



Sync Form Fields with ActionStep Matter

Help Guide

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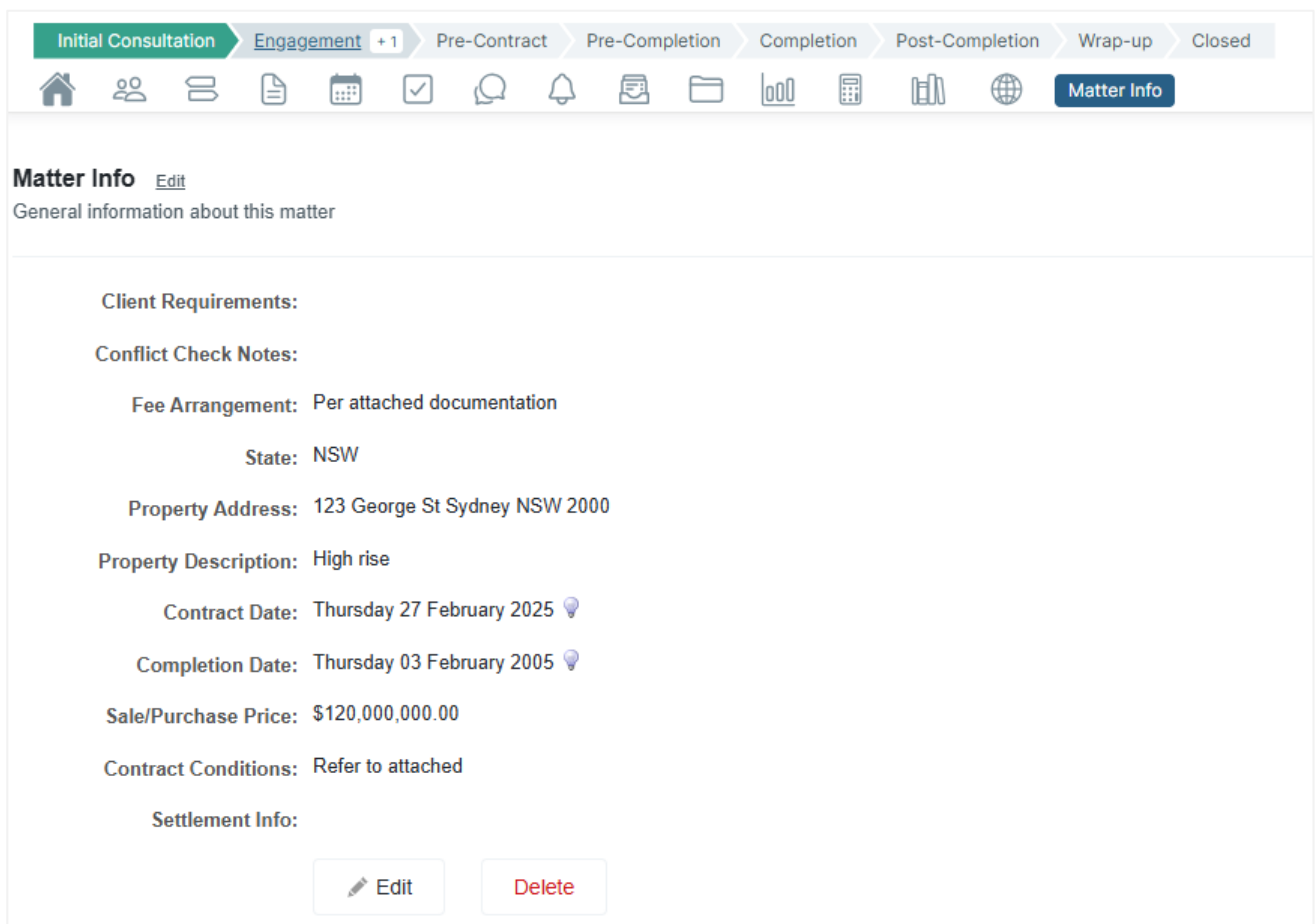
1. Sync Fields with ActionStep Matter

The integration between Smarter Drafter Pro and ActionStep allows contact and matter data to be shared across both systems, reducing the need to rekey data. Form builders can map fields from various matter types in ActionStep directly to their Smarter Drafter form fields. This connection allows Form Fillers to auto-populate Smarter Drafter forms by simply selecting the ActionStep matter.

