



# Activate Unity Integration with Field Mapping

Help Guide

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## 1. About Unity Field Mapping

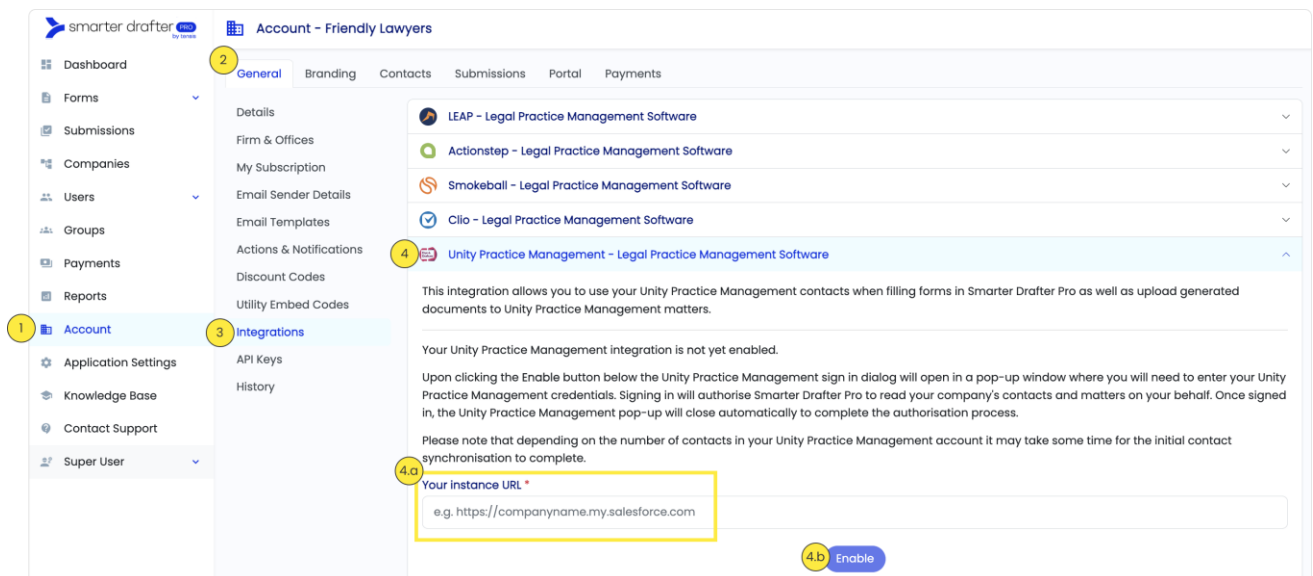
The Smarter Drafter Pro integration with Unity Practice Management allows you to:

1. Use Unity contact data when filling in Smarter Drafter Pro forms.
2. Send documents generated with Smarter Drafter Pro to matters in Unity.
3. Map Unity matter and contact fields to Smarter Drafter Pro forms fields so that data can be pulled into Smarter Drafter when filling in forms.

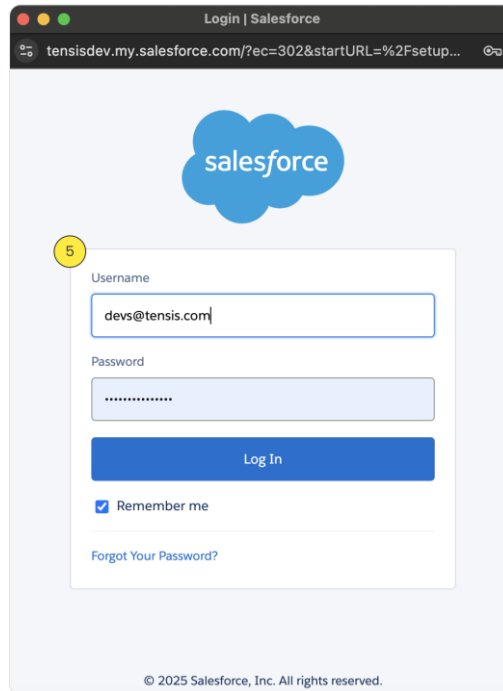
## 2. Enabling the Unity Integration

To enable the Unity Practice Management integration with Smarter Drafter Pro, head to the navigation menu on the left and click:

