



**WSSFC 2025**

**Technology Track – Session 4**

# **Document Automation: Streamlining Your Workflow**

***Presenters:***

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## About the Presenters...

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## CONTENTS

|              |                                                                      |           |
|--------------|----------------------------------------------------------------------|-----------|
| <b>1.1</b>   | <b>What is Automation?</b>                                           | <b>1</b>  |
| <b>1.2</b>   | <b>Why is Document Automation Valuable?</b>                          | <b>1</b>  |
| <b>1.2.1</b> | <b>Automation Beats the “Cut and Paste” Method at Every Turn</b>     | <b>1</b>  |
| <b>1.3.1</b> | <b>Online Automation Options</b>                                     | <b>4</b>  |
| <b>1.3.2</b> | <b>Auto-Correction, Text Replacement and Text Expansion</b>          | <b>4</b>  |
| <b>1.3.3</b> | <b>Auto-Correction Online Resources:</b>                             | <b>5</b>  |
| <b>1.3.3</b> | <b>Text Expansion Tools</b>                                          | <b>6</b>  |
| <b>1.4</b>   | <b>Legos® for Windows</b>                                            | <b>8</b>  |
| <b>1.5</b>   | <b>Tools in Law Practice Management Software and Services (LPMS)</b> | <b>10</b> |
| <b>1.5.2</b> | <b>WORD ADD-INS</b>                                                  | <b>11</b> |
| <b>1.5.3</b> | <b>OTHER DOCUMENT AUTOMATION TOOLS</b>                               | <b>16</b> |
| <b>1.5.4</b> | <b>DOCUMENT AUTOMATION WITH AI</b>                                   | <b>17</b> |
| <b>1.6</b>   | <b>Document Automation Wrap-up</b>                                   | <b>17</b> |

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### Artificial Intelligence Disclosure

These continuing legal education materials were created with a bit of help from artificial intelligence (AI). By now, you’ve probably noticed AI is everywhere—drafting emails, summarizing depositions, and still trying (with mixed success) to write a good lawyer joke.

AI lent a digital hand in drafting, brainstorming, or polishing portions of these materials. But don’t worry—every section was reviewed, redrafted, approved, and properly “lawyered-up” by actual human attorneys. The brilliance you find is ours; any typos or weird turns of phrase we’ll happily blame on the robots (who, despite their progress, are still not licensed to practice law).

So, enjoy the ride, learn something useful, and rest assured: the only intelligence liable for CLE credit here is human.

## **1.1 What is Automation?**

What is document automation (also referred to as document assembly), and why do lawyers need it? Simply put, it is a way to assemble documents or populate documents with variable information, including names, dates, addresses, etc.

## **1.2 Why is Document Automation Valuable?**

Document automation saves enormous amounts of time, and as lawyers know all too well, time is money.

Lawyers, especially solo and small firm lawyers, face increasing competitive pressures from other lawyers and from non-traditional service providers that seem to be in a race to the bottom when it comes to fees. Service providers such as LegalZoom (which bills itself as providing “self-help services at your specific direction”), Rocket Lawyer, and others pose a significant threat to firms focused on the average consumer. These non-traditional service providers often charge less than a lawyer does for preparation of similar documents.

To compete against this pressure, you need to be practicing as effectively and efficiently as possible. One way to do so is to focus on gaining efficiencies in the preparation and production of documents you use on a regular basis in your practice. Once you streamline your document processes you may find that you have a lot of time left over to consider how you might compete by offering flat-fee services, or unbundled legal offering. These kinds of innovations will keep you competitive in the shifting legal landscape of consumer-driven legal services.

### **1.2.1 Automation Beats the “Cut and Paste” Method at Every Turn**

When it comes to preparing documents, too many lawyers simply reuse existing word processing documents; they open the old document, and then they go through and change the information each time they create a new one. Does this work? Yes. Is it a good idea? No. At some point this practice not only can end up embarrassing you but can lead to potential violations of the Rules of Professional Conduct.

This method leaves you vulnerable every time you create a new document. It is prone to human error. Anyone can be interrupted, distracted, moody, sick, overworked, under nourished, or over-cafeinated, all of which can lead to mistakes. Whereas, computers never suffer from these types of concentration-killers and can be counted upon to deliver the same work product every time.

As lawyers, our job is to get the paperwork right. We should not risk human error when automation is an easy and inexpensive alternative.

From a client-confidentiality perspective, automation makes sense as well. The cut-and-paste method leaves lawyers vulnerable to inadvertently disclosing client information by failing to take proper technological steps to protect the document.

Document automation protects you from unintended disclosures by making sure you don't inadvertently leave old client information in the new client's documents.

