THE AUTOMATED ATTORNEY

Zapier Court Form
Auto-Drafter — Build Guide

A trigger-by-trigger blueprint for a Zap that pulls matter data from your CRM, populates standard court forms, and drops review-ready PDFs into the right matter folder.

Edition 1.0 • Build time: ~2 hours

Before You Start

This is a build guide, not a plug-and-play Zap: Every firm's CRM fields, court form layouts, and jurisdiction requirements differ. This guide gives you the exact structure — triggers, steps, and field-mapping logic — to build the automation yourself in about two hours. No Zap templates or court forms are included.

What you'll need:

- A Zapier account (the Professional tier or higher, since this Zap uses multi-step paths and formatter actions).
- A CRM or practice management tool with a Zapier integration that exposes matter fields via API (e.g. Clio, Lawmatics, MyCase, or a Google Sheet as a lightweight stand-in).
- A document generation step — either Zapier's built-in Formatter + a Google Docs/Word template with merge tags, or a dedicated doc-automation app (e.g. Documint, PandaDoc, or Formstack Documents) connected to Zapier.
- Your jurisdiction's official court form as an editable template with merge fields marked (see Part 2).

Part 1 — The Zap Architecture

Before opening Zapier, sketch this five-step flow. Every court-form Zap follows the same shape regardless of which specific apps you use:

Step	Zap component	What it does
1	**Trigger**	A matter record is updated in your CRM to a status that means "ready to file" (e.g. Status = Filing Ready).
2	**Filter**	Only continue if the required fields (party names, case number, hearing date) are actually populated — this prevents half-built forms.
3	**Formatter**	Clean up the data: format dates into the court's expected format, convert names to proper case, and build any combined fields (e.g. full case caption).
4	**Document Generation**	Merge the formatted fields into your court form template to produce a filled PDF.
5	**File & Notify**	Save the PDF to the correct matter folder (Google Drive/Dropbox/SharePoint) and notify the assigned attorney via Slack or email that it's ready for review.

Part 2 — Prepare Your Court Form Template

This is the step most guides skip, and it's the one that determines whether the Zap actually works.

2.1 — Get a clean, fillable version of the form

Start from the court's official form, not a scanned copy. If the court only provides a scanned PDF, recreate the form as an editable Google Doc or Word document with the exact same layout and language — courts generally accept a matching reproduction as long as content and format aren't altered.

2.2 — Mark merge fields

In your Google Doc/Word template, replace every variable piece of information with a clearly named merge tag in double curly braces, matching the field names in your CRM as closely as possible. For example:

- {{plaintiff_full_name}}
- {{defendant_full_name}}
- {{case_number}}
- {{court_county}}
- {{hearing_date}}
- {{filing_attorney_name}}
- {{filing_attorney_bar_number}}

> **Tip:** Keep a single master spreadsheet mapping every merge tag to its exact source field name in your CRM. You'll paste this directly into the Zap's field-mapping step in Part 4, and it becomes your reference when you add a second form later.

Part 3 — Build the Trigger and Filter Steps

3.1 — Trigger step

1. In Zapier, create a new Zap and choose your CRM as the trigger app.
2. Select the event that fires on a status change (e.g. "Updated Record" or "New/Updated Matter").
3. Connect your account and select the specific pipeline/matter type this Zap should watch.
4. Test the trigger against a real (or test) matter record so Zapier has sample data to map from in later steps.

3.2 — Filter step

Add a Filter by Zapier step immediately after the trigger. Configure it to only continue if:

- Status (Text) Exactly matches "Filing Ready"
- Case Number (Text) Exists
- Hearing Date (Text) Exists

This prevents the Zap from generating a half-blank form when a matter is moved to the right status before all fields are filled in.

Part 4 — Format Fields and Merge the Document

4.1 — Formatter by Zapier steps

Add one Formatter step per transformation needed. Common ones for court forms:

- Date/Time → Format: convert the CRM's raw date into the court's required format (e.g. MM/DD/YYYY).
- Text → Capitalize: ensure party names are in proper case regardless of how they were entered.
- Text → Combine: build a full case caption field by joining plaintiff name, "v.", and defendant name into one string.

4.2 — Document generation step

Add your document-generation app's action (e.g. "Create Document from Template"). Connect it to the template you prepared in Part 2, and map each merge tag to the corresponding output from your trigger and formatter steps using your mapping spreadsheet from Part 2.2.

> **Test thoroughly:** Run this step against at least three different test matters with varied data (a long case caption, a party with a suffix like "Jr.", a missing middle initial) before trusting it on a real filing.

Part 5 — File the Document and Notify the Attorney

5.1 — Save to the matter folder

Add a step for your file storage app (Google Drive, Dropbox, or SharePoint). Set the destination folder dynamically using a matter ID or client name field from the trigger, so each generated form lands in the correct existing matter folder rather than a single dumping-ground folder.

5.2 — Notify for review

Add a final step to Slack or email that notifies the assigned attorney (using the CRM's "Assigned Attorney" field from the trigger) with a direct link to the generated file and the matter name. Include a clear subject line, e.g. "Court form ready for review — [Client Name]."

> **Guardrail:** This automation should always produce a document for attorney review — never for direct e-filing without human sign-off. Build the notification step so it reads as a review request, not a confirmation that the form has been filed.

Part 6 — Testing Checklist Before Going Live

- Run the full Zap end-to-end on at least 3 test matters with different data shapes (short name, long name, missing optional field).
- Confirm the generated PDF's formatting matches the official court form exactly — margins, font, and field placement.
- Confirm the Filter step correctly blocks a matter that's missing a required field, rather than generating a broken form.
- Confirm the file lands in the correct matter folder, not a generic default folder.
- Confirm the attorney notification includes a working link and fires only once per matter (add a Zapier "Only Once" step or a status-flip-back step if you see duplicates).
- Have a licensed attorney review at least 5 real, non-test outputs before turning off manual drafting for this form type.

Need this built for you? If you'd rather we build and test this Zap directly against your firm's CRM and court forms, book a firm audit at taa.partners/consulting.