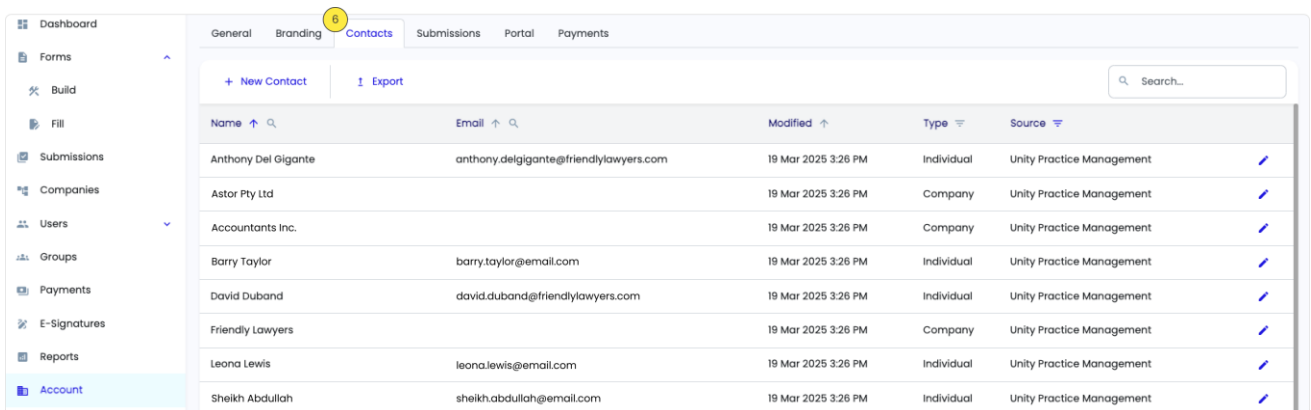
1. Account.
2. General.
3. Integrations.
4. Click **Unity Practice Management** to expand:
  - a. Enter your Unity instance URL.
  - b. Click **Enable**.



- A pop up will appear prompting you to enter your Unity username and password to authenticate and grant Smarter Drafter Pro access.



- Once the integration is connected successfully, you will see your Unity contacts in Smarter Drafter Pro under **Account > Contacts**.

