CARET Legal

Make the switch to CARET Legal

CARET Legal has a dedicated team of professionals who work tirelessly to ensure a seamless and highly accurate onboarding process for clients. Our team understands the importance of a hassle-free transition and we take the time to understand each client's unique needs and work closely with them to ensure that the implementation process is as smooth as possible.

Our team uses the latest technologies and techniques to ensure that the data migration is accurate and secure, with minimal downtime and disruption to the client's business. With CARET Legal, clients can rest assured that they are in good hands and that the transition from a wide range of applications to our software will be quick and efficient.

We provide the broadest breadth of data for the smoothest transition including:

- Custom data specific to your business
- Email and calendar history preservation
- Core and detailed customer and financial data migration

Implementation Packages

		Lite	Extended	Extended Plus
Fundamental	Contacts	✓	✓	✓
	Basic matters data	✓	✓	✓
	Practice areas	✓	✓	✓
	Calendar sync	✓	✓	✓
	Calendar events			✓
Contacts, Communications and Work	Extended matter data		✓	✓
	Matter related contacts		✓	✓
	Matter notes / phone call notes		✓	✓
	Tasks		✓	✓
	Vendor list		✓	✓
	Emails			✓
	User / matter rates & rate cards			✓
Financial Data	AR balance forward			✓
	Trust balances		✓	✓
	Opening retainer balances		✓	✓
	WIP (unbilled time and soft costs)		✓	✓
Custom Needs	Chart of accounts		✓	✓
	Contact / matter custom fields			✓

Additional services available by quote

Additional Services

- Migrate data from multiple source systems
- OCR Document Indexing
- AR by Timekeeper Import
- Split Billing Import
- Consolidated Billing Import
- Office 365 Email Upgrade
- Import Interest on outstanding balances
- Import Sales Tax

Available at Anytime

- Document Template Writing
- Custom Report Writing (Coming Soon)
- Additional Deep Dive Training
- Ongoing New Hire Orientation Training
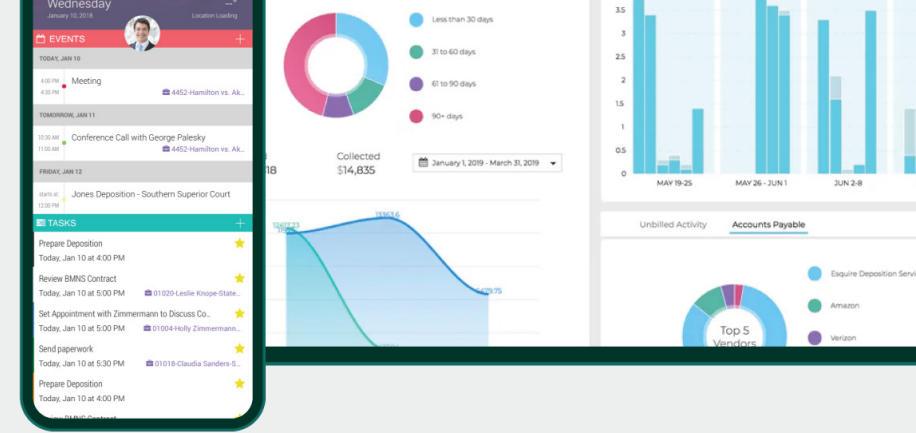- Intake Forms Development
- Custom Permissions & Ethical Walls

Our expert trainers will help you craft your learning journey

6 Hours of Live Training Included in Your Package, Tailored to your needs and Goals.

- Overview & Navigation
- Accounting & Billing
- CRM
- Document Automation
- Your First Billing Cycle
- Personal Injury capabilities
- Q&A Sessions

Your Implementation Journey

- Kickoff Call and Payments Onboarding
- Data Assessment and Discovery
- Implementation Interview
- Data Migraton and Training
- Final Data Review
- Go Live!

Your CARET team

Onboarding Specialist

- Your guide throughout the Onboarding journey
- Answers questions, provides best practices
- Coordinates logistics with other supporting teams

Project Manager

- Manages your data migration process
- Conducts the data assessment process to ensure that questions are addressed ahead of the final data migration

Payments Onboarding Specialist

- Guides you through the payment application
- Provides updates on application status
- Schedules payments training once approved

Please contact us for your quote today →

Please note that all packages with pricing are dependent on the number of users. Additional charges may apply for firms with over 30 users, if additional data is required, or if there is more than one source system for data import.