

MITR^TECH

Integrated Document Automation for Case Management

One embedded workflow to accelerate
throughput, eliminate errors, and
streamline the legal lifecycle.





Introducing Integrated Document Automation for Mitrates CaseCloud™

Mitrates CaseCloud™ provides legal teams with a structured system for managing matters and related data, but document creation has often lived outside that workflow. Manual drafting, rekeying information, and inconsistent templates slow progress, increase risk for errors, and add friction to otherwise well-organized case work.

Mitrates Document Automation software, Mitrates HotDocs, is now built directly into the Mitrates CaseCloud™ Case Management solution. Using guided interviews, conditional logic, and approved templates, the HotDocs platform generates documents that adapt to each scenario based on data stored in the relevant Salesforce record.

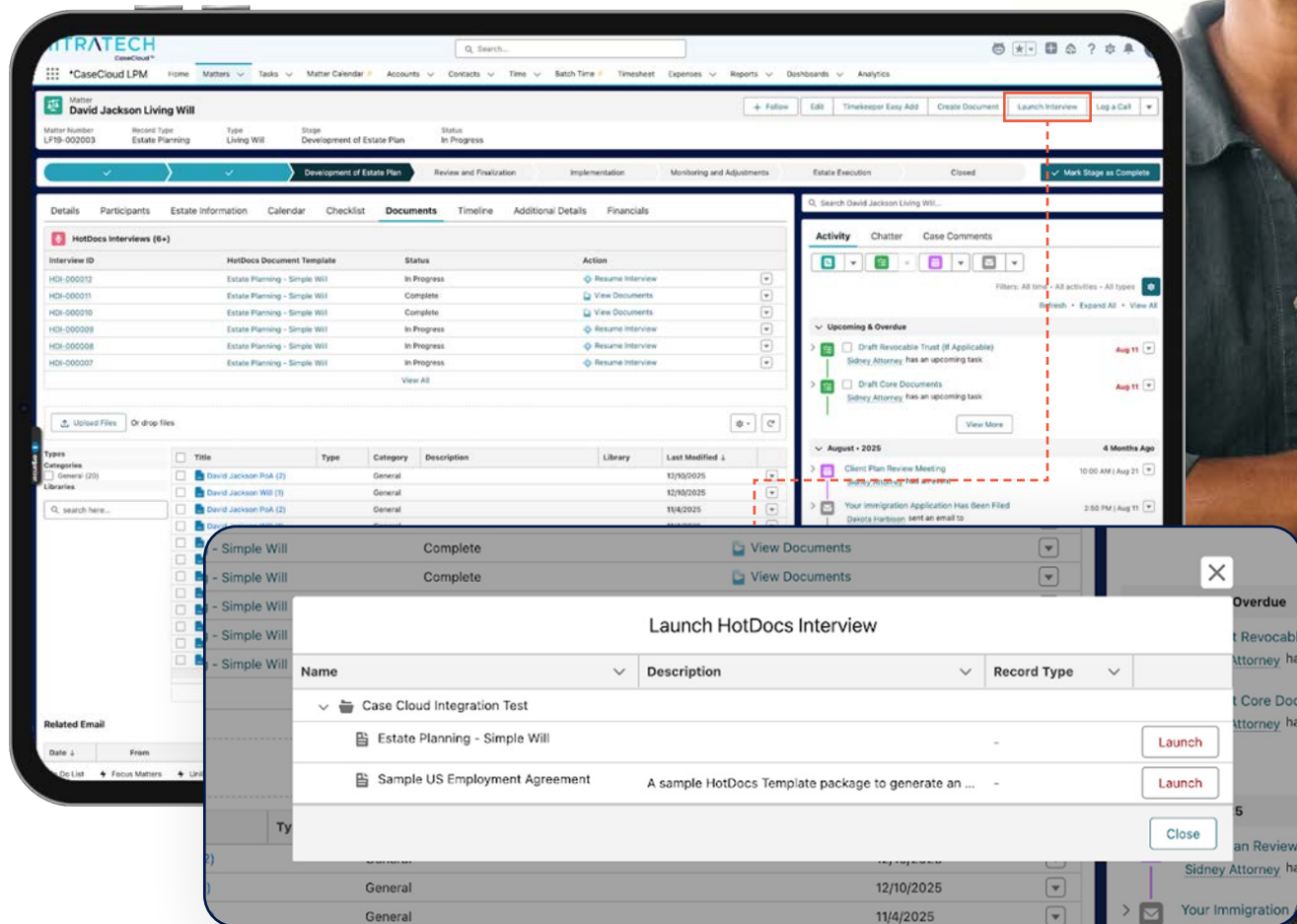
The result is faster case progression, reduced operational effort, and more consistent, compliant documents, without changing existing Mitrates CaseCloud™ workflows.