There are two types of data in a document to worry about. First, the obvious concern is that a lawyer might forget to delete old client data from the document that is being modified.

The second type of data to worry about is metadata. Metadata is the data in your document that is not visible on the document itself, but rather is the data about the document itself. It can include information that you may believe to be removed from a digital file but is instead merely hidden.

If you use automation, you don't need to worry about metadata or about leaving old client data in new client documents.

Let's consider an example of how document automation can affect creation of a very simple form, such as one I use regularly, the Illinois Statutory Short Form Power of Attorney for Property (POA):

The Illinois POA form requires that you provide the identity of the Principal, the Agent, a Successor Agent, and the Witness. You also can expand or limit the powers granted in the statutory form and provide for effective and termination dates other than signing and death. Document automation works best when you begin with simple documents and progress to more complex documents as you gain confidence with the process. For this discussion we will create a basic POA that is designed to work for a large number of basic POA needs and that will minimize the number of variables we need to change for each document. These variables are:

- Full name and address of the Principal
- Full name and address of the Agent
- Full name and address of any Successor Agent(s)
- Full name of the Principal in the Witness provisions

All other variables such as limitations or additions to the Agent's powers and the effective and termination dates are pre-completed with information that you use every time. As you gain confidence with your document automation capabilities, you can modify your form so that these variables are not fixed but will be created based on information you provide unique to the client.

So think about the options you are presented with above: The first option is to take a form from another client, search through it for prior client information, and then find and replace that prior client information; the second option is simply to enter the variables in a series of questions and then hit a button to generate the POA. Which is faster? Yes, this is a trick question—the second option will always be faster.

Faster in this instance translates into less time spent generating the document and fewer chances of including prior client information or otherwise making a mistake in the document. Spending less time creating the document translates into more effective use of your time and resources. Thus, you can make more money on a document, even if you charge less than you did previously because you've made the whole process more efficient.

Below are resources for information on how to create templates for forms in Word and iWork apps for Mac:

Save a Word document as a template: [bit.ly/1AEIneg](https://bit.ly/1AEIneg)

Create forms that users can complete or print in Word: [bit.ly/1AEIxCD](https://bit.ly/1AEIxCD)

### **1.3 How to Begin Automating Your Documents**

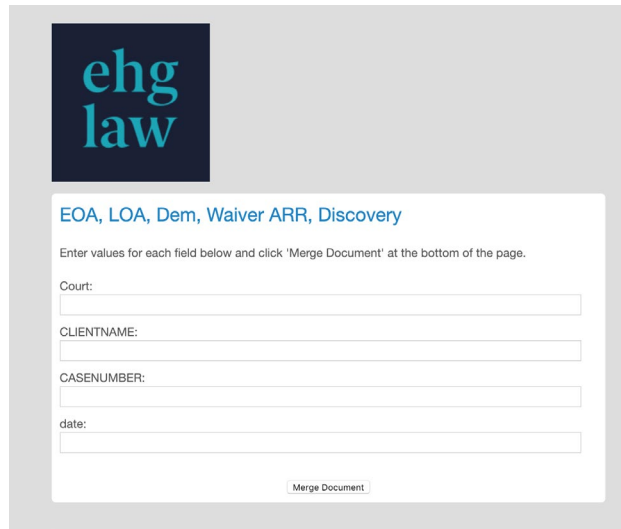
When it comes to document automation, you can get started with your existing software and leverage the tools that already exist in your Mac or PC. Or you can buy software to automate document creation that includes the ability to customize document phrases and clauses based on answers to questions or other logic placed in the template you create.

Automating a document can be as simple as creating a Word template that has certain language already completed, such as making our POA effective on signing, terminating on death, and with pre-defined terms for limitations such as the additional power of making gifts. You can then replace the variable information using simple substitution, such as using double chevrons <>, to identify information that needs to be added (the variable). Using this substitution, you can search and replace replaceable variables without worrying about leaving behind another client's details. A better option, in our opinion, is to use add-ins that allow you

to answer questions in a sterile document and create the document with the required variables inserted by the add-in.

### 1.3.1 Online Automation Options

If you are not a fan of Word's automation options, you can find online services that will automate your documents for you. Webmerge, Docmosis, and Active Docs Opus are three examples and you can find [more here](#). These services allow you to submit your client's information and will email the document directly to your inbox.

The image shows a web browser window displaying the 'ehg law' logo in the top left corner. Below the logo, the text 'EOA, LOA, Dem, Waiver ARR, Discovery' is displayed in blue. Underneath this, a small instruction reads: 'Enter values for each field below and click 'Merge Document' at the bottom of the page.' There are four input fields labeled 'Court:', 'CLIENTNAME:', 'CASENUMBER:', and 'date:'. At the bottom right of the form area is a button labeled 'Merge Document'.