This guide will show the steps to map data across these platforms.

1.1 Identify the Matter in ActionStep

Open ActionStep and find the required matter.

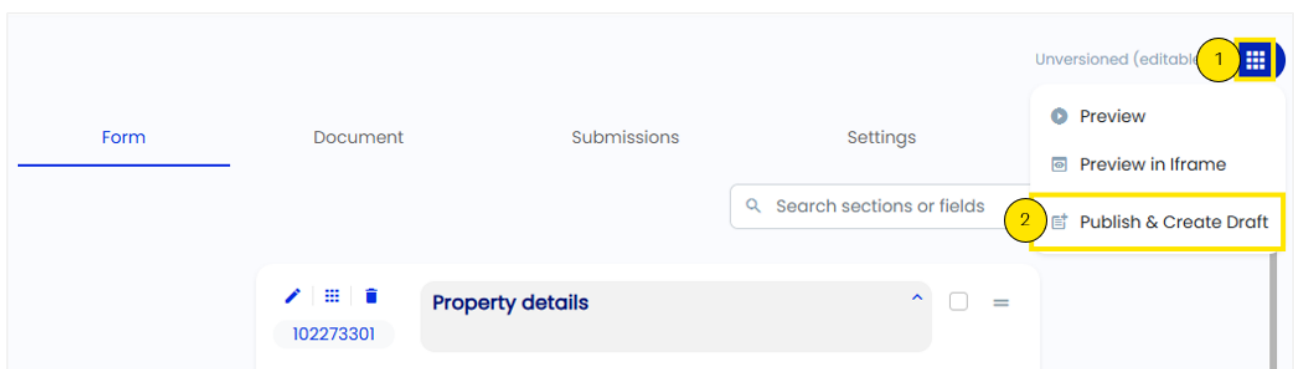
A screenshot of the 'Matter Info' page in the ActionStep application. The page has a top navigation bar with tabs: 'Initial Consultation' (active), 'Engagement +1', 'Pre-Contract', 'Pre-Completion', 'Completion', 'Post-Completion', 'Wrap-up', and 'Closed'. Below the tabs is a row of icons representing different document types. The main content area is titled 'Matter Info' with an 'Edit' link. Below the title is the text 'General information about this matter'. The form contains several sections: 'Client Requirements:', 'Conflict Check Notes:', 'Fee Arrangement: Per attached documentation', 'State: NSW', 'Property Address: 123 George St Sydney NSW 2000', 'Property Description: High rise', 'Contract Date: Thursday 27 February 2025' (with a lightbulb icon), 'Completion Date: Thursday 03 February 2005' (with a lightbulb icon), 'Sale/Purchase Price: \$120,000,000.00', 'Contract Conditions: Refer to attached', and 'Settlement Info:'. At the bottom right are two buttons: 'Edit' (with a pencil icon) and 'Delete' (in red text).

1.2 Create the Form in Smarter Drafter

Open a new form in the **form builder**. Build the form with the fields that are required.