Keep reading to learn how document automation accelerates document drafting and execution Inside Salesforce in 3 steps:

How Automation Accelerates Document Drafting and Execution Inside Salesforce:

STEP 1

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



The image shows a woman with dreadlocks smiling, standing next to a large tablet displaying the Mitratesch CaseCloud LPM interface. The interface shows a Salesforce 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.

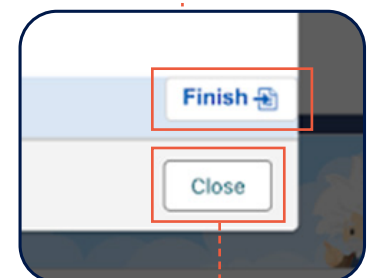
Name	Description	Record Type	Action
Case Cloud Integration Test			
Estate Planning - Simple Will		-	Launch
Sample US Employment Agreement	A sample HotDocs Template package to generate an ...	-	Launch

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 tablet displaying the CaseCloud LPM interface. The screen displays a 'Testator Information' form for 'David Jackson Living Will'. The form includes fields for First Name, Middle Name (optional), Last Name, Gender, Marital Status, and Spouse Information. A red box highlights the 'Finish' button at the bottom right of the form.

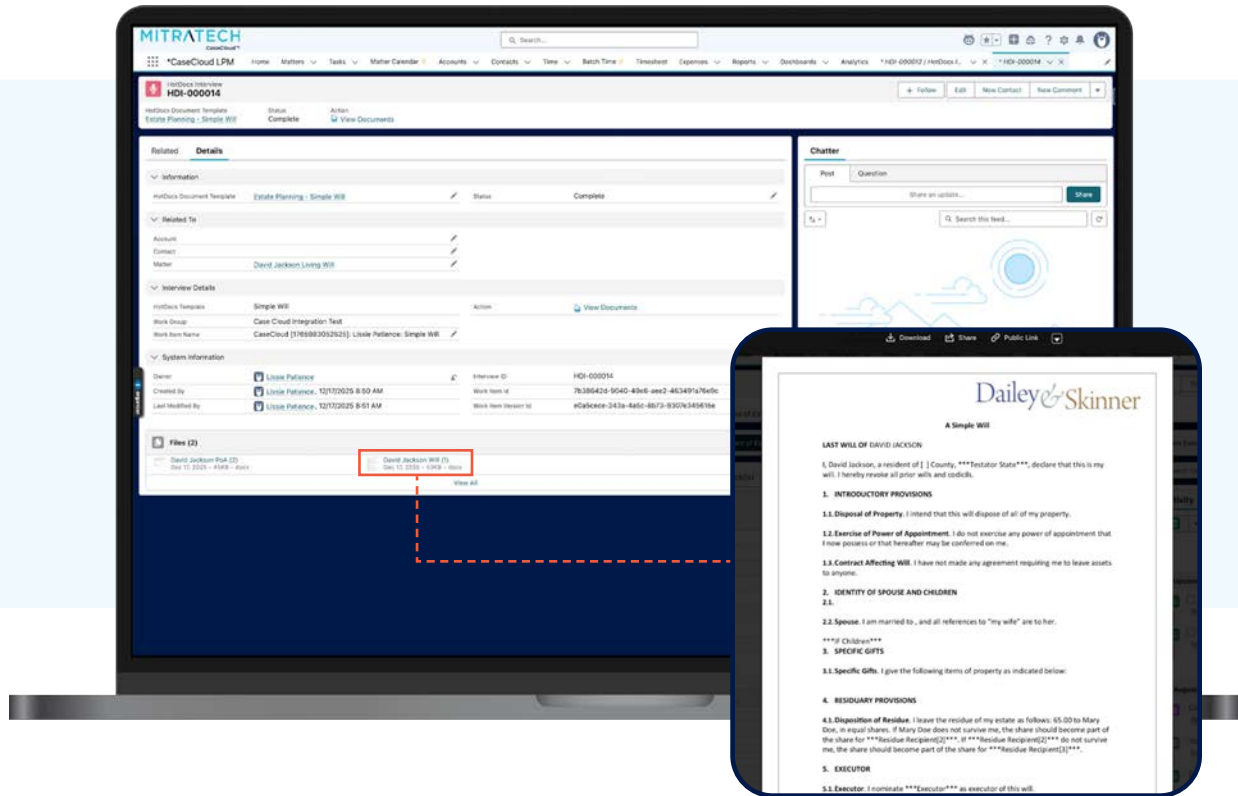
Review prefilled Salesforce data to minimize manual entry and errors, complete any remaining fields at your own pace, and click “Finish” to generate documents.



