

Your Guide to Auto-Fill Documents



What are Auto-Fill Documents:

Auto-Fill Documents allow you to turn your recorded conversations into structured documents **automatically**.

Upload a template (like a performance review form, occupational health assessment, or call summary) before or after your conversation, and Caption.Ed will populate it with the relevant information from your transcript.

In simple terms: Instead of spending 15–20 minutes after each meeting manually writing up notes in your company's format, Caption.Ed does it for you in seconds.

A Quick Example:

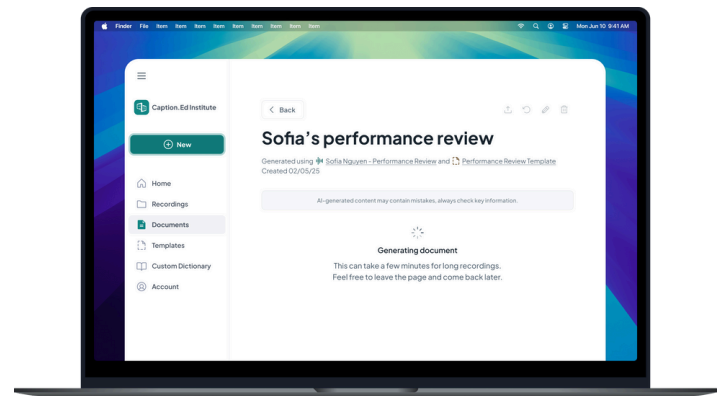
Imagine you're conducting a performance review. You have a standard template with sections for goals discussed, feedback given, and development plans that you need to go through with each team member.

Instead of:

1. Having the conversation
2. Reading through the transcript
3. Copying relevant bits into your template
4. Formatting and tidying everything up

You simply:

1. Upload your template to Caption.Ed
2. Have the conversation as normal
3. Get your completed document automatically



Why We Built This:

Having an accurate transcript of your conversations is valuable, but we heard from many of our customers that there was still a gap between capturing the conversation and actually using that information in your day-to-day work.

If you need to fill in forms, write up reports, or document conversations in a specific format, you are still spending significant time on administrative work after each meeting. Auto-Fill Documents bridges that gap.

The problem we're solving:

- Time spent on post-meeting admin
- Inconsistent documentation across your team
- Important details being missed or forgotten
- The mental load of note-taking during conversations

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Benefits:

Save time on administrative work

What typically takes 15–20 minutes of manual work now takes seconds. If you're having multiple conversations each week that need documenting, those hours add up quickly.

Stay focused on the conversation

When you know Caption.Ed is capturing everything and will structure it for you afterwards, you can give your full attention to the person you're speaking with rather than worrying about taking notes.

Capture complete information

Nothing gets missed between the conversation and your documentation. All the key points, decisions, and action items are captured accurately.

Maintain consistency

Everyone on your team documents conversations in the same format, every time. This is particularly valuable when you need to:

- Hand over information to colleagues
- Maintain compliance records
- Track conversations over time
- Report to management

Common use cases:

Auto-Fill Documents work best when you have structured conversations that need to be documented in a consistent format.

Here are some examples:

Team Meetings

- One-on-ones with direct reports
- Performance reviews
- Sprint planning and retrospectives
- Daily stand-ups

Customer-facing conversations

- Discovery calls
- Customer feedback sessions
- Account reviews
- Support call summaries

Internal documentation

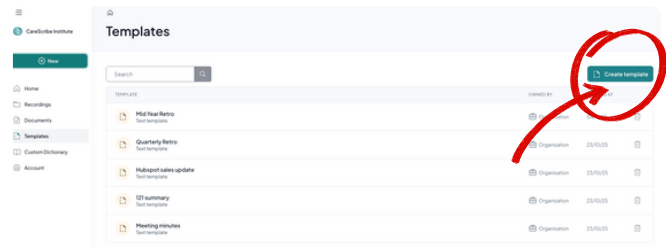
- Interview debriefs
- Project briefings
- Case notes
- Assessment reports

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Getting Started:









1. Upload your template

Use a template you already have – a Word document, PDF form, or structured note format. Upload it to your template library as a PDF or text file.



2. Record your conversation

Template uploaded? Start recording your conversation in Caption.Ed, whether that's in-person or online.

TEMPLATES	OWNED BY	CREATED
 Return to Work form PDF template	 Organisation	10/04/25
 Performance review template Text template	 @ You	04/04/25
 121 summary Text template	 @ You	24/03/25
 Weekly summary sync Text template	 Organisation	06/01/25



3. Apply your template

Once the recording is complete, go to your template library, select the appropriate template, and choose which recording to populate it with.

4. Review and refine

Caption.Ed populates your template automatically. Review it and make any edits needed – think of it as a smart first draft that gets you 80-90% of the way there.

Sofia's performance review

Generated using  Sofia - Performance Review and  Performance review template
Created 02/05/25

Copy document

1. Goals review and impact

Over the past six months, Sofia has made strong, consistent progress toward her goals as a mid-level Market Specialist. She has deepened her market insights, strengthened cross-functional collaboration, and delivered high-impact analysis.

2. Learnings and growth

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Frequently Asked Questions

Can I use my existing company templates?

Yes, absolutely. Just upload your current templates as a PDF or text document – Caption.Ed works with what you already have rather than forcing you to adopt new formats.

What if the information isn't quite right?

You can review and edit everything. Auto-Fill Documents save you time by creating an accurate first draft, but you remain in control of the final output.

Does it work for all types of conversations?

It works best for structured conversations where you know what information you want to capture. If your conversations follow a similar pattern each time (like weekly check-ins, customer calls, or assessment meetings), templates will be particularly effective.

Do I need to create the template before every meeting?

No. Once you've created templates, you can reuse them. You might create one template for performance reviews, another for customer calls, and another for team meetings – then select the appropriate one each time.

How secure is my information?

Auto-Fill Documents use the same security standards as all Caption.Ed features. We're GDPR-compliant and ISO 27001 certified. Your templates and transcripts are processed securely and are never used to train AI models.

Can I share templates with my team?

Yes. If you create a template that works well, other team members can use it too, helping maintain consistency across your team.

What formats can I upload as templates?

Currently, we support PDF and text-based formats. Your template should have clear sections or headings that indicate what information belongs where.

Can I edit a template after I've created it?

Yes, you can refine your templates over time as you learn what works best for your conversations.

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Tips for getting the most from Auto-Fill Documents

Start simple

Begin with one type of meeting or conversation and one template. Once you're comfortable, expand to other use cases.

Use clear section headings

Templates with clear headings like "Key discussion points" or "Action items" work better than unstructured documents.

Iterate on your templates

It's easy to regenerate a document if you need to tweak your template.

Think about your workflow

Consider how the completed document fits into your wider process – do you need to export it to your CRM? Share it with colleagues? Store it in a particular system?

Focus on structure, not perfection

Templates are about creating a consistent structure quickly. They'll get you most of the way there, and you can always add the finishing touches manually.

Need help?

If you have questions about setting up Auto-Fill Documents or want advice on creating effective templates for your specific use case, [get in touch with our support team.](#)



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