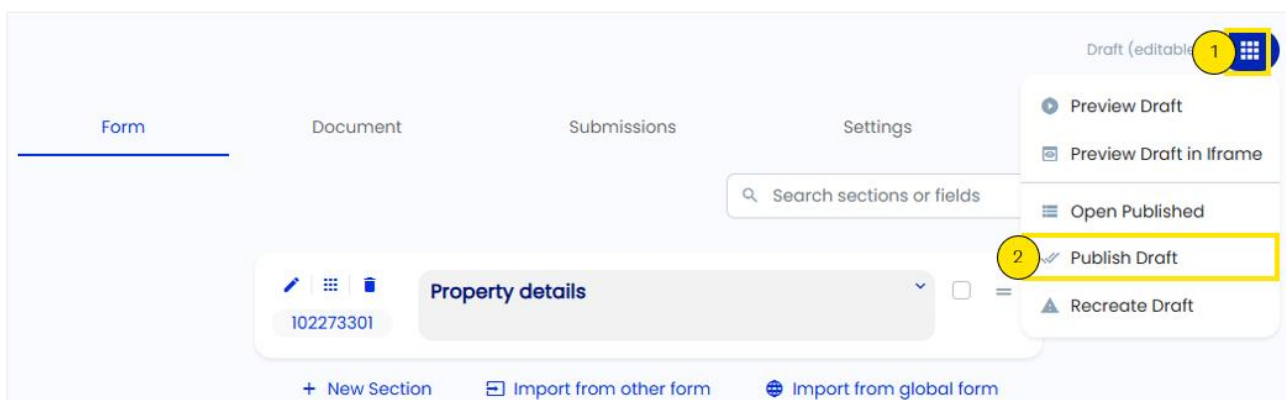
In the next step, the form fields will be populated with data from the ActionStep field data. To use this feature, the Smarter Drafter form must be in **Published** mode. The first step is to **create** a draft:

1. Click the **waffle button**.
2. Click **Publish and Create Draft**.



After you have taken the above step, **publish** the draft:

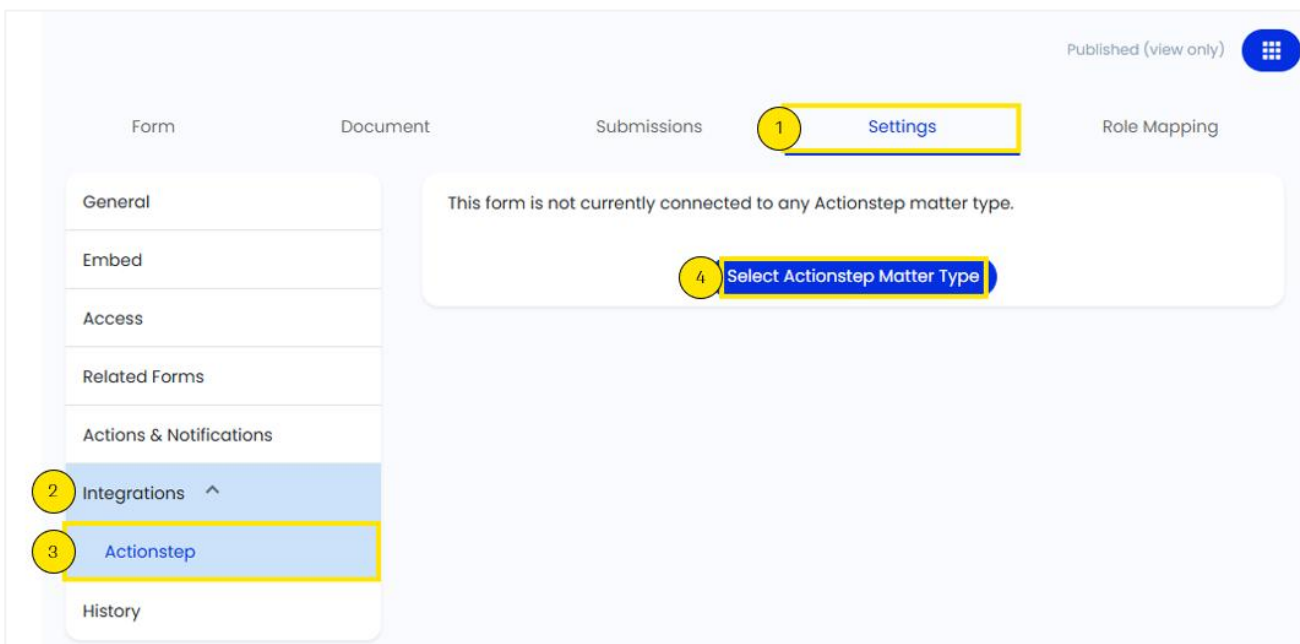
1. Click the **waffle button**.
2. Click **Publish Draft**.



