

# CARET Legal

## Supercharge how your firm works

Imagine your busy work on autopilot: CARET Legal Workflows allow your firm to schedule tasks and meetings based on case type, facilitating upcoming steps as your team works through each matter.

Leave missed deadlines and forgotten tasks behind while unleashing the full potential of your firm.



### How it works

#### CREATE A WORKFLOW TEMPLATE

The options are endless. Easily create new templates in just a few clicks for any type of matter you typically work on. There is no limit to the number of tasks or calendar events that can be added in a workflow template.

#### ADD TASKS OR CALENDAR EVENTS

Optimize the way your team works. Using pre-defined templates, team members can easily kick-off a new matter, ensuring your firm is reminded of all needed events and tasks, and your team provides a consistent experience to clients.

#### CHOOSE THE ANCHOR DATE

Each workflow template consists of tasks or events. Choose the event or task that will serve as the anchor date. When a template is triggered, tasks and calendar events will automatically show up in both your and your team's calendar, facilitating the next steps.

### Learn more

CARET Legal Workflows is now available in Enterprise Plus and Enterprise Advance plans.

Visit [caretlegal.com/workflows](https://www.caretlegal.com/workflows) to schedule a customized demo.

### Why CARET Legal Workflows

#### AUTOMATE OPERATIONS TO RECLAIM YOUR TIME

Say goodbye to repetitive tasks and eliminate the need for manual intervention, freeing up time to focus on strategic initiatives.

#### STANDARDIZE PROCESSES TO MINIMIZE ERRORS

Implement uniform processes across your practice to reduce the risk of errors and ensure consistent quality.

#### BOOST EFFICIENCY TO ACHIEVE YOUR GOALS

Unleash the full potential of your resources and accelerate progress with organized workflows that enhance firm performance.

