FOR CONSUMER BANKRUPTCY FIRMS

Court notices and client paperwork reach the case file without anyone typing them in.

Two tools, built for and running at a US consumer bankruptcy firm since August 2026.
Staff only look at the few items the tools aren't sure about.

Court notices

Before: staff read about a thousand notices a month and typed the dates in. The Outlook rules meant to help caught 2 of 99 case closings.

- Reads every notice the courts email, as it arrives.
- Pulls out case number, filing date, trustee, 341 meeting, confirmation hearing, discharge and closing.
- Finds the client by case number, or by name for a new filing.
- Fills only what is missing. It never overwrites what staff entered.

≈1,000 notices read a month

97% matched staff's own records

≈24 h of staff time saved a month

Client paperwork

Before: staff opened every client email, worked out what each file was and whose case it was for, saved it and ticked it off.

- Watches the inbox clients already email. Nothing changes for them.
- Opens ZIPs, phone photos and password-protected PDFs, and splits combined PDFs.
- Names each document: paystub, bank statement, tax return, ID and the rest you track.
- Files it in the client's folder and marks it received on the case checklist.

1,886 documents filed in the first two months

62 set aside for a person to decide

≈38 h of staff time saved a month

HOW WE START

1. **15-minute call.** Your case volume, your case system, your mailbox.
2. **Setup in your own accounts**, fitted to the documents and dates you track.
3. **Two-week pilot.** The tool proposes, your staff approve, and we compare it with what they would have done.
4. **Then it runs on its own**, with monthly support and a check-in.

SAFETY

Runs in your accounts: your email, case system and file storage.

Every write is logged with what changed and why.

Unsure items go to a person, never a guess.

A pause button, and tests that block any update that fails them.

Works with: Salesforce today. Other case systems and Microsoft 365 or Google mail are checked on the first call.
See it working: casefileautomation.com · **Book a 15-minute call:** calendar.app.google/SN48dpFZ4Ykuf5ej7

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Figures from the tools' own logs at that firm: documents 29 Jul to 28 Sep 2026; notices from the first two weeks live (14 to 28 Sep 2026), the 97% from a test against three months of the firm's past notices. Time saved is an estimate: about 2 minutes per document and 2 per email; 1 minute to read a notice and 3 to type an update.