1.3 Select Matter Type

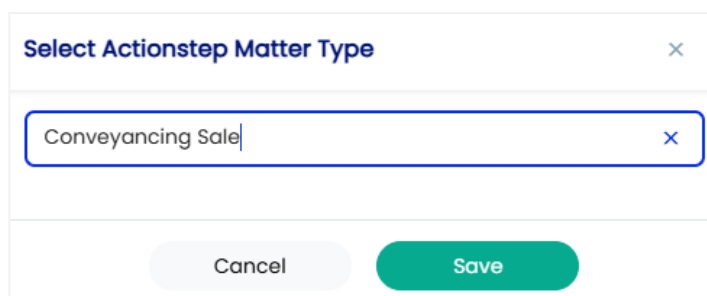
Now that the form is in **Published (view only)** mode, the ActionStep matter can be selected.

1. Click **Settings**.
2. Click **Integrations**.
3. Click **ActionStep**.
4. Click **Select ActionStep Matter Type**.



The screenshot shows the Smarter Drafter interface in 'Published (view only)' mode. The top navigation bar includes 'Form', 'Document', 'Submissions', 'Settings' (highlighted with a yellow box and a yellow circle with the number 1), and 'Role Mapping'. On the left, a sidebar menu lists 'General', 'Embed', 'Access', 'Related Forms', 'Actions & Notifications', 'Integrations' (highlighted with a yellow box and a yellow circle with the number 2), 'Actionstep' (highlighted with a yellow box and a yellow circle with the number 3), and 'History'. The main content area displays a message: 'This form is not currently connected to any Actionstep matter type.' Below this message is a button labeled 'Select Actionstep Matter Type' (highlighted with a yellow box and a yellow circle with the number 4).

Type the matter type into the field or select from the drop-down menu.



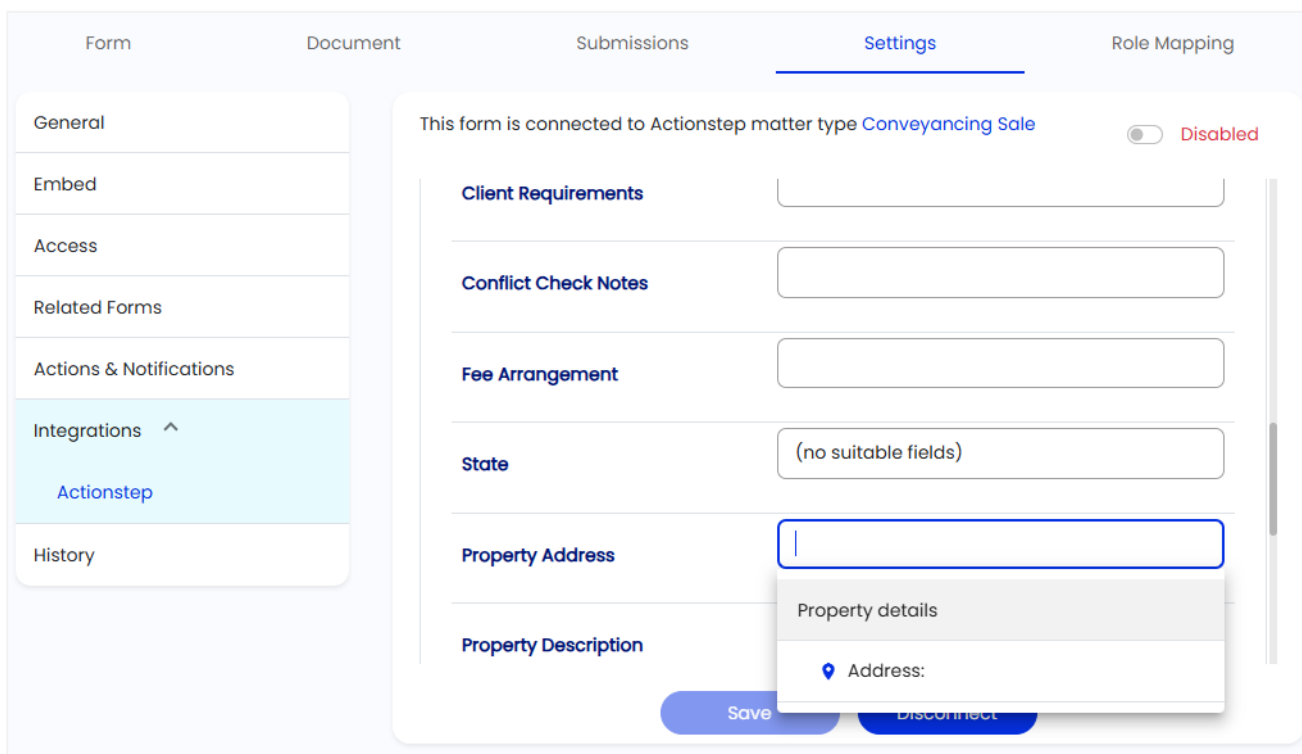
The screenshot shows a dialog box titled 'Select Actionstep Matter Type'. It features a text input field containing the text 'Conveyancing Sale'. Below the input field are two buttons: 'Cancel' and 'Save'.

