

# Apply User Mapping

Module 14 - Contact and User Mapping

Version 1.0

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## 1. User Mapping

### 1.1 What is User Mapping?

User Mapping is a feature that allows fields to connect to user profiles in the Smarter Drafter account and automatically populate data that is already known about a user.

User profiles have fields for the following data:

<b>First name(s) *</b>	<b>Surname *</b>
<input type="text" value="Linda Antoinette"/>	<input type="text" value="Di Girolamo"/>
<b>Initials *</b>	
<input type="text" value="LAD"/>	
<b>Correspondence name *</b>	<input checked="" type="checkbox"/> Same as first name(s) and surname
<input type="text" value="Linda Antoinette Di Girolamo"/>	
<b>Position *</b>	
<input type="text" value="Head of Learning &amp; Enablement"/>	
<b>Practising certificate number</b>	
<input type="text" value="PRAC12345"/>	
<b>Office</b>	
<input type="text" value="Sydney Office"/> x ▼	
<b>Direct phone *</b>	<b>Direct email *</b>
<input type="text" value="0410 541 500"/>	<input type="text" value="linda.digirolamo@smarterdrafter.com.au"/>
<b>Service email</b>	
<input type="text" value="service@gmail.com"/>	
<b>Signature</b> <a href="#">Remove</a>	
	

## 1.2 When to Apply User Mapping?

Apply User Mapping where fields are asking for details about a user that could already be held in the user's profile.

User Mapping should be used where details of a user are required and can be automatically populated to save re-keying the same information.

## 2. Applying User Mapping

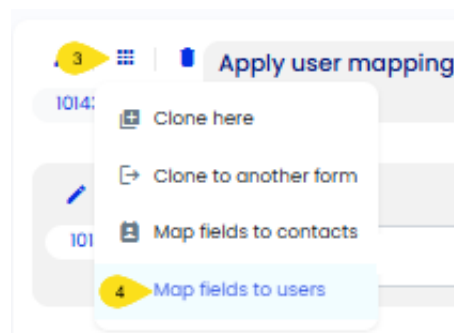
There are two ways to apply User Mapping:

- By creating fields in the form and manually applying mapping to the corresponding profile field  
>> use this method if you only need to ask for a few details
- Automatically add all possible profile fields  
>> use this method if you need to ask for many/all profile details  
>> you can easily and quickly delete what you don't need

### 2.1 Create Fields and Apply Manual User Mapping

To manually apply User Mapping:

1. Create a new section. Add the section name and alias, and set properties as required.
2. Create fields for the required user details, e.g. name, position and email. Add aliases and set properties as required.
3. On the section banner, click on the **waffle menu**.
4. Select **Map fields to users**.



5. The list of possible user details from the profile will appear, allowing you to connect to fields you have created and map the user details to your specific fields.

**User Fields Map** ✕

Full Name

Given Name(s)

Surname

Initials

Correspondence Name

Practising Certificate Number

Position/Title

Direct Phone

Direct Email

Service Email

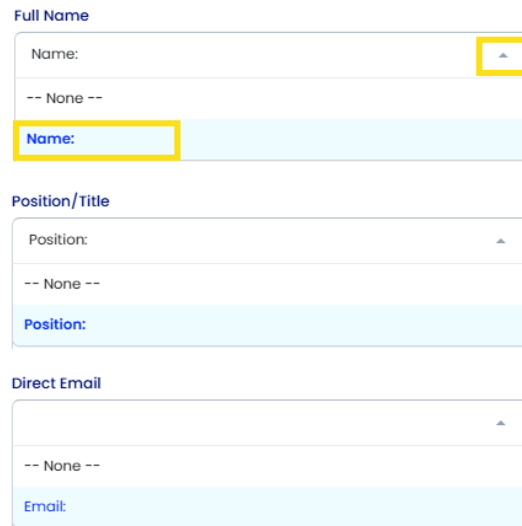
Office

Add Mapped Fields

Guess Map

6. Smarter Drafter can interpret the types of fields you have created and automatically assign the User Mapping for you. Click **Guess Map** to have the mapping applied and then check the fields to ensure the correct fields were matched.

- Otherwise, to manually apply User Mapping, click on the drop-down of the user details to be mapped and select the field that you have created to connect them. If a matching field wasn't created, no options will be available to map those details.



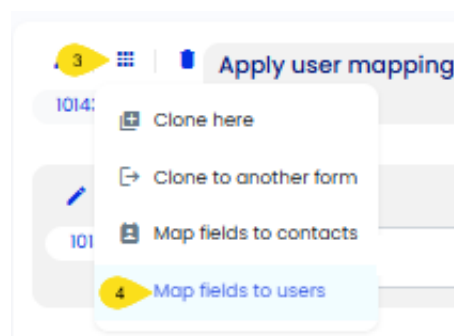
- Click the **X** in the top right corner to close the User Mapping window.



## 2.2 Automatically Create Fields for all Profile Details with User Mapping Applied

To automatically create fields for all profile details with User Mapping applied:

- Create a new section. Add the section name and alias, and set properties as required.
- Create fields for the required user details, e.g. name, address, email and mobile number. Add aliases and set properties as required.
- On the section banner, click on the **waffle menu**.
- Select **Map fields to users**.



