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# **PRACTICE MANAGEMENT**

**BUYER'S GUIDE: 2023 EDITION**

# CARET Legal

Harness a Powerful and Secure Practice Management Platform to Take Firms, Professionals, and Their Clients Further

**CARET Legal offers legal teams matter management solutions, including task management, client relationship management (CRM), document automation and management, communication management, notes organization, reporting, and billing and accounting”**

**Company Name Brand**  
CARET

**Product Name Brand(s)**  
CARET Legal

#### Latest Developments and Updates

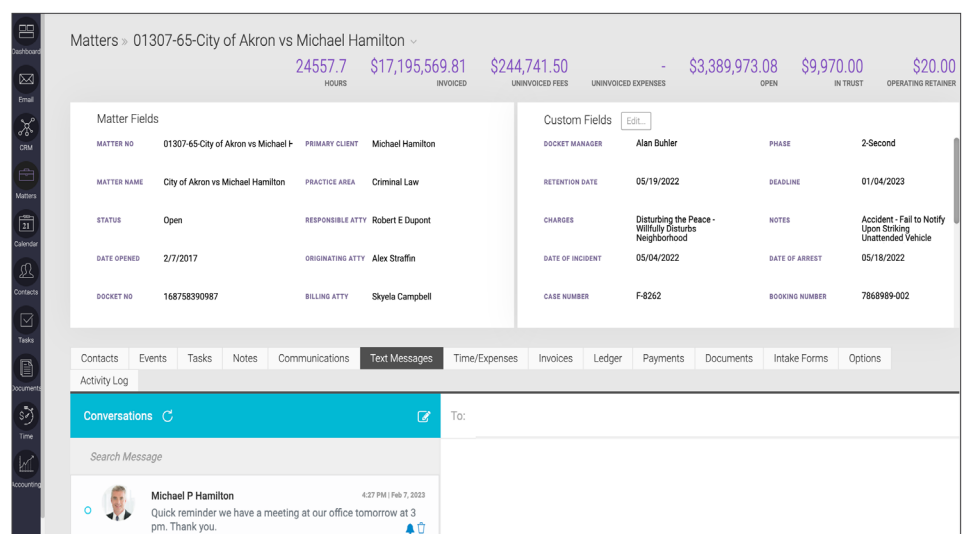
- Client texting: **communicate with clients via text** within the CARET Legal platform without needing to jump between applications or devices. Whether sending a quick message or setting up an appointment, the new in-app, two-way SMS messaging system provides another way for team members to efficiently manage important communication while providing a superior client experience.
- Email improvements: filing email correspondence is easier than ever. The platform automatically detects emails from contacts based on the pertinent matter, saves documents to a matter file, and converts them to specific tasks. The email system also offers encryption,

court-admissible proof of delivery, and electronic signatures.

- Integrated payment processing: convenient client payment methods are available via credit card, ACH, and e-check payments, so the firm gets paid faster.
- Sub-accounting: subdivide accounts for more detailed reporting and easier aggregation. Subdivided accounts appear under the parent account assigned to them. Users can view their balances as well as totals for the parent account, making reporting a breeze.
- Batch check printing: rather than printing checks one by one, select a group of checks and print them all simultaneously. You can choose the bank account and date range of the checks to print, giving office staff precise control and a more straightforward process.

#### Robust Practice Management

CARET Legal is a highly intuitive platform for firms to represent and work with their



**Figure 1:** In addition to text messages, a user can access contacts, events, tasks, notes, communications (emails), time/expenses, invoices, ledger, payments, documents, intake forms, options, and an activity log.

**CARET Legal now features embedded payment processing to allow firms to accept credit card, ACH, or e-check payments and save payment information for future use. Additionally, a firm can use a secure, firm-branded portal to share invoices and enable easy payments.”**

clients. Everything, from the interface to reporting, provides insightful and concise options for all users. CARET Legal offers legal teams matter management solutions, including task management, client relationship management (CRM), document automation and management, communication management, notes organization, reporting, and billing and accounting. Some key areas CARET Legal has focused on developing include client communication and accounting functionality.