1.4 Connect the Fields

Once you've selected the matter type, two sections will appear:

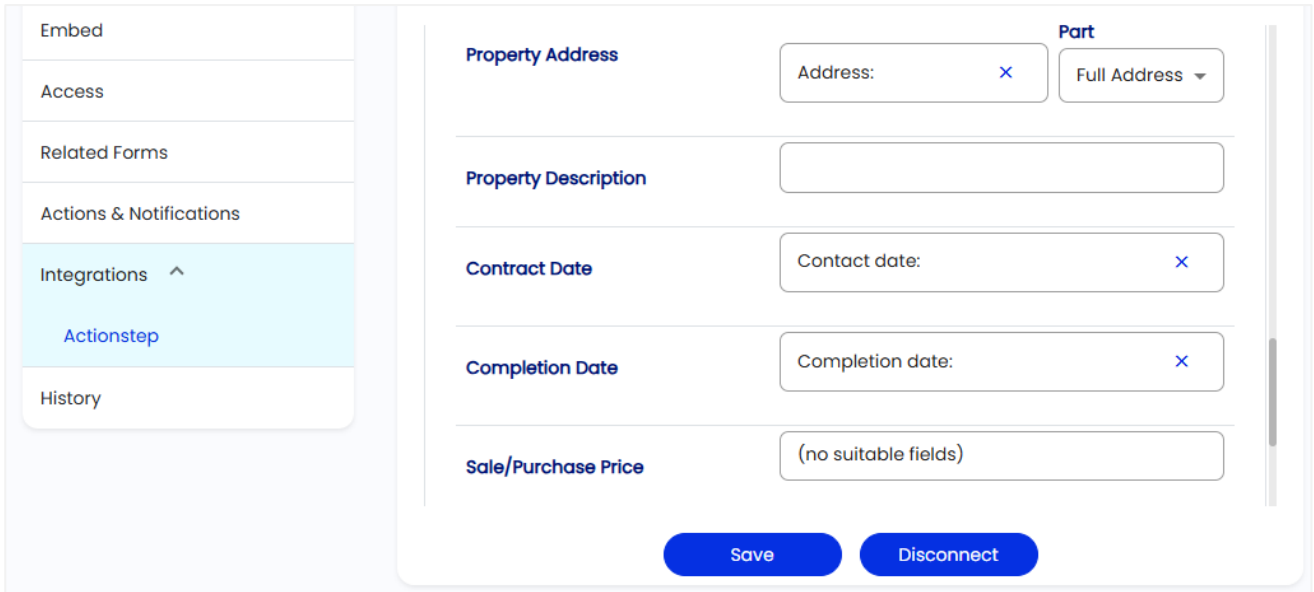
1. **Participant types:** this will display all the roles applicable to the selected matter type and their available fields to be mapped.
2. **Data collections:** this will display additional fields that are specific to the selected matter type.