One of the advantages of this is that you don't need to be using your work computer to generate the documents but rather can prepare the documents from any internet-enabled device, including your phone or someone else's device without jeopardizing the confidentiality of your client's information.

### 1.3.2 Auto-Correction, Text Replacement and Text Expansion

One of the easiest ways to start automating document creation is to use the tools such as text expansion or text replacement.

With text expansion or replacement, you type a special word, series of letters, or characters, and it is replaced with something else, such as a name, phone number, phrase, or even an image. Although there are third-party text expansion programs, you can easily get started using the auto-correction feature built into programs such as Word or Outlook, or that are included in your operating system such as iOS and macOS.

You may be wondering, what is auto-correction? Open your word processor of choice and deliberately misspell a word as you type. For example, type "teh" in Word and hit the spacebar,



Word automatically changes “teh” to “the.” In other words, Word automatically corrects your misspelling. This is auto-correction of text.

Many auto-correction tools include preconfigured words and characters for the most common misspellings, while others provide a few examples and let you create your own (as in iOS). But their usefulness does not stop with simply correcting misspelled words: You can add your own words and corrections to those that are preconfigured. This allows you to start automating document creation using existing tools.

If you find yourself typing the same text over and over again, such as a signature block or a phrase, use the auto-correction feature of your program to automatically insert that language when you use the abbreviated text you assign to that language in the autocorrect feature. For example, you can elect to add “vty” to your auto-correction tool and have it replace those three letters with a signature block such as:

Very Truly Yours,

Nerino J. Petro, Jr.  
Attorney at Law

Or add “wfr” to the auto-correction tool and have it replace these letters with:  
I will await your response.

### **1.3.3 Auto-Correction Online Resources:**

Here are just a few of the online resources on how to use auto-correction for text expansion and replacement:

- Use Microsoft Word's AutoCorrect feature to expand text: <http://bit.ly/1JLbiSp> and <http://bit.ly/2rmKiU8>
- In praise of text expansion (or, how to keep from typing the same thing 100 times): <http://bit.ly/1JLbqBk>
- How to set up text substitution in Pages: <http://cnet.co/2cJuKWa>
- Share Custom AutoCorrect Entries with Other Computers and Users: <http://bit.ly/2jvUuFo> and <http://bit.ly/2rosPdW>

Although the built-in tools provide basic features, the built-in tools also have limitations such as the inability to work in other programs without re-entering the information again. For example,

the autocorrect shortcuts you create in Word will need to be re-entered into Outlook. A better option is to use third-party programs specifically designed as text expansion tools for even greater functionality. These text-expansion tools allow you to create canned email responses, navigate menu commands such as the Save dialog in a program, and create multiple signature blocks, entire clauses or sections for a document, and much more. These third-party tools generally provide greater choices concerning the formatting of the text, how much text you can include, and even what actions are taken when you use the tool. They also allow you to create your shortcuts and use them across multiple programs without having to re-enter them in each program. The following list (which is not all-inclusive) provides examples of text expansion apps and programs available for your various devices.

### 1.3.3 Text Expansion Tools

#### Windows

- ActiveWords: <http://activewords.com>
- AutoHotkey: <http://autohotkey.com>
- Breevy: <http://16software.com/breevy>
- PhraseExpander: <http://phraseexpander.com>
- PhraseExpress: <http://phraseexpress.com>

#### macOS

- aText: <http://trankynam.com/atext>
- TextExpander: <http://smilesoftware.com/TextExpander/index.html>

#### iOS:

- Typelt4Me Touch <https://ettoresoftware.store/ios-apps/typeit4me-touch/>
- Typinator: <http://ergonis.com/products/typinator>