5. Click Add Mapped Fields.

**User Fields Map** ×

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**Full Name**

**Initials**

**Practising Certificate Number**

**Position/Title**

---

Add Mapped Fields

Guess Map

6. Apply a reference/label to use for the description of the fields and click OK.

**User Reference** ×

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**How do you want to refer to this user in the form?**

Matter lawyer

✓

---

Cancel

Ok

7. In the section, a field will be created for each user detail and mapping will automatically match the field to the correct user detail, e.g.:

**User Fields Map** ✕

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**Full Name**

Matter lawyer - name: ▼

**Initials**

Matter lawyer - initials: ▼

**Correspondence Name**

Matter lawyer - correspondence name: ▼

**Practising Certificate Number**

Matter lawyer - practising certificate number: ▼

**Position/Title**

Matter lawyer - position/title: ▼

**Direct Phone**

Matter lawyer - direct phone: ▼

**Direct Email**

Matter lawyer - direct email: ▼

8. In the form, make any required adjustments to the fields, e.g.:

- Enter aliases
- Drag to reorder
- Multi-select to delete
- Set name case
- Set address format
- Set date format
- Adjust required/optional/read only settings
- etc

Once all adjustments have been made and the section has been finalised, continue building the form.

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**NOTE:** User Mapping can only be used once per section. If multiple look-ups are required in a form, you will need to create separate sections for each.

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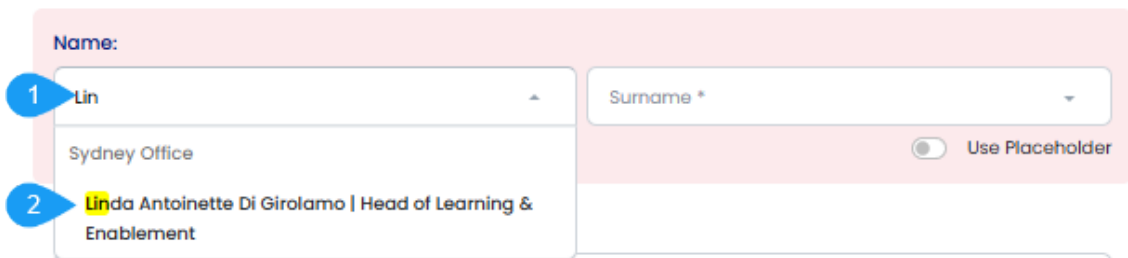


### 3. How Does User Mapping Work?

When User Mapping has been applied to a section, the profile look-up feature will automatically trigger when the form filler answers the person's name question:

1. As the form filler begins typing a name, Smarter Drafter automatically runs a dynamic search to check for matching entries.
2. The form filler can then select an existing entry.

#### Apply user mapping



**Name:**

1 Lin

Sydney Office

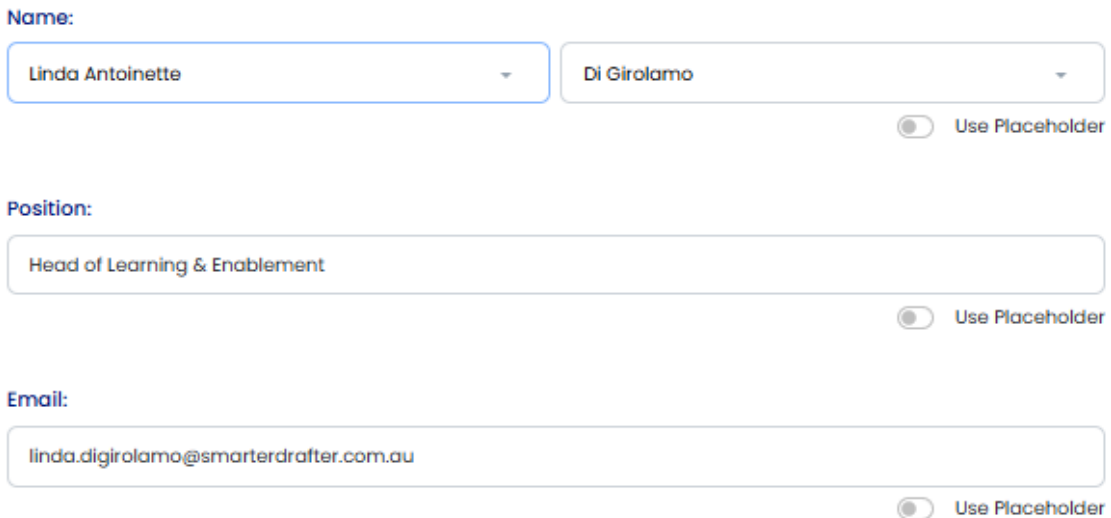
2 Linda Antoinette Di Girolamo | Head of Learning & Enablement

Surname \*

☐ Use Placeholder

3. Any data known about that user will populate into the corresponding fields in the form.

#### Apply user mapping



**Name:**

Linda Antoinette

Di Girolamo

☐ Use Placeholder

**Position:**

Head of Learning & Enablement

☐ Use Placeholder

**Email:**

linda.digirolamo@smarterdrafter.com.au

☐ Use Placeholder

4. If any data is missing, the relevant user profile will need to be updated and then the submission refreshed/regenerated to bring in the new details.