



Contact and User Mapping

Help Guide

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Table of Contents

1.	Contact Mapping	2
1.1	Apply Contact Mapping.....	2
1.2	Filling in a Form with Contacts Mapped	3
2.	Sections and Contacts.....	4
3.	User Mapping	5
3.1	Apply User Mapping	5

1. Contact Mapping

Fields that store contact information can be mapped to details stored in your address book or contacts database.

If contact data is mapped and the form filler begins typing a contact name, Smarter Drafter automatically looks up the contact and allows the user to select an existing entry. If an entry is selected, whatever data has been saved about that contact will be automatically entered in the form.

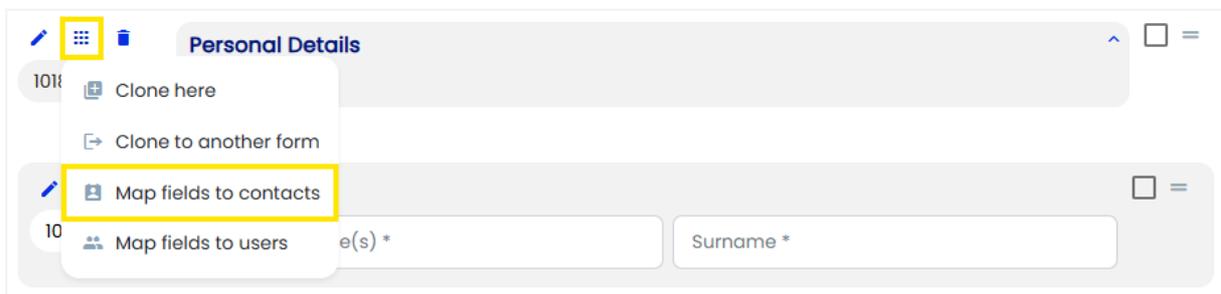
To achieve this result, we apply contact mapping to each section and specify the data to map to each field.

1.1 Apply Contact Mapping

To apply contact mapping:

Click the **waffle button** on the section with the contact fields.

Select **Map fields to contacts**.

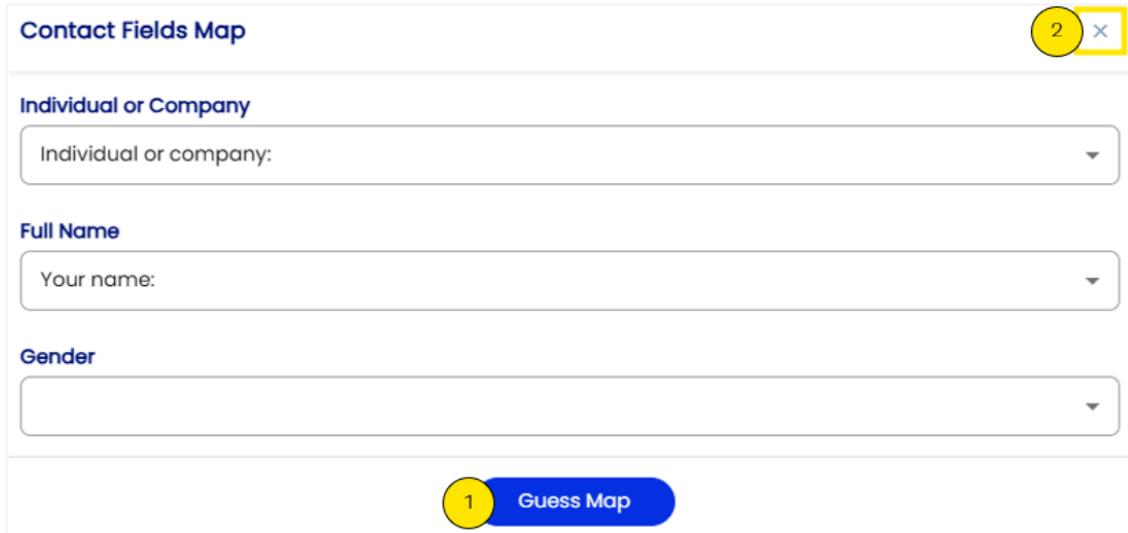


1. Click on the labels where you have a matching field, eg name, address, email etc and select the field to map to the label. Available fields will be displayed for you to select from.



For each label that you want to map, click and select the corresponding field.

1. When **Guess Map** is clicked, Smarter Drafter will search for fields to map and do it automatically.
2. When contact mapping is finished, **close the window**.



