Finally…Highly Affordable Workflow
A New and Simple Way to Automate the New File Opening Process
Jim Hammond, President, RainMaker Software, Inc.

What used to take weeks of consulting, custom programming, special file servers and a fat checkbook can now be easily accomplished in just a few days, at a very affordable cost. Using RainMaker's Electronic New Case Memo software, incorporating Microsoft® .NET Web-based workflow technology, the file opening process can finally be automated to streamline service to the client, reduce internal delays and lower costs. All this can be accomplished in just three easy steps:

- Decide how many steps are required for data input and approval.
- Design your Web screens by simply dragging data collection objects to a design palette.
- Specify the email messaging that will be automatically sent to firm members for approval of each step, to warn of a delay in processing or to announce a new client/matter number has been assigned and work can begin.

Getting Started

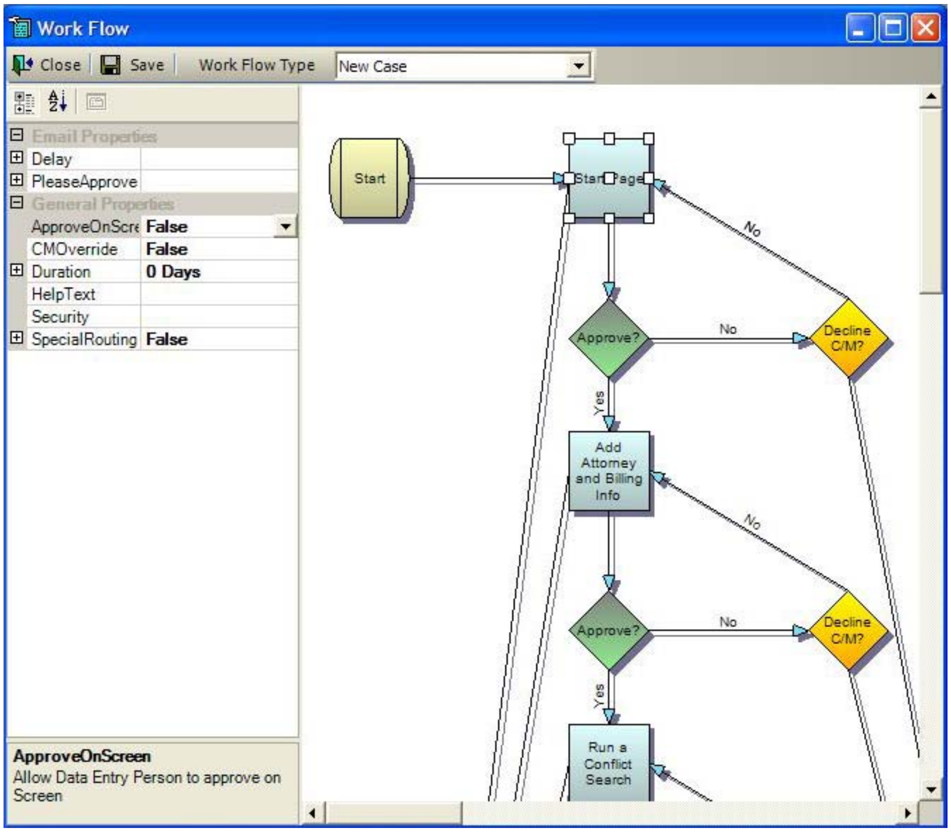
RainMaker Electronic New Case Memo software provides for a single point of data entry. When the matter is finally approved, all the information is immediately available in the time and billing, marketing, Outlook, docketing, file folder systems, case management and cost capture devices without ever re-keying. Electronic entry allows the firm to set up well-defined steps in the workflow process, along with approval or declines for each step. New attorneys and staff can easily be trained to follow the process of completing the on-screen forms and clicking the "send for approval" button.

#1 Workflow – You Specify the Process

The core of new RainMaker software is the built-in workflow capabilities; no expensive third-party products are required. Once the steps are identified, the firm specifies the routing that takes place when the user clicks 'send for approval' or actually approves the step. For example, when step one is completed and sent for approval, who then should receive it? The firm can specify an email distribution list, a single person, or someone like the billing attorney. The system will immediately send an email link to that person and log that event into the software's audit trail screen. The system is smart enough to check for mandatory data entry fields such as zip codes, addresses, phone numbers, etc. which you specify during the set-up process. This workflow can be easily set up without programmers. The RainMaker staff will discuss with you the needs of your firm and help you configure the workflow to work the way you work.