#### Client Communication

Solid communication can be the difference between success and failure. With this in mind, texting and email enhancements have been made within the CARET Legal platform.

Communicating with the legal team no longer requires that a client is tethered to their desktop. With CARET Legal, firm members are assigned a secondary “firm number” to use for SMS texting with clients, negating the need for the legal team to expose their personal cell phone numbers. All text messages are organized within a matter, providing date and time stamps for each message, thereby building a communication timeline. Additionally, CARET Legal offers the use of group chat simply by adding team members to a conversation. The matter dashboard provides multiple ways to access text messages – a user can click on the text bubble icon in the top right corner of the

screen or click on the text messages tab from the matter dashboard. *See Figure 1 on the previous page.*

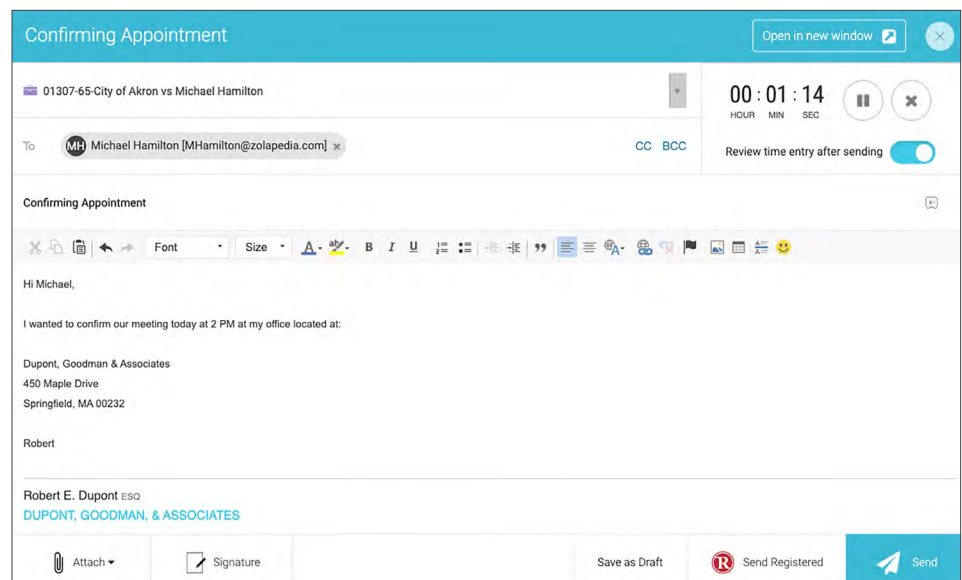
These enhancements in client texting have made it easier for clients and legal teams to collaborate on a matter, whether in the office or away from their computers, fostering a positive and productive working relationship.

CARET Legal offers intelligent email management. Integrations with Microsoft 365, Exchange, and G Suite allow a user to easily manage case-related email messages through their existing email account without needing a cumbersome workaround. The platform’s patented Smart Suggest System™ will find case-related contacts and file emails for each matter, and a user can convert an email to a task with a single click. *See Figure 2.*

#### Accounting

CARET Legal delivers a complete accounting system for law firms, providing trust and business accounting features, multiple ways to create time entries, invoicing, advanced reporting with real-time visibility, payment processing, and expense payments.

CARET Legal now features **embedded payment processing** to allow firms to accept credit card, ACH, or e-check payments and save payment information for future use. Additionally, a firm can use



**Figure 2:** CARET Legal allows team members to easily add emails and contacts to a matter and convert them to tasks without missing a beat.

“ Law firms using CARET Legal report they recoup their investment 31% faster than G2’s legal practice management software category average.”

a secure, firm-branded portal to share invoices and enable easy payments. Processing fees are only pulled from operating accounts, which include fees for ACH. *See Figure 3.*

Sub-accounting is available, enabling a firm to group accounts under a parent account. This allows a user to view a total under that parent account, in addition to a breakdown of the individual account balances, providing helpful insight into spend and revenue.

