

CARET Legal

A Guide to Caret Legal Advanced Document Automation with HotDocs Advance

Document automation is a process by which you can create standard legal documents from a pre-established template. By integrating Caret Legal with HotDocs Advance, the process is streamlined, and your document production can be made more efficient.



HotDocs Advance Integration

With the integration of HotDocs Advance into Caret Legal, your document automation process becomes significantly easier. HotDocs Advance allows you to create sophisticated document templates that can be populated with the correct information automatically.

Generation of Multiple Documents

One of the biggest advantages of HotDocs Advance integration is the ability to generate multiple documents from the same template at once. This is particularly useful when you need to create multiple similar documents for different clients.

Saving and Using Answer Summaries

By using HotDocs Advance in combination with Caret Legal, you can save your answer summaries for future use. This feature makes it easy to populate future documents with the same information, reducing the time spent on data entry.

Previewing Your Document

Before finalizing and delivering your legal documents, Caret Legal's integrated HotDocs Advance allows you to preview the document. This feature ensures that all variable fields are correctly filled, and the formatting is as desired.

Using Interviews to Populate Variable Fields

The interview feature in HotDocs Advance is a unique and beneficial tool. This feature allows you to use a pre-set interview format to collect the necessary data, which then populates the variable fields in your documents.

Accessing and Utilizing the Document Templates Tab

The Document Templates tab in Caret Legal now features HotDocs templates. You can easily access these templates and their mappings in the firm settings. This feature ensures that your team has access to the most up-to-date and relevant document templates.

Creating Templates with HotDocs Author

HotDocs Author is a tool that allows you to create custom document templates in Word. These templates can be designed to meet your firm's specific needs and can easily be used to automate document creation.

Saving and Uploading Templates to Caret Legal

Once your templates are created in HotDocs Author, you can save them for upload to Caret Legal. This process is straightforward and ensures that your templates are available for use within your firm's document automation system.

Adding Variable Fields to Your Templates

The last step in document automation using Caret Legal and HotDocs Advance is adding variable fields to your templates. These fields are where the data collected from interviews or from saved answer summaries will be inserted in the documents.

For additional support and information, please contact our customer support team at 1-800-500-3627.