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.



Why This Matters for Mitrates CaseCloud™ Users

By combining structured case data with Mitrates Document Automation (HotDocs), legal teams can streamline document creation while maintaining accuracy and consistency across every case.

Key benefits include:

- **Meaningful time savings per document**, especially for repeatable or complex legal documents
- **Reduced rework** by generating documents from approved templates and live case data
- **Fewer errors and greater consistency**, driven by pre-filled case data and the use of approved templates to reduce manual entry.
- **Easier adoption**, since document creation happens inside existing workflows
- **Greater confident in outputs** by enforcing approved language and logic across every generated document

Together, these benefits help legal teams accelerate legal work while maintaining consistency and compliance, embedded directly within Mitrates CaseCloud™.



Combined Benefits of Mitratesh Case Management (Mitratesh CaseCloud™) and Document Automation (Mitratesh HotDocs)



Operational Efficiency

Mitratesh CaseCloud™ stores structured case data, and HotDocs transforms that data into documents instantly — reducing repetitive drafting.



Accuracy Through Data + Logic

Documents are driven by validated data and embedded rules, reducing variability and ensuring every output follows the same standards.



Consistency Across Case Types

Approved templates produce uniform, compliant documents across all case types and practice areas.



Workflow Continuity

Create documents directly within Mitratesh CaseCloud™, without breaking context or jumping between systems.



Compliance & Audit Readiness

Documents are generated with HotDocs and stored directly on case records, supporting internal and external audits.



Scalability for Legal Teams

A combined approach supports high-volume legal work and complex document requirements without additional overhead.



Applications Across Case Management



Litigation Filings

Automate pleadings, motions, and standardized court documents



Claims Correspondence

Generate consistent letters, notifications, and status updates



Regulatory Notices

Produce compliance-driven communications quickly and accurately



Engagement & Intake Documents

Auto-create onboarding packets from structured case data



Case Summaries & Reporting Documents

Standardize how case data is presented internally or to stakeholders



Discovery or Evidence-Related Templates

Assemble repeatable forms and documentation tied to evidence records or disclosures