CARET Legal's offerings provide a workspace for legal teams' daily work, reducing the need for other tools to manage a case from beginning to end.

### Reporting and Analytics

CARET Legal has a customizable reporting dashboard displaying helpful information at a glance. Additionally, there are over 30 reports included that can be customized based on filtering. The reporting areas available are client, compensation, productivity, vendor, trust, and accounting—and each has several reports available.

### Integrations and Security

In addition to email integrations, CARET Legal offers integrations with document management, calendars, and more.

CARET Legal employs state-of-the-art technology to detect, investigate, and stop threats before they impact their clients' operations. This includes external security audits, advanced encryption, secure data transmission via bank-grade TLS

encryption that prevents digital eavesdropping by unauthorized parties, brute force attack countermeasures, and data redundancy/backup protocols.

CARET Legal's infrastructure resides at AWS facilities in the United States which have achieved compliance with an extensive list of global quality and security standards, including ISO 9001, ISO 27001, and PCI DSS. In addition, CARET Legal has achieved SOC 1/ISAE 3402 and SOC 2 compliance.

### Pricing

CARET Legal's tiered pricing model offers flexibility to accommodate a firm's needs. Please visit [caretlegal.com/pricing](https://caretlegal.com/pricing) for current subscription tiers and associated pricing.

### Who is CARET?

A new name that exemplifies the mission. A caret (^) is a symbol that creates space for what's to come. It makes room for expansion and represents the company's commitment to caring for clients and helping them succeed. Going deeper, the CARET team defined these values to guide how they show up for each other, their partners, and their customers: succeed together, embrace progress, care big, and create space for what is next.

**CARET** brings the latest technology and automation to thousands of legal firms, empowering legal professionals to refocus their expertise on what truly matters. CARET harnesses powerful and secure practice management, document automation, and

The screenshot displays the CARET Legal client portal interface. At the top, the logo for 'DUPONT, GOODMAN & ASSOCIATES' is visible, along with a user name 'gsmith' and a 'Logout' button. Below the header, there is a table of documents with columns for 'Document Name' and 'Matter'. The documents listed include 'RL-Envelope.docx', 'U-0087-01\_P123.doc', 'Letter to Orthopedic- medical records.docx', 'Medical expenses detail.xlsx', 'Draft against the warrant.pdf', and another 'Letter to Orthopedic- medical records.docx'. Below this, a section titled 'Shared Invoices' shows a list of invoices with columns for 'Invoice No', 'Invoice Date', 'Paid Status', 'Total', 'Balance', and 'Print'. Two invoices are listed: one for \$150.00 and another for \$50.00, both marked as 'Not Paid'. A 'Pay Now...' button is located at the bottom right of the invoice list.

**Figure 3:** CARET Legal's client portal provides an easy way for a client to pay using a credit card. PayNow links can be sent by email, and clients can click the link and follow the instructions to make a payment. The system knows how to record the payment and automatically updates an invoice as paid or partially paid.

payment processing to take firms, professionals, and their clients further. CARET Legal, previously known as Zola Suite, is the company's leading cloud-based legal practice management (LPM) platform.

#### **Why Buy CARET Legal?**

- Law firms using CARET Legal report they **recoup their investment 31% faster** than G2's legal practice management software category average.

- Eliminate manual timekeeping with 10+ integrated methods to track billable hours automatically.
- Legal professionals can securely access critical client data on the go. CARET Legal is cloud-based and the first SOC 2 compliant solution that enables the freedom to work from anywhere, including the mobile app, while keeping client data secure.
- Drive more revenue and decrease A/R cycles with integrated accounting and

billing. Quickly and accurately calculate invoices without the need for additional accounting staff or specific software. Expedite billing cycles by offering clients convenient payment methods such as ACH and credit cards.

#### **Try CARET Legal Today!**

See how CARET Legal can benefit you, **[schedule a demo today!](#)**



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