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An article from Software Technology, Inc.

WorkFlows

PracticeMaster Premier boasts a WorkFlows feature that offers today's busy law firms a way to get things done more quickly and make sure that important steps are not missed. For example, a WorkFlow can respond to activity in PracticeMaster by automatically adding an appointment, sending an e-mail, assembling a new document, displaying a warning message, and much more!

With the Tabs3 and PracticeMaster Trial CD, you can explore WorkFlows using the sample data. To see basic examples of how WorkFlows can help you stay on top of your practice, take a look at the following sample WorkFlows. The six WorkFlows included in this document are included with the PracticeMaster software provided on the Tabs3 and PracticeMaster Trial CD, allowing you to run and modify them as desired.

Sample 1: Client File

Email ADMIN on Critical Field Changes

This WorkFlow assumes a Client Name, Work Description, and Location will be defined for each new client. These fields rarely change after a client is entered, so if one of these fields is modified after a client is saved, this WorkFlow will e-mail the firm administrator.

As a modification to this WorkFlow, you could add a second action to display a message that alerts the user of the critical field change and asks whether that change was intentional.

Sample 2: Client File

Schedule Initial Case Assessment

This WorkFlow assumes when a Fee Agreement is received, an initial case assessment meeting needs to be scheduled one week after the date of receipt. Therefore, when the Date of Fee Agreement field in the Client file is changed from blank to any other value, this WorkFlow will create a new calendar record for the Initial Case Assessment Meeting seven days after the value entered in the Client file.

As a modification to this WorkFlow, you could add a second action to start Word Document Assembly and compile a "Thank You" letter to the client. You could even add a third action to start Word Document Assembly and compile a "Thank You" letter to the contact that referred the client to your firm.

Sample 3: Calendar File

Start Document Assembly on Task Complete

This WorkFlow assumes that your firm tracks case milestones as periodic tasks in the Calendar file. When a milestone is reached and the associated task is marked as complete, a letter is started in Word Document Assembly to notify your client that the milestone has been reached. This letter will contain information that is specific to the client and the completed task.

As a modification to this WorkFlow, you could add a second action to automatically send an eNote to the firm's partners, letting them know the letter for the client will need their signatures.

Sample 4: Lookup Files – Contact File
Update Last Contact Date

This WorkFlow assumes that when a field is modified in the Contact file, a member of the firm has communicated with that contact. Therefore, changes to any field in a contact record will update the contact's Last Contact Date field with the current date.

As a modification to this WorkFlow, you could add a second action to create a new record in the Calendar file as a Task to remind you to follow up with the contact in two weeks regarding any further changes.

Sample 5: Common Client Related Files – Journal File
Convert Phone Calls to Fees

This WorkFlow assumes your firm enters all phone calls as phone tasks in the Journal file, and that you want to help users create fees based on these phone calls. This WorkFlow opens the Convert to Fee window whenever a new phone task is saved, and will ask you to select a Client ID if one is not defined in the phone task.

As a modification to this WorkFlow, you could set it to run only when a phone task related to a client is entered.

Sample 6: Common Client Related Files – Fee File
Notify User and Admin when Too Many Hours

This WorkFlow assumes that each fee entered can be a maximum of ten hours. If a fee is entered for more than ten hours, an eNote is sent to the firm administrator. This allows the administrator to determine whether the entry is legitimate, or whether an entry error occurred. Additionally, a message is displayed alerting the user to the unusual amount of time on the fee entry.

As a modification to this WorkFlow, you can edit the Send eNote action to automatically send so that only the message alerting the user of the excess time is displayed.

Considering these basic examples, you can see how much time can be saved using the PracticeMaster Premier WorkFlows feature. Imagine the efficiency and productivity that can be improved once these, and other more extensive and personalized WorkFlows are implemented by your firm.

Detailed information regarding the Sample WorkFlows included in this document is provided in our Knowledge Base on the Internet at **www.support.PracticeMaster.com** in article **R11307**, "All About WorkFlows."

For information regarding local resellers or consultants who can help you determine and set up the best WorkFlows for your firm, contact our Sales Department at **(402) 419-2200**.