#2 Design the Intake Form – Your Way

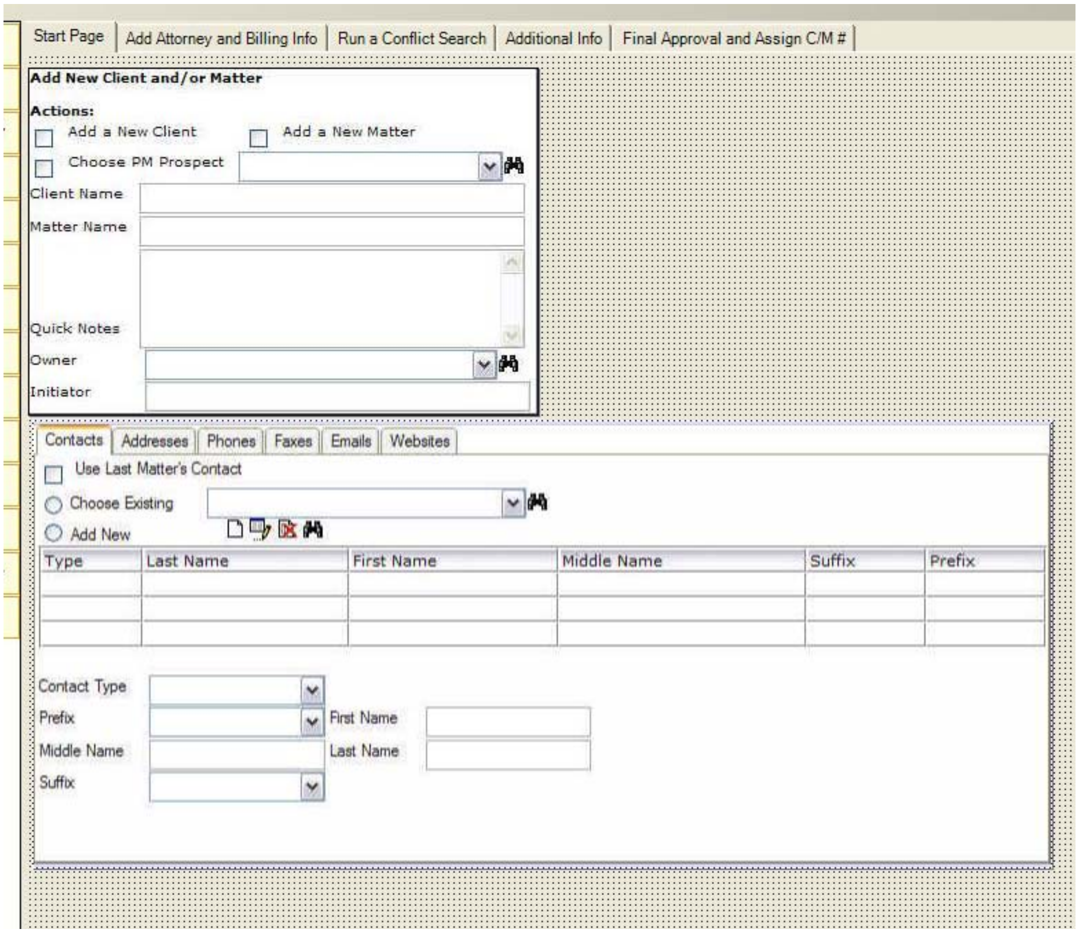
Now that the steps and routing is in place, we'll help you design the screens to meet the specific needs of your firm. Since the paper forms we'll be replacing are highly unique to your firm, RainMaker provides the ability to customize your Web screens without the use of programmers and their expenses. The screens are designed by simply dragging data entry fields onto a layout screen for each step. Move the objects around to position them the way you want your users to see them.



Here are just a few of the data entry fields RainMaker New Case Memo software provides:

- Enter in a new client and matter name or choose an existing entity from the marketing database.
- Quick entry of multiple contacts, each with addresses and phone numbers.
- Specify attorney designations such as billing, originating and other, along with any necessary credit splits.
- Entry of conflict information and automated searching across multiple databases.
- Setting billing rates, bill formats, frequency and task billing codes.
- Add new names to the marketing mail lists.
- Add information to firm-defined custom fields.