#### Android:

- Texpend: <http://bit.ly/1HD9W55>
- Text Expander: <https://bit.ly/3KqIXHl>

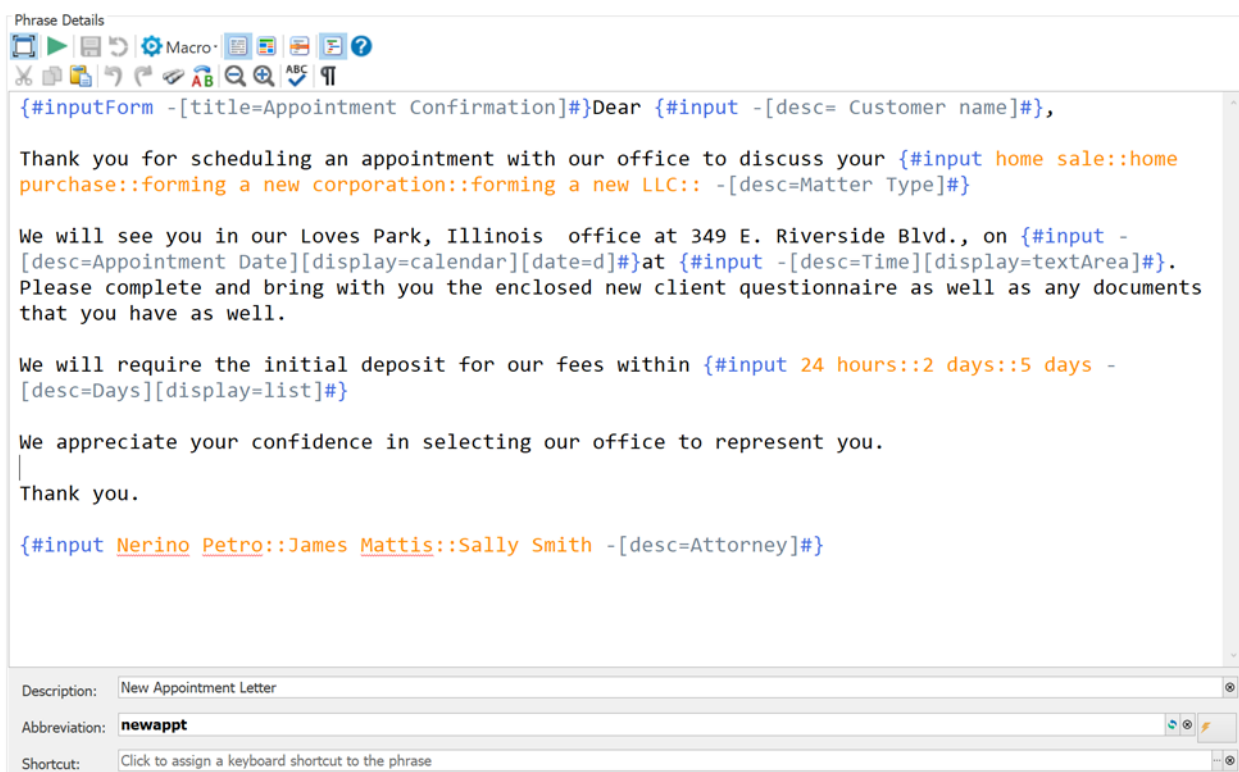
#### Articles on Text Expansion Tools:

- 9 Best Text Expander Apps for Windows (Free and Paid): <http://bit.ly/2rnyO2V>
- 3 Windows text expanders that take the tedium out of typing: <http://bit.ly/2jxp6qi>
- Best Text Expander apps for macOS: <http://bit.ly/2jB3Xv7>

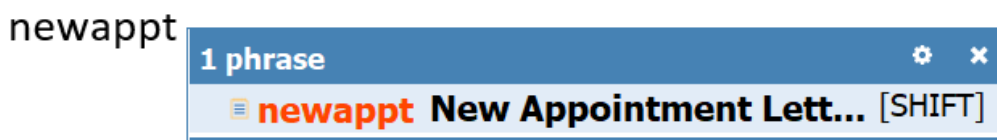
Although some of the above tools may be more full-featured or offer different capabilities, they all provide basic text expansion that will work with multiple apps and software programs on

your device. Also note that Mac OS X, iOS, and some versions of Android include native text expansion. For more in depth reviews: check out Wells H. Anderson's review of PhraseExpress at <https://bit.ly/4mG8Ct1>; Brooks Duncan of DocumentSnap's write-up of ActiveWords at <http://bit.ly/2jvBmYh> ; and 9to5Macs review of TextExpander at <http://bit.ly/2wm6Aum>).

To give you some idea of the capabilities of these third-party programs, many of them include the ability to use macros to do more than just expand text. For example, using PhraseExpander, you can create a text expansion snippet that, when triggered, will allow you to select from drop down lists or from multiple options to complete a document such as a new engagement letter. The snippet you create would appear as shown here:



Inside Word, when you type “newappt” you get the snippet popup as shown in this image:



When you hit the Shift key to trigger the snippet, you will open a dialog box like this:

Appointment Confirmation

Customer name

Matter Type

- home sale
- home purchase
- forming a new corporation
- forming a new LLC

Days

- 24 hours
- 2 days
- 5 days

Attorney

Nerino Petro

OK Cancel

You can then type in the client's name, select the type of matter from the drop-down list, enter the date and then the time for the appointment. Then select the number of days for payment of the initial fee and then select the attorney from the drop-down list.