Review the ActionStep fields (step 1.1). Select the Smarter Drafter field that aligns with each of the ActionStep fields, for example, **Property Address** aligns with the **Address** field in ActionStep.



The screenshot shows the 'Settings' tab in the Smarter Drafter interface. The left sidebar contains a menu with options: General, Embed, Access, Related Forms, Actions & Notifications, Integrations (expanded), Actionstep (selected), and History. The main content area is titled 'This form is connected to Actionstep matter type Conveyancing Sale' with a 'Disabled' toggle switch. Below this, there are several fields for mapping: Client Requirements, Conflict Check Notes, Fee Arrangement, State (showing '(no suitable fields)'), Property Address, and Property Description. A dropdown menu is open for the 'Property Address' field, showing 'Property details' and 'Address:'. At the bottom, there are 'Save' and 'Disconnect' buttons.

When the fields are connected as required, click **Save**.

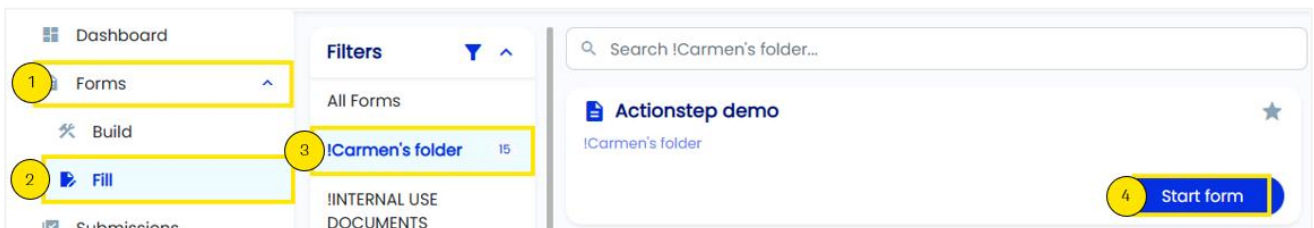


Note: ActionStep data cannot be imported to a form in preview mode. The form must be opened from the **Fill** screen.

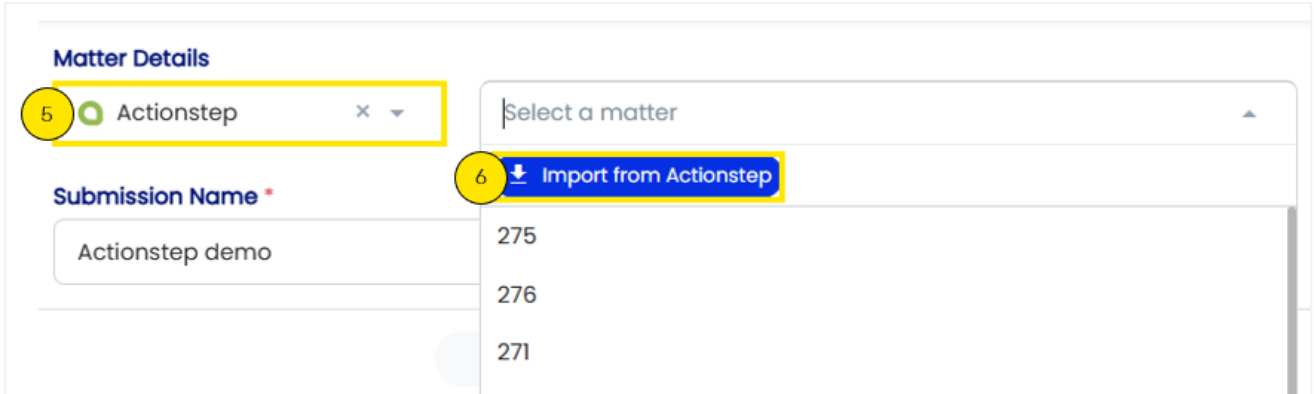
1.5 Fill Out the Form

Now that the fields are synced, it's time to fill in this form and import ActionStep data:

1. Click **Forms**.
2. Click **Fill**.
3. Click the **relevant folder**.
4. Find the form and click **Start form**.



5. The ActionStep data can now be imported. Select **ActionStep** in the **Matter Details**.
6. Click **Import from ActionStep**.