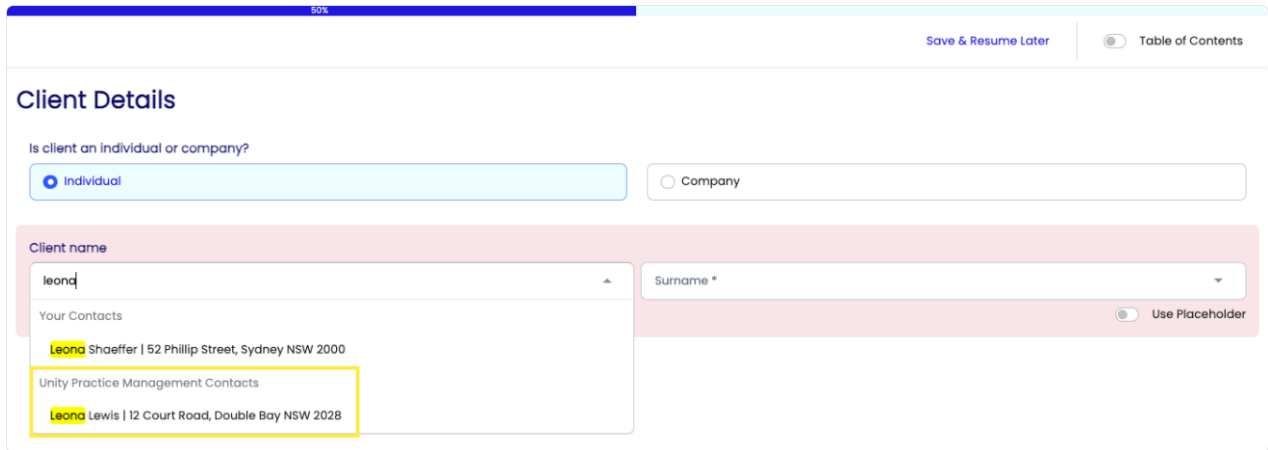


Name	Email	Modified	Type	Source
Anthony Del Gigante	anthony.delgigante@friendlylawyers.com	19 Mar 2025 3:26 PM	Individual	Unity Practice Management
Astor Pty Ltd		19 Mar 2025 3:26 PM	Company	Unity Practice Management
Accountants Inc.		19 Mar 2025 3:26 PM	Company	Unity Practice Management
Barry Taylor	barry.taylor@email.com	19 Mar 2025 3:26 PM	Individual	Unity Practice Management
David Duband	david.duband@friendlylawyers.com	19 Mar 2025 3:26 PM	Individual	Unity Practice Management
Friendly Lawyers		19 Mar 2025 3:26 PM	Company	Unity Practice Management
Leona Lewis	leona.lewis@email.com	19 Mar 2025 3:26 PM	Individual	Unity Practice Management
Sheikh Abdullah	sheikh.abdullah@email.com	19 Mar 2025 3:26 PM	Individual	Unity Practice Management

**Note:** Unity contact data cannot be edited from Smarter Drafter Pro. The integration only allows for Smarter Drafter to pull the data from Unity to use when filling in forms. Unity will remain the source of truth.

### 3. Accessing Unity Contacts to Fill in Forms

When the integration is enabled, Form Fillers will be able to use Unity contact data to fill out Smarter Draft forms. By typing the contacts name into the name field on a form, a dropdown will appear with all the available contacts. Upon selecting the contact, their details saved in Unity will be mapped to the corresponding fields in Smarter Drafter automatically.



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#### Client Details

Is client an individual or company?

Individual  Company

Client name

leona

Your Contacts

- Leona Shaeffer | 52 Phillip Street, Sydney NSW 2000
- Leona Lewis | 12 Court Road, Double Bay NSW 2028

Unity Practice Management Contacts

Surname \*

Use Placeholder



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Client name

Leona Lewis

Use Placeholder

Date of Birth

28 01 1988

Email address

leona.lewis@email.com

Use Placeholder

Phone number

0412563897

Use Placeholder

Billing address

Australia

Start typing here ...

12 Court Road

Address line 2

Double Bay New South Wales 2028

**Note:** The Smarter Drafter form fields must be “Contact mapped” by the Form Builder for this function to work. For more details, please see the [Contact and User Mapping Help Guide](#)

## 4. Mapping Unity Fields to Field Aliases

In addition to syncing contacts, the Unity integration with Smarter Drafter Pro allows fields from matter and contact objects in Unity to be mapped to Smarter Drafter field aliases.

### 4.1 Field Aliases

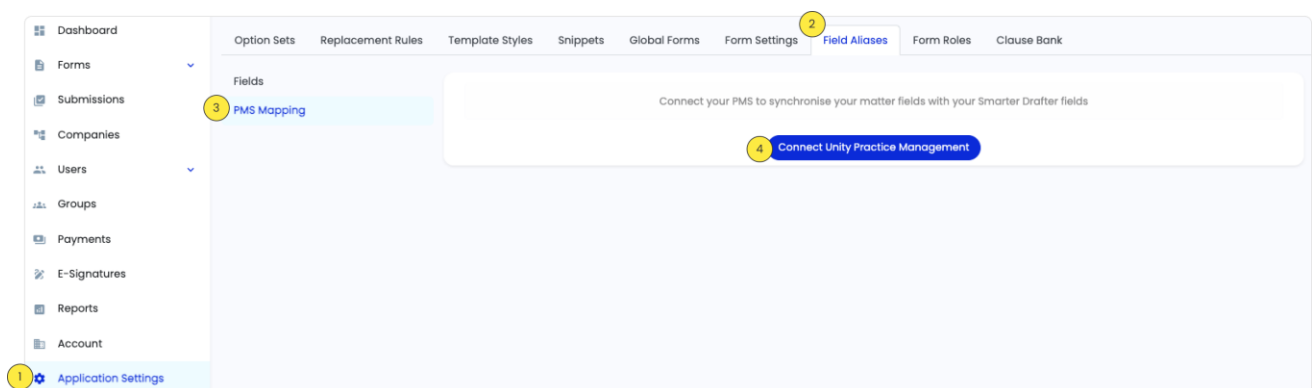
Field Aliases are generic identifiers that are used to create a connection between fields across forms. This allows data to be shared from one form to another when the same field alias is used on both (or many) forms.

**Helpful Tip:** Come up with a standardised naming convention when creating field aliases that can be used across various forms, which creates the necessary connection for sharing data from one form to another.