Contact Fields Map 2 ×

Individual or Company
Individual or company: ▾

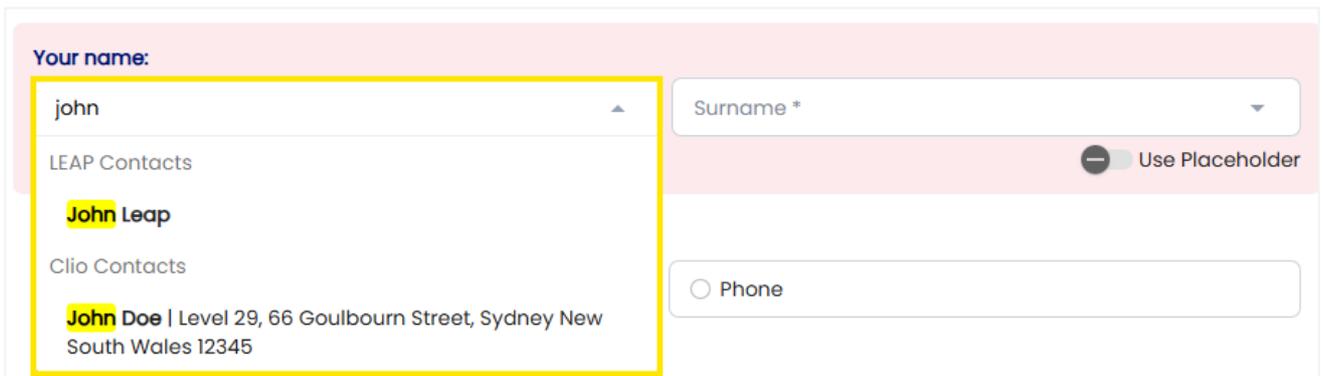
Full Name
Your name: ▾

Gender
▾

1 **Guess Map**

1.2 Filling in a Form with Contacts Mapped

In this example, you can see how contact mapping assists a form filler to complete forms quickly and accurately. The first name "John" has been typed, and with the power of contact mapping, all contacts with the first name John have been found.



Your name:

john ▴

LEAP Contacts

John Leap

Clio Contacts

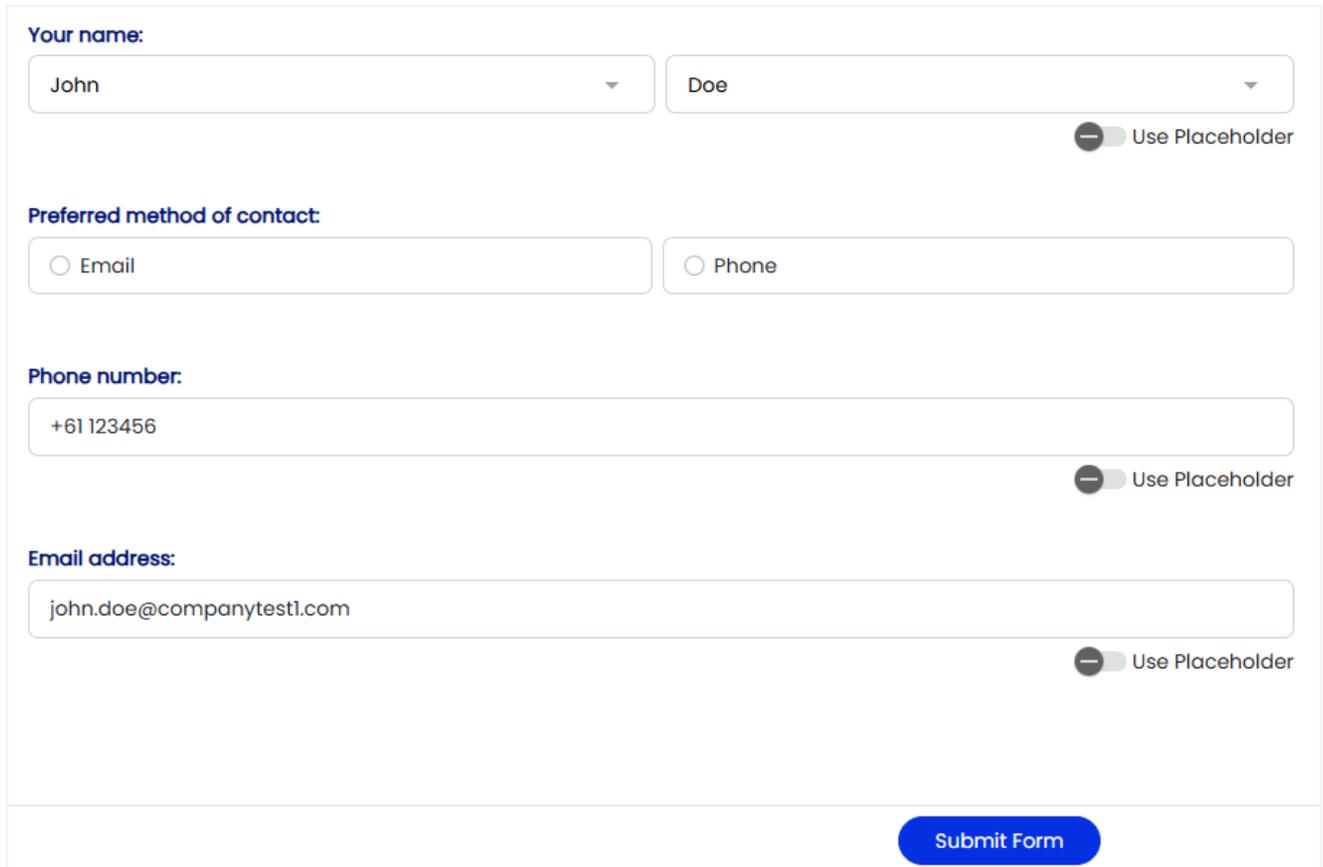
John Doe | Level 29, 66 Goulbourn Street, Sydney New South Wales 12345

Surname * ▾

Use Placeholder

Phone

By clicking the contact John Doe, many of the contact's details were automatically pulled into the form, including phone number and email address.