You will end with a document that looks like this:

Dear Tanya Smith,

Thank you for scheduling an appointment with our office to discuss your home purchase.

We will see you in our Loves Park, Illinois office at 349 E. Riverside Blvd., on Thursday, January, 31, 2019 at 2:00PM. Please complete and bring with you the enclosed new client questionnaire as well as any documents that you have as well.

We will require the initial deposit for our fees within 2 days.

We appreciate your confidence in selecting our office to represent you.

Thank you.

James Mattis

## 1.4 Legos® for Windows

If you want to be able to create standard clauses, pleading headers, notary or witness provisions, etc., and be able to save those to designated categories (e.g., real estate, wills, family law), take a look at Microsoft Quick Parts. Quick Parts consist of several different parts and are referred to as Building Blocks in Word and Outlook. Quick Parts (see <https://tinyurl.com/mpjupkcw> ) is an extremely easy to use tool contained within Microsoft Word since the 2007 version.

As Jim Calloway and Diane Ebersole have explained:

Quick Parts allows you to build a library of “parts” just like the name implies. These parts can be a short phrase, a signature block, or text that is several pages long. Creating Quick Parts is very simple. Select the text you want to turn into a Quick Part, click on the Insert tab followed by the Quick Parts icon, and “Save selection to the Quick Parts Gallery.”

It is strongly suggested that no matter how sophisticated a document assembly program one might have, the built-in tools of Microsoft Word—particularly AutoCorrect and Quick Parts—should be used to insert items very quickly like a pleading signature block or to generate short routine documents like a fax cover sheet. This operation can be done in just a couple of clicks of the mouse without ever invoking the more powerful word processing and document assembly programs. ... A particular advantage of Quick Parts is that it works in Microsoft Outlook as well, allowing the lawyer to use sophisticated document assembly techniques in e-mails. (Excerpted with permission from “[Magic in Minutes—Effective Use of Document Assembly](#)” by James Calloway and Diane Ebersole, updated by Diane Ebersole, Law Practice Today, September 2012.)

Using Quick Parts, you can “build” your document from clauses or substitute a Quick Part for a standard existing clause in a template. Quick Parts provide more flexibility in formatting and the amount of text captured than Word’s AutoCorrect feature. Checkout [Microsoft’s Office Support page](#) on Quick Parts for a good overview. One downside to Quick Parts is that, by default, Word and Outlook keep all your Quick Parts in a single location (e.g., all your family law Quick Parts would be found in the same list as all of your real estate Quick Parts). Luckily, you are not forced to keep them all in the same place and can change this default action.

Here are a number of articles on dealing with this conundrum:

- Share custom Word building blocks with anyone: <http://tek.io/1d8eNmZ>

There also are numerous general online resources on using Quick Parts, including:

- How To Create Custom Quick Parts In MS Word: <http://bit.ly/2HXS9xV>
- Microsoft Support site guide to Quick Parts: <http://bit.ly/1I6OOZI>
- How to create or insert quick parts (reusable entries) in Outlook: <http://bit.ly/1I6Pa23>
- Add, modify, and delete Quick Parts: <http://msoutlook.info/question/93>
- Fun with Microsoft Word Quick Parts: <http://youtube.com/watch?v=RI6lIUpgo6M>

If you search the Internet on how to use Quick Parts, you will find many more resources than the few we’ve listed above.

## **1.5 Tools in Law Practice Management Software and Services (LPMS)**

Most practice management software includes differing levels of document automation.

With document automation templates in these products, users generally upload a template in Word, Pages, or PDF format. Then using field codes provided by the software or service, users can import variable data from the software or service to create the document. Generally, these features rely on set templates based on built-in logic and with no alternative clause selection or substitutions, except in some of the desktop products. Check your practice management training pages to see what is available to you. If you are shopping for a practice management service, ask to see this capability.

### **1.5.1 MYCASE (and others)- AN ILLUSTRATION OF LPMS DOCUMENT AUTOMATION**

MyCase has some very neat tools that take the drudgery out of document assembly. Essentially, you can create document templates, then merge those templates with information stored in the system.

MyCase templates are simple to build either in Word or directly within MyCase through the MyCase Draft feature. Users can build firm-specific templates that integrate with custom information fields pulled directly from client and case files to quickly create completed documents without the need for cutting and pasting pieces of information throughout the entire document, reducing the risks of oversight and error.

