

Family Law Automation Cheat Sheet

10 MyCase + Zapier Workflows · ReliantByte Solutions · mark@reliantbyte.com · Book a free 20-min discovery call

#1 New Lead Auto-Response

- TRIG** Intake form submitted
- 1 SMS + email confirmation sent within 60 sec
 - 2 Internal attorney alert triggered

Saves 3–5 hrs/wk MyCase · Zapier · RingCentral · Gmail

#2 Appointment Confirmation + Reminder

- TRIG** Consultation scheduled in MyCase
- 1 Confirmation SMS + email sent immediately
 - 2 24-hr reminder + no-show follow-up at +15 min

Saves 2–4 hrs/wk MyCase · Zapier · RingCentral · Gmail

#3 Post-Consultation Follow-Up

- TRIG** Consultation marked complete
- 1 Follow-up email in 60 min: next steps + engagement link
 - 2 48-hr SMS nudge if no pipeline movement

Saves 2–3 hrs/wk MyCase · Zapier · Gmail · RingCentral

#4 Document Collection + Follow-Up

- TRIG** Document request task created
- 1 Secure upload link + deadline sent to client
 - 2 48-hr reminders × 3; internal escalation after 3rd

Saves 3–5 hrs/wk MyCase · Zapier · RingCentral · Gmail

#5 Invoice Paid → Google Review Request

- TRIG** Invoice marked paid in MyCase
- 1 Zapier waits 24 hours
 - 2 Personalized SMS with direct Google review link

Saves 1–2 hrs/wk MyCase · Zapier · RingCentral · Google Business

#6 Intake Form → CRM Pipeline Entry

- TRIG** Web intake form submitted
- 1 Contact created + pipeline stage set in MyCase
 - 2 Practice area tag applied from form answers

Saves 2–3 hrs/wk Lawmatics · Zapier · MyCase

#7 After-Court Dictation Pipeline

- TRIG** Voice memo uploaded to Google Drive
- 1 Zapier sends audio to transcription service
 - 2 Transcript emailed + filed in MyCase

Saves 2–3 hrs/wk Google Drive · Zapier · Otter.ai · MyCase

#8 PDD Status Update Notification

- TRIG** Petition task marked "Filed" in MyCase
- 1 Client emailed: status update + next hearing dates
 - 2 Next deadline task auto-created in MyCase

Saves 1–2 hrs/wk MyCase · Zapier · Gmail

#9 Stale Lead Re-Engagement

- TRIG** Lead inactive 14+ days in pipeline
- 1 Zapier detects no stage movement
 - 2 Re-engagement SMS sent; contact flagged in MyCase

Saves 1–2 hrs/wk MyCase · Zapier · RingCentral

#10 New Client Welcome Sequence

- TRIG** Engagement agreement signed
- 1 Welcome email: portal login, expectations, contact info
 - 2 Staff onboarding task checklist created in MyCase

Saves 1–2 hrs/wk MyCase · Zapier · Gmail · DocuSign

Ready to set these up? Book a free 20-min call →

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