### 4.2 Importing Unity Fields

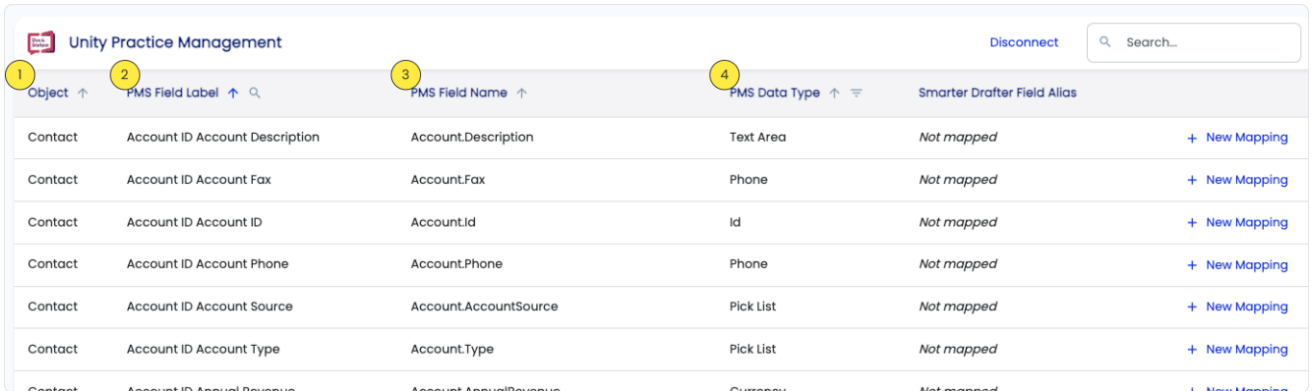
To import matter and contact object fields from Unity into Smarter Drafter Pro, navigate to:

1. Application Settings.
2. Field Aliases.
3. PMS Mapping.
4. Click Connect Unity Practice Management.



The fields will appear in a table with the following information:

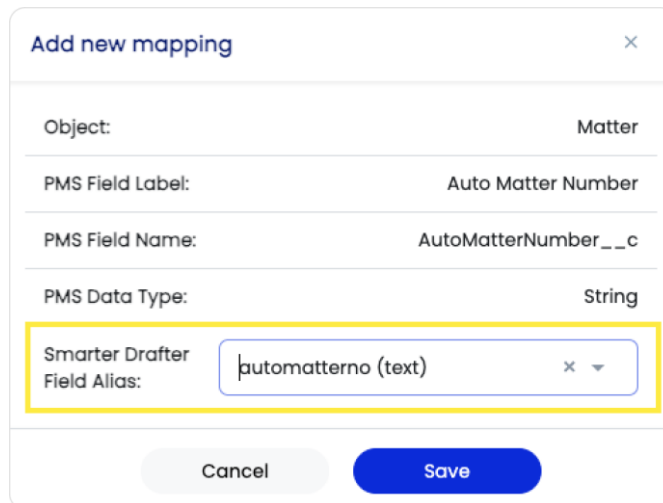
1. Object type.
2. Field label.
3. Field name.
4. Date type.



Object	PMS Field Label	PMS Field Name	PMS Data Type	Smarter Drafter Field Alias
Contact	Account ID Account Description	Account.Description	Text Area	Not mapped + New Mapping
Contact	Account ID Account Fax	Account.Fax	Phone	Not mapped + New Mapping
Contact	Account ID Account ID	Account.Id	Id	Not mapped + New Mapping
Contact	Account ID Account Phone	Account.Phone	Phone	Not mapped + New Mapping
Contact	Account ID Account Source	Account.AccountSource	Pick List	Not mapped + New Mapping
Contact	Account ID Account Type	Account.Type	Pick List	Not mapped + New Mapping
Contact	Account ID Annual Revenue	Account.AnnualRevenue	Currency	Not mapped + New Mapping

### 4.3 Mapping to Field Aliases

To map a Unity field to a Smarter Drafter Pro field alias, click **+ New Mapping**. A pop-up will appear allowing you to select an alias and click **Save**.



**Add new mapping** ✕

---

Object: Matter

---

PMS Field Label: Auto Matter Number

---

PMS Field Name: AutoMatterNumber\_\_c

---

PMS Data Type: String

---

Smarter Drafter Field Alias:

---

Cancel
Save

**Important note:** A field alias can only be mapped to *one* Unity field per object i.e. a field alias can be mapped to one *matter* object field and one *contact* object field.