Wealth and Asset Management Documents

Generate trusts, estate-related documentation, and supporting materials



Probate and Family Law Documents

Produce court-ready filings, agreements, and standardized forms



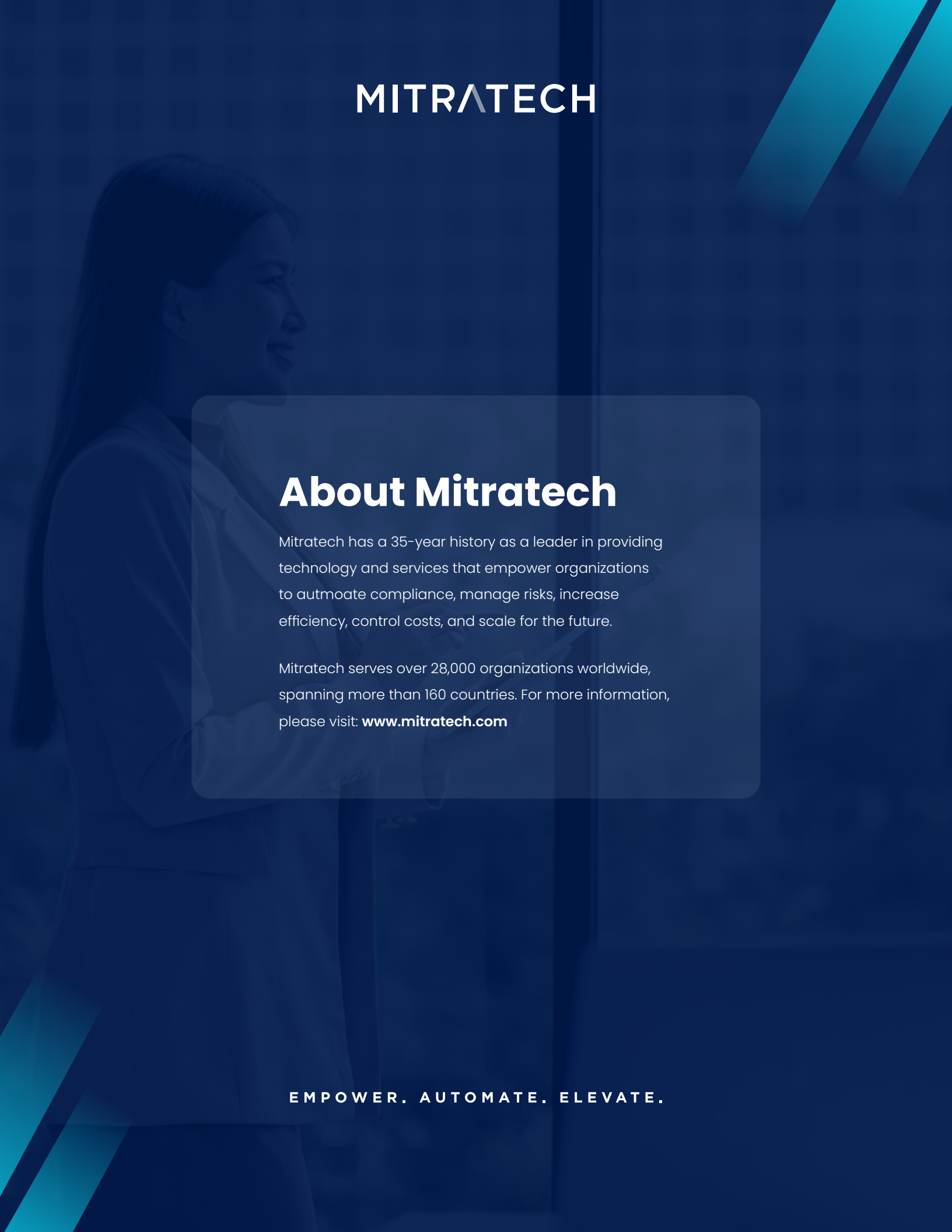
Property and Real Estate Case Documents

Create transaction documents, ownership records, and related filings



Tax-Related Case Documentation

Produce forms, notices, and supporting documents tied to tax matters



MITRATECH

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

EMPOWER. AUTOMATE. ELEVATE.