

MITRATECH

Mitratech Document Automation (HotDocs) for Salesforce

Draft, Generate, and Govern Documents Without Breaking Workflow



Automate and Accelerate Salesforce Workflows with Mitrtech Document Automation (HotDocs)

Salesforce manages the structured data teams rely on every day, but document creation often happens outside of Salesforce, disconnected from the data it depends on. This causes delays, introduces errors, and requires teams to manage multiple tools to draft and assemble documents.

Mitrtech Document Automation (HotDocs) brings enterprise-grade document generation together with Salesforce record data. Instead of creating documents in isolation, Salesforce data is passed into HotDocs interviews to prefill content, guide users through the required inputs, and generate documents that reflect current business context.

By embedding document creation into Salesforce, teams can generate accurate, consistent documents and save them back to the record for reuse, sharing, and audit needs. **Data and documents stay aligned, and work moves forward without switching systems or changing existing workflows.**



When Documents Aren't Connected to Salesforce Data

When document creation is disconnected from Salesforce records, teams are forced to bridge the gap manually.

This often results in:

- **Manually pulling** record data into documents
- **Rechecking information** to ensure accuracy
- **Creating documents without** full or current context
- **Switching between tools** to complete and store files
- **Managing inconsistencies** across versions and teams

These extra steps introduce friction, increase the risk of errors, and interrupt the flow of work between Salesforce data and the documents built from it.



The New Reality: Salesforce Users Need Data-Driven Document Creation

Teams that generate documents with consistent structure, defined variations, and embedded logic depend on more than templates alone. They depend on accurate, up-to-date Salesforce data to feed reliable information directly into documents.

When documents must draw directly from Salesforce fields, conditions, and calculations, creating them outside the system introduces risk and rework. Embedding document creation into Salesforce allows teams to generate documents quickly and accurately at scale—using the same data they rely on to run their business.

Keep reading to learn how document automation accelerates document drafting and execution inside Salesforce in three steps.

How Document Automation Accelerates Document Drafting and Execution Inside Salesforce:

STEP 1

Open a Salesforce record and select “Launch Interview” to kickstart a guided Mitrtech Document Automation workflow directly from any standard or custom record, so users can create documents without leaving Salesforce or managing external tools.

The image illustrates the first step in using Mitrtech for document automation within Salesforce. It features a man and a woman in professional attire standing in a modern office setting. In the foreground, a large tablet displays the Mitrtech Salesforce interface. The interface shows a record for "David Jackson Living Will" with a "Launch Interview" button highlighted. A modal window titled "Launch HotDocs Interview" is open, showing a list of documents to launch.

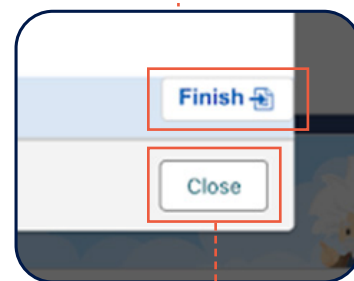
Name	Description	Record Type	Action
Case Cloud Integration Test			
Estate Planning - Simple Will		-	Launch
Sample US Employment Agreement	A sample HotDocs Template package to generate an ...	-	Launch

STEP 2

Prefilled Salesforce data minimizes manual entry and reduces the risk of errors. Users can review that information for accuracy and relevance, then complete any remaining fields at their own pace – with the flexibility to pause and resume, even during longer or interrupt-driven workflows.

The image shows a woman in a business suit looking at a tablet. The tablet displays the Mitrtech CaseCloud LPM interface. The main screen shows a 'Testator Information' form for 'David Jackson Living Will'. The form includes fields for First Name, Middle Name, Last Name, Gender, Marital Status, Spouse Information, Country, and State. A red box highlights the 'Finish' button at the bottom right of the form.