A screenshot of a web form with several sections. The first section is titled 'Your name:' and contains two dropdown menus. The first dropdown is set to 'John' and the second to 'Doe'. To the right of these is a toggle switch labeled 'Use Placeholder' which is turned off. The second section is titled 'Preferred method of contact:' and contains two radio button options: 'Email' and 'Phone'. The 'Email' option is selected. The third section is titled 'Phone number:' and contains a text input field with the value '+61 123456'. To the right is a 'Use Placeholder' toggle switch, which is turned off. The fourth section is titled 'Email address:' and contains a text input field with the value 'john.doe@companytest1.com'. To the right is a 'Use Placeholder' toggle switch, which is turned off. At the bottom right of the form is a blue button labeled 'Submit Form'.

Note: Only one contact can be mapped per section.

2. Sections and Contacts

Keep in mind that each section of a form can only be mapped to one contact. The example above shows one section mapped to one contact, but in a form with multiple sections, each section can be mapped to a different contact. If a form has a separate section for (for example) a plaintiff and a defendant, it would be possible to pull two sets of contact data from the address book or PMS.

3. User Mapping

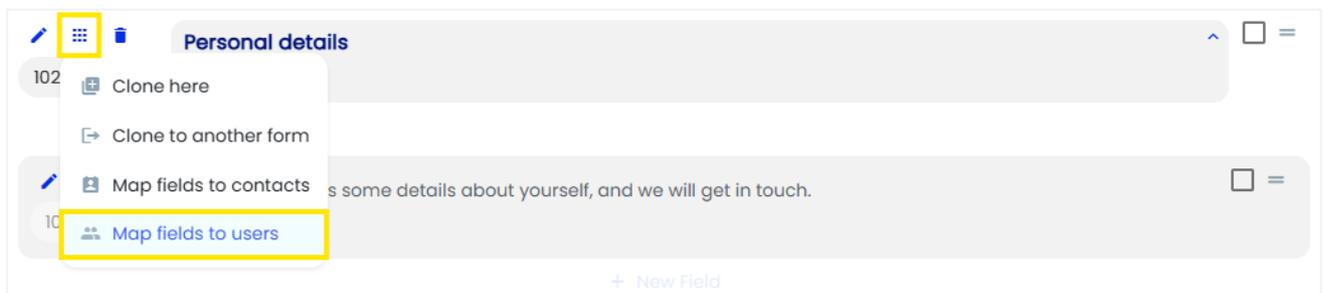
Fields can be mapped to pull in data from profiles of users who have Smarter Drafter Accounts. The process to set up user mapping is similar to the process for contact mapping, with a slight change.

3.1 Apply User Mapping

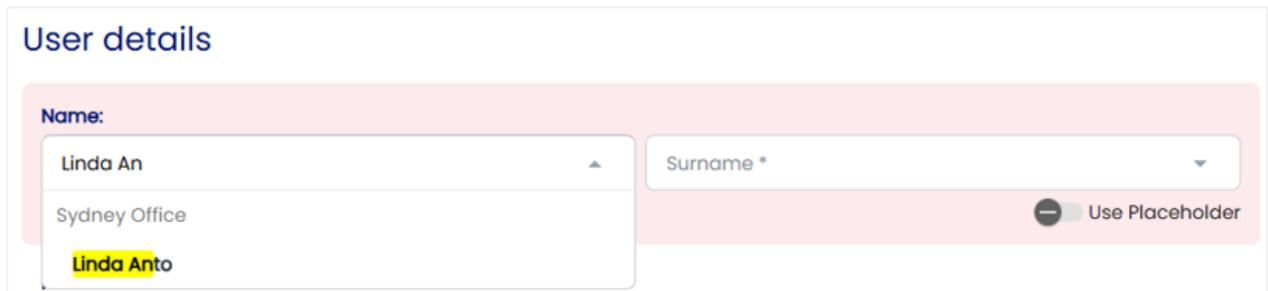
To apply user mapping:

Create a new **section** and build the fields as required.

Apply user mapping from the section **waffle button** and click **Map fields to user**.



When the form filler runs the document, they will be prompted to select a user and whatever data has been completed in the chosen user's profile will then be populated.



The screenshot shows a form titled 'User details'. It has a 'Name:' label. Below it is a dropdown menu with 'Linda An' selected. A list of suggestions is shown below the dropdown, including 'Sydney Office' and 'Linda Anto', with 'Linda Anto' highlighted in yellow. To the right of the dropdown is a 'Surname *' field. At the bottom right of the form, there is a 'Use Placeholder' toggle switch.