The key to creating robust templates in MyCase is the utilization of custom information fields. Custom fields are used to keep track of important case and client information. Items as general as client names, case numbers, billing rate and important dates can be assigned to specific contacts and matters. Users also can create custom information fields depending on what the firm finds useful and important. For example, an estate planning firm can create custom fields for personal representatives, healthcare agents, guardians, family members, trust distribution ages, and any other information that may be commonly relevant for all cases. Custom fields can then be integrated into MyCase templates to create completely customized documents ready for presentation to the client.

The tools in MyCase are like the tools found in the other cloud-based practice management solutions. The key is using the merge fields provided by your practice management system in your document. Here is an example of a very simple letter for Clio using the information from a Clio Client record:

<< Date >>

<< Matter.Client.Prefix >> << Matter.Client.Name >>

<< Matter.Client.Address >>

*RE: << Matter.Number >> << Matter.Description >>*

Dear << Matter.Client.FirstName >>

Thank you for choosing our firm to represent you. We appreciate the trust you have placed in us and look forward to working with you and have opened your file as of << Matter.OpenDate.Verbose >>.

Enclosed you will find a copy of the representation agreement you signed, which outlines the scope of our work and the terms of our representation. We will begin work on your matter right away and will provide you with regular updates—at least every 30 days, and sooner whenever there are significant developments.

If you have any questions or concerns at any time, please do not hesitate to reach out. We are here to guide you through this process and ensure you are well informed at each step.

We value the opportunity to serve you.

Sincerely,

<< Matter.OriginatingAttorney >>

Clio recognizes the fields enclosed by the double chevrons and specific merge field names to pull information from within Clio's database to merge into the Word document.

### **1.5.2 WORD ADD-INS**

Word add-ins are designed to integrate directly into Microsoft Word to extend its capabilities with document assembly and automation tools. While they may not be as feature-rich or customizable as dedicated, stand-alone products like HotDocs, these add-ins strike an appealing balance: they deliver many of the same functions at a fraction of the cost and complexity. This makes them far easier to set up, learn, and use in a typical law office. Two notable examples in this category are Pathagoras and TheFormTool/Doxserá.

Pathagoras (<https://www.pathagoras.com/>) is particularly well suited for lawyers and small firms looking to begin automating documents without investing months of setup time. What sets Pathagoras apart is its 'plain text' approach to document automation. Instead of relying on complicated coding, field codes, or scripting, Pathagoras lets you mark variables by simply placing square brackets around text. Inside the brackets you type the variable name, which acts as a placeholder for the information that will later be merged into the document. This allows you to take your existing Word documents and quickly transform them into automated templates. For example, a simple engagement letter can be converted into a template by bracketing variable text. Once these placeholders are in place, Pathagoras will prompt you to fill in the values when generating the final document. You do not need to rebuild templates from scratch: if you already have a form letter, contract, or pleading that you regularly reuse, you can open the file, bracket the variable portions, and instantly convert it into an automated template. Even better, Pathagoras includes a 'Create Variables Assistant' that can scan the document for repeated words or names—such as a company name that appears multiple times—and replace all of them at once with a variable. This saves enormous time and reduces the risk of missing an instance. Pathagoras also goes beyond simple variable replacement. It includes an 'Instant Database System' that allows you to save the values you've entered for future use. If you create multiple documents for the same client, you can reuse that client's information without re-entering it every time. For more advanced users, Pathagoras supports 'Interviews,' which guide you through a series of prompts or questions, letting you choose among alternate clauses, provisions, or options. With this feature, you can assemble highly tailored documents such as contracts, wills, or leases.

Pricing is straightforward and competitive. Pathagoras starts at \$379 for the first user (with discounts for additional users) and includes a one-year maintenance plan. Monthly and semi-annual subscription options are also available. Pathagoras provides a free trial of 90 days, making it easy for firms to test the software before committing.

Overall, Pathagoras exemplifies the benefits of Word add-in automation tools: it is affordable, requires minimal technical knowledge, leverages documents you already have, and provides enough flexibility to serve both beginners and advanced users. For lawyers seeking to dip their toes into document automation without getting lost in programming or complex setup, Pathagoras is a practical, user-friendly choice.