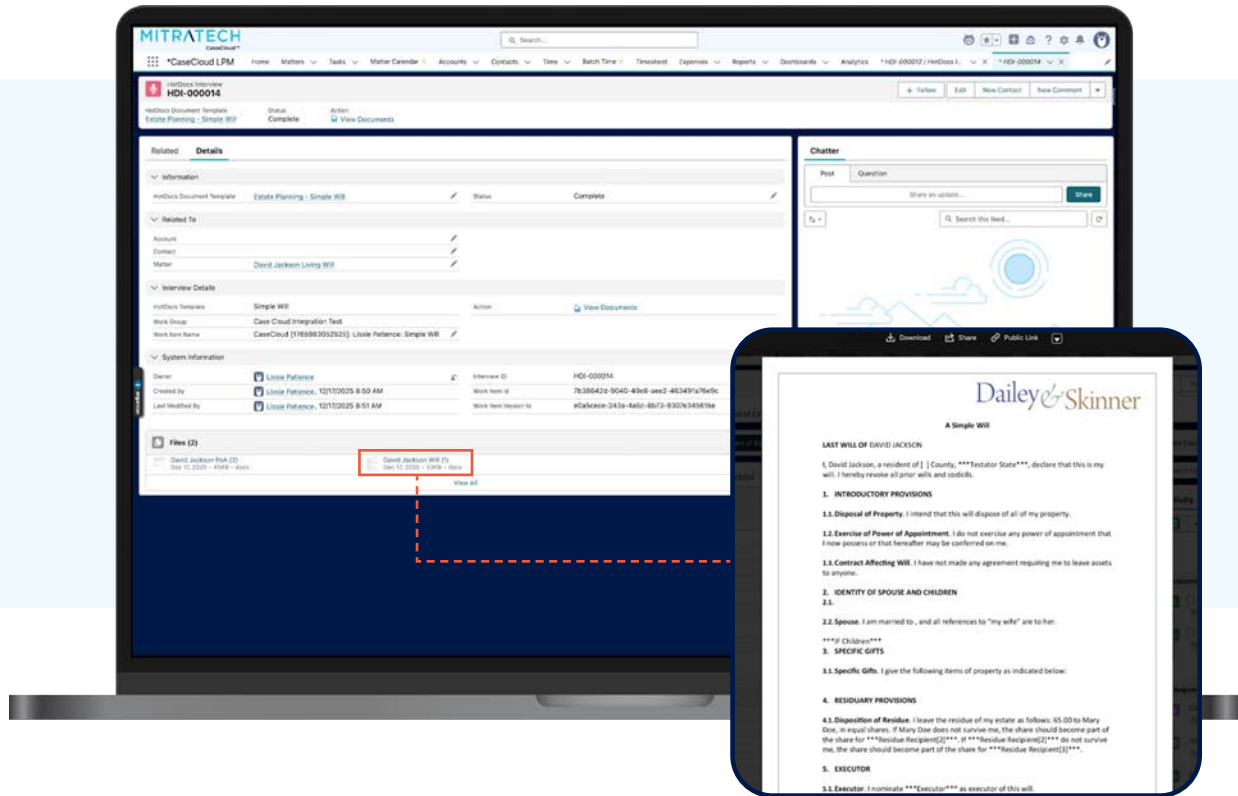
Review prefilled Salesforce data to minimize manual entry and errors, complete any remaining fields at your own pace, and click “Finish” to generate documents.



Click the “Close” button at any time to save your progress.

STEP 3

After clicking “Finish,” documents are automatically assembled and saved to the Salesforce record, keeping documents centralized, reusable, and always version-correct.



What Others are Automating

Document Automation supports a wide range of operational, customer-facing, and internal document-driven processes inside of Salesforce.



Generating client proposals directly from opportunity records



Producing service agreements from account or contract objects



Creating compliance certificates from audit data stored in Salesforce



Generating HR offer letters or onboarding packages from employee data



Producing insurance claim summaries from case data



Producing statements of work from closed-won opportunities



Automation Use Cases and Document Types Across Teams and Industries

Teams	Document Types
Sales and Revenue Teams	Proposals, sales and renewal agreements, statements of work, engagement letters, renewal notices, and reminder letters generated directly from opportunity, account and account data.
Legal Departments and Law Firms	Engagement letters, franchise agreements, contract variations, notices, and standardized legal correspondence created from matter, account, or contract records.
Finance and Banking	Loan agreements, approval documentation, financial summaries, and customer communications generated from Salesforce financial and account data.
Risk, Compliance and Audit	Compliance certificates, disclosures, questionnaires, audit-ready documentation, and risk notices assembled from structured Salesforce records.
Customer Support and Service	Case summaries, resolution letters, claim documentation, and customer notices produced directly from case and service records.
HR and People Operations	Offer letters, onboarding packages, policy acknowledgments, and internal documentation generated from employee and HR data stored in Salesforce.



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About Mitratesch

Mitratesch has a 35-year history as a leader in providing technology and services that empower organizations to automate compliance, manage risks, increase efficiency, control costs, and scale for the future.

Mitratesch serves over 28,000 organizations worldwide, spanning more than 160 countries. For more information, please visit: www.mitratesch.com

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