ability to drag and drop most file types into the case flow – you can even store the digital dictation file in there if you wish. In essence, the paper file can be replicated which means that everything is available electronically: whether to email out of the case, to collate into a court or brief bundle or to upload to a client-accessible page of your website. Case Manager can be implemented for all case/work types at matter level as well as for any use at client level, e.g. marketing and credit control.

Here is a typical work flow screen from within Case Manager:



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			
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 Clt 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
21184	L to Estate Agent confirm acting	12/05/2010		12/05/2010		No	No	TFB		TFB
21189	Awaiting Deeds from Vendors Solicitors		26/05/2010			No	No			TFB
21190	Awaiting Mortgage Offer		26/05/2010			No	No			TFB
21182	Awaiting Mortgage Offer		26/05/2010			No	No			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			

Note that the user has access not only to the work flow but also, via the icons on the screen:

- The financial and time ledgers
- Time recording
- Client information
- All the contacts and data relating to that matter

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@tikittfb.com
Web: www.tikittfb.com

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

A PARTNER FOR WINDOWS FACT SHEET

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 Microsoft 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 Microsoft Word, DocsCorp or DeltaView comparison software
- Time can be automatically recorded when certain documents and forms are generated
- 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
- Single source of information at client and matter level
- Full text searching, using Microsoft 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.

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 CASE MANAGER ARE:

Accounting Partner for legal accounts and desktop environment
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

CONTACT

Sales: 01489 609010
Email: tfb@tikit.com
Web: www.tikittfb.com

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