## Example: Pathagoras in Action

The following table shows a side-by-side comparison of a Pathagoras template with variables and the final generated document after automation.



| Template with Variables (before automation)                                                                                                                                                                                                                                                                                                                                                                                                                                   | Generated Document (after automation)                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| [Date of Letter]<br>[Client Name]<br>[Client Address]<br>[Client City], [Client State] [Client Zip Code]<br><br>RE: [Matter Description]<br><br>Dear [Salutation]:<br><br>Thank you for retaining our firm in connection with [Matter Description]. We have agreed to represent you at an hourly rate of \$[Hourly Rate]. Please forward your initial retainer of \$[Retainer Amount] by [Payment Method].<br><br>Very truly yours,<br><br>[Attorney Name]<br>[Law Firm Name] | September 18, 2025<br>Jane Doe<br>123 Main Street<br>Springfield, IL 62704<br><br>RE: Purchase of 456 Oak Avenue<br><br>Dear Ms. Doe:<br><br>Thank you for retaining our firm in connection with the purchase of 456 Oak Avenue.<br>We have agreed to represent you at an hourly rate of \$250.00.<br>Please forward your initial retainer of \$2,500.00 by check.<br><br>Very truly yours,<br><br>Nerino J. Petro<br>Petro & Associates, P.C. |

**TheFormTool** (<http://theformtool.com>) and its sister product **Doxserá** are also Word add-ins. TheFormTool helps you create what it calls “smart forms” using a two-step process: Step One is to create a Q&A table that asks questions of the form preparer, and Step Two is to add fields to the form where the answers from the Q&A table are placed in the form. Unlike Pathagoras, you do not simply place brackets around a name to create the variables. However, in some ways TheFormTool method of document automation—with its ability to add complex logic and nested variables—provides more powerful tools than Pathagoras. It also allows you to create easy-to-understand questions for the document preparer to answer, along with the ability to add reminders or descriptive information for each field in the Q&A table.

To use TheFormTool to create the same simple letter we created above with Pathagoras, you first create your Q&A table (see Figure 1 below). The labels here have been placed in the order they appear in the sample letter. If you prefer to group them together putting critical information first—such as names and addresses followed by dates and other information—you can do so. TheFormTool provides video tutorials and help guides on how to do this on its website. Further, their written documentation is detailed and excellent.

| TheFormTool™ (c) 2011-2015 Snapdone, Inc. |                                                                              |        |
|-------------------------------------------|------------------------------------------------------------------------------|--------|
| Label                                     | Question                                                                     | Answer |
| LtrDate                                   | What is the date of the letter?<br>(Format: m/d/yy)                          | [?]    |
| ClientName                                | What is the Client's Name?                                                   | [?]    |
| ClientAddr                                | What is the Client's address?                                                | [?]    |
| ClientCity                                | What is the Client's City?                                                   | [?]    |
| ClientState                               | What is the Client's State?                                                  | [?]    |
| ClientZip                                 | What is the Client's zip code?                                               | [?]    |
| LtrRegarding                              | What is the letter regarding?                                                | [?]    |
| ClientSal                                 | What is the name you call the Client?                                        | [?]    |
| AdvFee                                    | What is the amount of the advanced fee due?<br>(Don't type \$)               | [?]    |
| SendMethod                                | What is the delivery method of the documents?<br>(3 Choices: UPS/Fedex/USPS) | [?] -  |
| AttyName                                  | Name of the attorney signing the letter                                      | [?]    |

Step two is to put in your fields in the document, which ends up looking like this:

{LtrDate}

{ClientName}

{ClientAddr}

{ClientCity}, {ClientState} {ClientZip}

RE: {LtrRegarding}

Dear {ClientSal}:

Thank you for returning your signed representation agreement and advanced fee of \${AdvFee}. We will be sending you the completed documents by {SendMethod} when complete.

Very truly yours,

{AttyName}

| TheFormTool™ (c) 2011-2015 Snapdone, Inc. |                                                                              |                      |
|-------------------------------------------|------------------------------------------------------------------------------|----------------------|
| Label                                     | Question                                                                     | Answer               |
| LtrDate                                   | What is the date of the letter?<br>(Format: m/d/yy)                          | 6/1/15               |
| ClientName                                | What is the Client's Name?                                                   | Mary C. Smith        |
| ClientAddr                                | What is the Client's address?                                                | 800 N. Church Street |
| ClientCity                                | What is the Client's City?                                                   | Rockford             |
| ClientState                               | What is the Client's State?                                                  | IL                   |
| ClientZip                                 | What is the Client's zip code?                                               | 61103                |
| LtrRegarding                              | What is the letter regarding?                                                | Preparation of Deed  |
| ClientSal                                 | What is the name you call the Client?                                        | Mary                 |
| AdvFee                                    | What is the amount of the advanced fee due?<br>(Don't type \$)               | 500.00               |
| SendMethod                                | What is the delivery method of the documents?<br>(3 Choices: UPS/Fedex/USPS) | UPS                  |
| AttyName                                  | Name of the attorney signing the letter                                      | Nerino J. Petro, Jr. |

You next fill in the “Answers” on the Q&A table (see Figure 2 above). Finally, you click the Fill button in TheFormTool toolbar on the Word ribbon, which results in the following:

June 1, 2015

Mary C. Smith  
800 N. Church Street  
Rockford, IL 61103

RE: Preparation of Deed

Dear Mary:

Thank you for returning your signed representation agreement and advanced fee of \$500.00. We will be sending you the completed documents by UPS when complete .  
Very truly yours,

Nerino J. Petro, Jr.