Matter Details

5 **Actionstep** x ▾

Submission Name *

Actionstep demo

6 **Import from ActionStep**

Select a matter ▴

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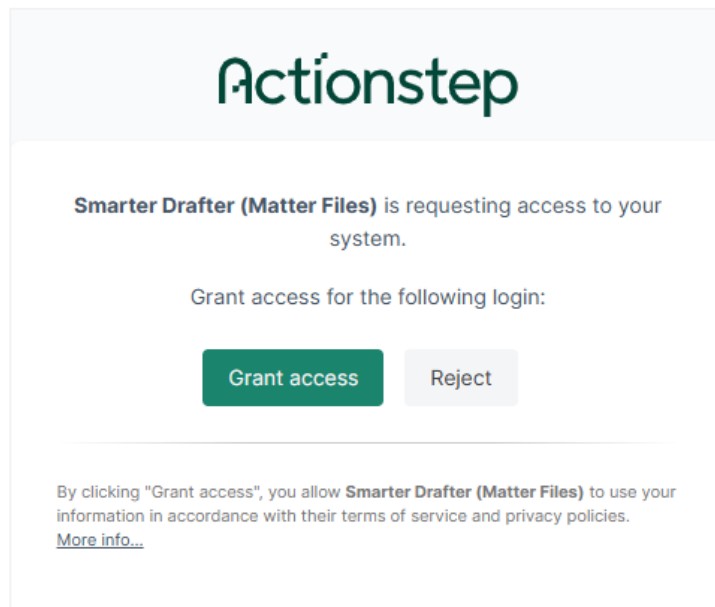
276

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1.6 Sign in to ActionStep

The ActionStep pop up may appear. Enter your credentials and log in.

When the Smarter Drafter request for access to the system appears (below), Click **Grant access**.



Actionstep

Smarter Drafter (Matter Files) is requesting access to your system.


Grant access for the following login:

Grant access **Reject**

By clicking "Grant access", you allow **Smarter Drafter (Matter Files)** to use your information in accordance with their terms of service and privacy policies.
[More info...](#)

1.7 Import the Matter

The ActionStep Matter can be selected from the list by clicking it (in this example, the matter with Id 278 will be used).

 **Actionstep Matters**
×

Matter


Search for a matter
▼

OR select from the list of recently updated matters

Id	Name	Last Updated
278	Conveyancing Sale	28 Feb 2025 10:58 AM
277	Sydney	24 Feb 2025 4:18 PM
276	AS01 - Financial Agreement	22 Jan 2025 12:58 PM


Cancel
Save

The ActionStep matter is imported to Smarter Drafter. Click **Start Form Now**.

 **Actionstep demo**
×


!Carmen's folder

Matter Details

 Actionstep
×

278
×

Clients (optional)

 Antonio Vescio - Individual
×

+ Add client

Submission Name *

Actionstep demo

Cancel
Start Form Now

1.8 Complete the Form

The form will open, with the relevant ActionStep data imported into the form fields.

[Save & Resume Later](#) ☐ [Table of Contents](#)

Address:

Australia

Start typing here ...

123 George Street

Address line 2

Sydney

New South Wales

2000

☐ Use Placeholder

Contact date:

27

2

2025

Completion date:

3

2

2005

Sale/purchase price:

AUD - Australian Dollar

\$120,000|00

Contract conditions:

Refer to attached

[Submit Form](#)

Note: Some fields may not be compatible with imported data. Review the form to ensure that all the fields are filled, and if necessary, fill them manually.
