

CARET Legal

Training Modules

The CARET Legal training program is designed and delivered by industry experts, providing top-tier instruction that is unmatched in the field. The individual modules are tailored to meet the needs of professionals at all levels, from entry-level to advanced. Education sessions are provided through a combination of online and in-person instruction, providing participants with flexibility and convenience without sacrificing quality.



Quick Start

- Navigation
- Email
- Calendar
- Tasks
- CRM
- Matter Management
- Time & Expense entries



Accounting

- Billing & Accounting Firm Settings
- Invoices & Payments (A/R)
- Vendor Bills (A/P)
- Reporting



Other Topics

- LEDES Billing
- Personal Injury Module
- CRM
- APX
- Enterprise Advance Document Automation



Billing

- Review Time & Expense entry
- Generating invoices
- Editing invoices
- Communicating invoices
- Trust Mangement
- Payment application



Document Automation

- Document management
- Document editing
- Templates/Intake Forms
- Client Portal for Documents

Learn more how our training program can help you use the tools within CARET Legal.

Visit our help center on www.caretlegal.com or contact us at 1-800-500-3627.