One advantage that TheFormTool has is that for each label, you can include an explanation of what the answer should be. This can help guide the person who is completing the form.

TheFormTool has been joined by Doxserá and Doxserá DB, which is its cloud-based sibling. Doxserá adds the ability to populate multiple documents simultaneously using the same Q&A table. TheFormTool offers a free version that has basic functionality so that you can try it and see if it will work for you. The free version is yours to keep. If you like TheFormTool and want to

get even greater functionality, TheFormTool Pro is \$89 per user for a lifetime license. Doxserá is \$169 per user per year. Doxserá DB is \$279 per user per year. Several bar associations offer member discounts. For a full comparison of the features of the different versions of TheFormTool software, see the comparison chart at <https://www.theformtool.com/support/comparison/>. TheFormTool offers Elder Law and Business Law form libraries with a number of affiliates and publishers offering form libraries and conversion of our own forms. See <https://www.theformtool.com/affiliates/>.

### 1.5.3 OTHER DOCUMENT AUTOMATION TOOLS

There are other desktop and cloud-based document automation tools. Check out **“Take Your Practice to the Next Level with Document Automation Tools**

Authored by Danielle DavisRoe over at Attorney at Work. Many of these such as HotDocs (<http://hotdocs.com>), XpressDox (<http://xpressdox.com>), to name just a few, are more powerful than Pathagoras and TheFormTool/Doxserá. Some are free-standing tools that run on their own, outside of Word. However, with that power comes greater complexity, higher purchase and deployment costs, a steeper learning curve, and the need to employ a consultant to get the most from the product. Companies that assist with these types of products and deployments include Basha Systems (<http://bashasys.com>) and Capstone Practice Systems (<http://capstonepractice.com>).

There are also premium subscription-based services available, typically delivered online. These solutions provide standard document language, clauses, and terms that are bundled with the document assembly process. These solutions generally focus on a specific practice area, and you pay for the well-drafted clauses and documents as well as the speed and efficiency of the document assembly process itself. Some examples of these would include: AIA Contract Documents by the American Institute of Architects (<http://bit.ly/1GOZNWX>), and WealthDox from WealthCounsel for estate planners (<https://bit.ly/4glqkKV>). Leaflet Corporation (<http://www.leafletcorp.com/>), Like Pathagoras and TheFormTool it is a Word add-in, but it goes beyond that. Billing its product as “collaborative document automation,” Leaflet provides capabilities including Q&A tables (called Leaflet Interviews and also Word questionnaires), which can be placed on your website for clients to complete online or that you can share, electronic signatures, and more.

There are several other products that can be used for document automation. The following is not an all-inclusive list but provides information on some of the products that are available:

- Docasaurus: <http://docasaurus.com>
- draftonce: <http://draftonce.com>
- Westlaw Doc & Form Builder: <http://tmsnrt.rs/1GP1Vy2>
- <http://zumeforms.com/>

#### **1.5.4 DOCUMENT AUTOMATION WITH AI.**

Of course, no discussion on document automation would be complete without at least mentioning Artificial Intelligence (AI) otherwise known as LLM's (Large Language Models) .

Check out this page from the University of Arizona for more information on LLMs

<https://bit.ly/4mG2GQC>.

Legal Document AI is a bit different than the way you may think of document automation itself: these products often include review of existing documents - analyzing the document for issues from different party perspectives, specific clauses and catch risks. They can also generate draft language and documents. While not document automation in the traditional sense (pulling in information to assemble a document based on a template such as Pathagoras or Clio). Even non-legal AI can be used such as ChatGPT (<https://chatgpt.com/>) . Examples of these products include Spellbook (<https://www.spellbook.legal/>) and Gavel (<https://www.gavel.io/>) which are legal-specific products and FormStack Documents (<https://www.formstack.com/products/documents>), which, while not legal specific, is another example of how these solutions are developing.

#### **1.6 Document Automation Wrap-up**

There is no reason for lawyers and their staff not to take advantage of today's document automation tools. These tools exist for every need and at every price point, ranging from the free and basic to the expensive and complex. The improved efficiency and effectiveness these tools bring to the legal practice will not only reduce potential embarrassment and malpractice but will have a direct and positive impact on the bottom line.