WHAT IS A WORKFLOW?

Maximize your legal workflow efficiences

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WHAT IS A WORKFLOW?

There are many types of workflows your organization may currently use. We offer a template for how you can utilize workflow software to help you reduce administrative burden and increase the productivity of your team.
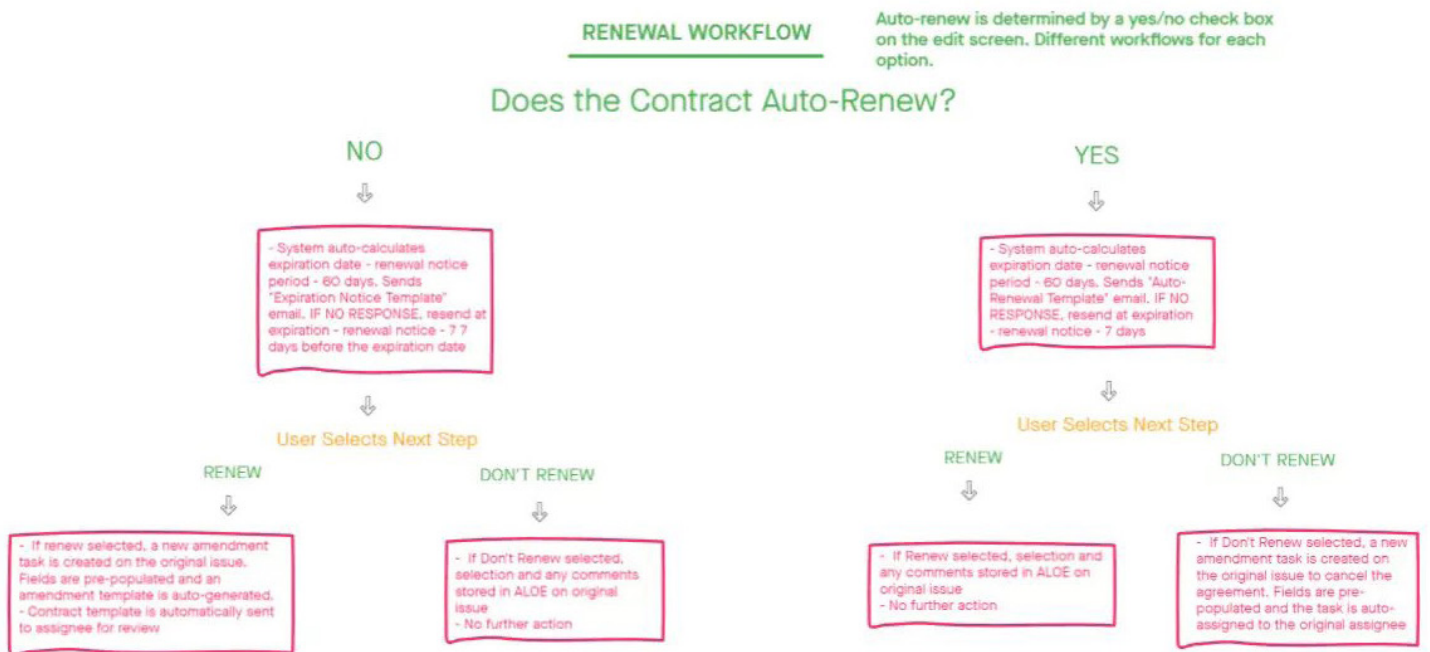
1. NDA Automation Workflow

Simple documents like NDAs don't require negotiation or attorney input, but can suck up a legal team's time that they could be spending on revenue-generating work.

2. Renewal Workflow

Workflow software can activate specific workflows based on criteria set by your team. The submitter can select what type of renewal was agreed upon. Based on the contents of this field, ALOE determines which set of actions need to be taken.

RENEWAL WORKFLOW

Auto-renew is determined by a yes/no check box on the edit screen. Different workflows for each option.

Does the Contract Auto-Renew?

NO

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- System auto-calculates expiration date - renewal notice period - 60 days. Sends "Expiration Notice Template" email. IF NO RESPONSE, resend at expiration - renewal notice - 7 7 days before the expiration date

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User Selects Next Step

RENEW

⇩

- If renew selected, a new amendment task is created on the original issue. Fields are pre-populated and an amendment template is auto-generated.
- Contract template is automatically sent to assignee for review

DON'T RENEW

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- If Don't Renew selected, selection and any comments stored in ALOE on original issue
- No further action

YES

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- System auto-calculates expiration date - renewal notice period - 60 days. Sends 'Auto-Renewal Template' email. IF NO RESPONSE, resend at expiration - renewal notice - 7 days

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User Selects Next Step

RENEW

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- If Renew selected, selection and any comments stored in ALOE on original issue
- No further action

DON'T RENEW

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- If Don't Renew selected, a new amendment task is created on the original issue to cancel the agreement. Fields are pre-populated and the task is auto-assigned to the original assignee

WHAT IS A WORKFLOW?

3. Finance Approval Workflow

These are if/then workflows. Many organizations use initiates as a finance approval process when a vendor contract exceeds an established amount. If the organization intends to spend more than a targeted amount, then an approval email is automatically sent to the Finance team.

Finance Approval Workflow

Does the vendor contract cost $5,000 or more?

NO

YES

No action taken

When the issue is created, ALOE automatically sends an email to the email address input in the "Finance Approval Email" field [client provides email language at setup]

Finance approver approves or rejects

If the finance approver clicks "Approved," the result is logged in ALOE and the issue can move to completed at any time.
If the finance approver clicks "Rejected," the result is logged in ALOE and the issue cannot be sent for signature until the comments are resolved.

4. Auto-Generate Tasks Workflow

Avoid duplication, auto-gen task create a series of related sub-tasks that automatically generate and copy the information from the original matter. This allows you to input your information once and have a designated place to track every related matter you may need.

Auto-Generate Tasks - Workflow

When a "Trademark Prosecution" matter is created

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When this matter type is created, the system will auto-generate sub-tasks related to the issue:
- Collect Collateral
- Collect Trademark Graphics
- Draft Applications

These sub-tasks will take relevant information input into the original "Trademark Prosecution" matter and add it to the sub-tasks to alleviate administrative input

5. DocuSign Workflow

This workflow creates and sends the DocuSign envelope once you determine the document is ready for signature. ALOE, recognizes when the document has been signed and automatically stores the completed document in your system and marks the matter as completed.

DocuSign Workflow

When the document is ready for signature

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User moves the final document to the "For Execution" attachment category in the ALOE ticket, then moves the ticket to the "Pending Signatures" status

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When the issue moves to the "Pending Signatures" status, the file in the "For Execution" attachment category is sent via DocuSign to the emails in the "Internal Signer Email" and "External Signer Email" fields

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The document is signed

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A final, signed copy is sent to the requester through the email input in the "Your Email" field in the intake form, or collected through ALOE in the "Reporter" field.

The final document is saved in the repository.

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The matter is automatically marked as "Done" and an alert is sent to the assignee.