### 4.3.1 Compatible Field Aliases and Data Types

Field Aliases must be mapped to field aliases with compatible data types.

Date Type	Compatible Field Aliases
String	text, textarea, name, phone, email, id
Boolean	checkbox, radio, select
Currency	number
Date / DateTime	datetime
Id	text, textarea, name, phone, email, id
Text Area	text, textarea, name, phone, email, id
Phone	text, textarea, name, phone, email, id
URL	unsupported
Email	text, textarea, name, phone, email, id
Pick List*	checkbox, radio, select
Multi Pick List*	checkbox, radio, select
Address	address

---

**Important note:** When mapping "Pick List" and "Multi Pick List" data types to a field alias, the corresponding form fields *must* have the same options with the exact label and order number. If not, the data will not be populated in the Smarter Drafter form.

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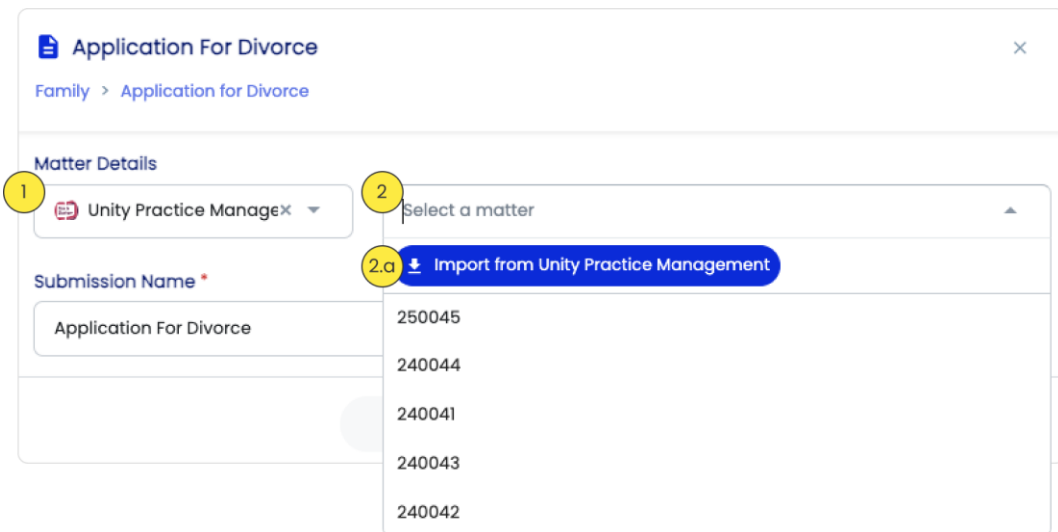
## 5. Auto-Filling Forms from Mapped Fields

Once the field aliases are mapped, Form Fillers can import data from Unity to auto-populate form fields in Smarter Drafter. To do so:

1. Click **Forms > Fill** from the navigation menu.
2. Locate the form.
3. Click **Start Form**.

A pop-up will appear to select the matter to import data from.

1. Ensure the **Matter source** is set to "Unity Practice Management",
2. Select the matter:
  - a. If the matter is not displaying in the dropdown list, click **Import from Unity Practice Management** to import new matters, and
3. Click **Start Form**



**Application For Divorce** ×

Family > Application for Divorce

**Matter Details**

1  2

2.a

**Submission Name \***

Application For Divorce

250045

240044

240041

240043

240042

Data from the selected matter will automatically populate the form fields with Unity-Field Alias mapping.

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### Matter Details

**Matter No:**  
  Use Placeholder

**Matter Summary**  
  Use Placeholder

**Matter Type**

**Matter Open Date**


**Client No:**  
  Use Placeholder

**Client Name:**  
   Use Placeholder

**Address**  
 ▼  
  
  
  
  ▼   Use Placeholder

## 6. Send Document to Unity

Upon completing the form, a pop-up will appear asking to send the generated document directly to the Unity matter selected at the start of the process (step 5 from Section 5). Click **Yes** and the document will be sent once it has been generated.



**Unity Practice Management**

Would you like to send this document to Unity Practice Management?  
 You will also be able to do this later from the list of submissions.

No

Yes