When you are done designing the screens, the RainMaker designer tool automatically builds the firm's screens into a browser format. You are now ready to begin using the system. The system can easily be deployed to the entire firm by merely emailing them a hotlink to the RainMaker internal website. The browser-based design makes the need to launch or approve intake forms from a remote office easy to do. Your IT staff will welcome it immediately since there is no software to load on to user PC's.

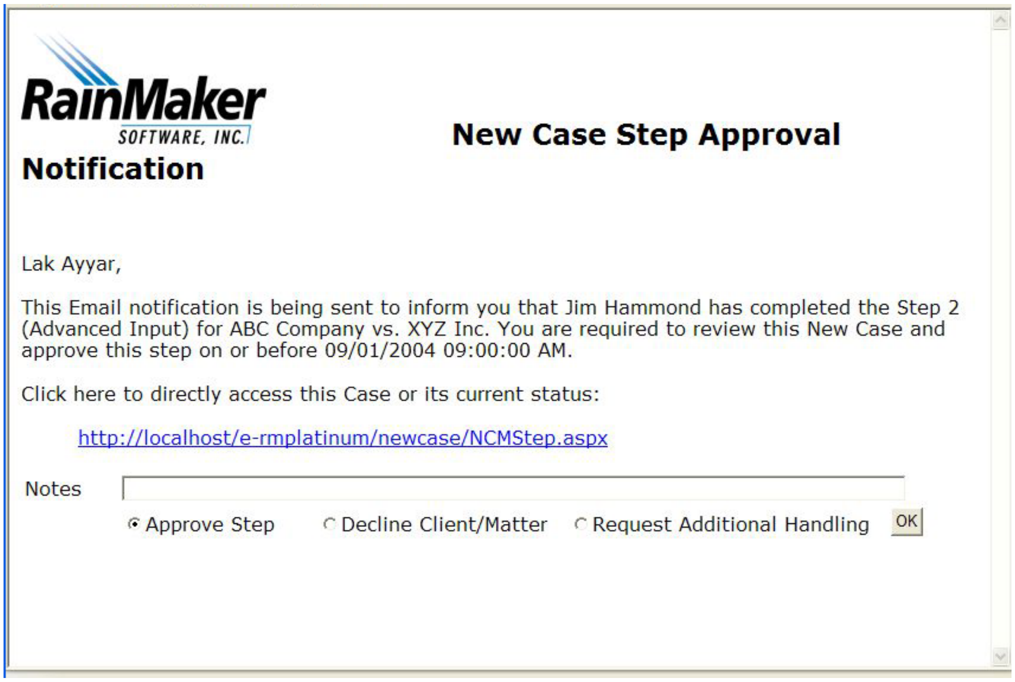


#3 Start Using the System - Email Approvals and Notifications

It is really quite simple to use the New Case Memo system. Users simply fill out the information on the screen and click "send for approval" or approve it themselves. The backbone of a workflow process is the approve-decline function. This is easily accomplished with our SmartAlert email notifications. When the firm sets up each step, they designate which users can approve the information entered. The person receiving the approval SmartAlert email clicks on the approved button and the process continues, notifying the next user to begin work.

Special SmartAlerts can be sent to managers when certain tasks take longer than the firm-defined standards of performance. For example, if you allow two hours to finish data entry in step one and it takes longer, managers will receive emails alerting them of the delay. This assures the process moves along through the firm even if a key person is busy or out of the office.

Having total control provides a level of comfort and assured results. Additionally, you can feel confident that the entire electronic New Case Memo system is reliable. With SmartAlert email approvals there is a built-in audit trail that time and date stamps all processes, creating a permanent record of what has transpired.



Conclusion

Electronic New Case Memo with workflow provides a way to plan, manage and control the intake process in your firm. It will facilitate faster response time to the client, lower costs and insure quality and accuracy. The best news is that this product comes standard in all new RainMaker systems.

About the Author

Jim Hammond, President of RainMaker Software Inc., has more than 24 years of law firm software experience. RainMaker provides mid-large law firms with proven, practical and progressive financial management, practice management and business intelligence software. He can be reached at jhammond@rainmakerlegal.com.

RainMaker Software, Inc. provides proven, practical and progressive Financial and Practice Management systems designed to help mid-to-large sized law firms and legal departments effectively and profitably manage and grow their business. With more than 36 years of legal-specific development experience, RainMaker has consistently delivered stable and feature-rich, yet easy to use solutions.

For more information regarding RainMaker's products, interested parties can contact the sales department at 1.800.341.4012 x3413 or via email at legalinfo@rainmakerlegal.com.