smarter drafter PRO
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Guide to Using the Matter Record in Your Firm

Version 1.0

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About this document

This guide is designed for existing Smarter Drafter Pro users with the Builder ability who want a deeper understanding of how Matter Record works, how it fits into multi-document workflows, and how it changes the way data flows across forms.

It explains how Matter Record captures, stores, and reuses information across a matter, and how this improves accuracy, consistency, and speed across your firm's processes.

If your team currently re-enters the same details across multiple documents, or if you want to understand how Smarter Drafter handles parties, properties, entities, and roles, this guide will walk you through the concepts, capabilities, and practical applications.

You can use the following sections to:

- Understand the purpose and value of the Matter Record
- See where it fits into real workflows across your firm
- Learn how roles, aliases, and record types work
- Prepare your own precedents and forms to take full advantage of Matter Record
- Support change management for your users

Understanding the Matter Record

Matter Record is the data backbone that allows Smarter Drafter to reuse information across all documents within the same matter. Instead of retyping client names, company details, property information, or key attributes in each form, users capture these details once — and Smarter Drafter carries them through every linked document.

This is important because most professional workflows don't involve a single document. They involve document packs, sequences, and bundles where the same information appears again and again. That's where Matter Record makes a difference: it removes the repetitive data entry and ensures the same details stay consistent across the entire workflow.

Matter Record does three things:

1. Captures structured information once: Users enter details for people, companies, properties, assets, or any other entities only once at the start of the workflow.
2. Stores that information centrally: This data sits in a dedicated matter-level record — not in separate documents — meaning it can be accessed by any other form tied to that matter.
3. Applies it automatically across documents: When another form asks for the same type of information (such as a full name, role, address, or date), Smarter Drafter automatically fills it in using the Matter Record.

This ensures:

- consistent details across all documents
- less retyping and fewer errors
- cleaner data for PMS-integrated firms
- smoother, faster production of multi-document workflows
- better support for complex, multi-party matters

Whether you're preparing legal document packs, accounting engagement bundles, or policy-related documents in insurance, Matter Record becomes the single source of truth that ties the entire workflow together.

1. What the Matter Record Does

The Matter Record is a shared data repository that stores information collected from one or more Smarter Drafter forms for the within and across matter.

Once saved, this data can be reused:

- by other forms within the same matter
- by other forms for a different matter*
- by integrations via APIs

In short: if *Form A* collects client name and *Form B* later needs client name, the Matter Record fills it automatically - no retyping.

> ***Note:** Only data using the *Role Record Type* can be shared across matters. Data using the *Matter Details Record Type* is matter-specific and can not be shared across matters. See below for more information.

2. What Your Form Must Include

For a form to be Matter Record–compatible, it needs two things to be applied correctly:

a. Field Aliases	**What they are**: A field alias is the universal label for the type of data being collected. **What they do**: They tell the system what the data is, regardless of what the field question says (e.g., "client's full name", "applicant's full name", "child's full name" all map to the alias name_full). **Why they are important**: Matching field aliases across forms is how Smarter Drafter knows that "This question on Form B asks for the same type of information we already have from Form A."
b. Record Types	**What they are:** Record Types describe who or what the data belongs to and can be categorised using one of two types: 1. **Roles**, which is used for people, companies or entities whose data may appear in other matters e.g., Client, Debtor, Purchaser, Applicant 2. **Matter Details**, which is used for data that is unique to a single matter e.g., contract information, key dates specific to a transaction or court information

	Why they are important: Record Types tell Smarter Drafter "This name_full belongs to this person/entity in this matter."

3. How Field Aliases and Record Types Work Together

Think of it like this, the Field Alias describes the type of data (e.g. "name_full"), whereas the Record Type describes whose data it is (e.g. "client"). Together they create a structure:

Record Type	→ Field Alias	→ Answer
(Client)	→ (name_full)	→ ("Sarah Johnson")

If another form asks for the same alias for the same record, the answer will be reused.

4. Step-by-Step: Setting Up Your Form Correctly

Step 1: Add your questions

Write your questions in plain language for the user (e.g., "What is the client's full name?").

Step 2: Apply the correct Field Alias

For each question, choose the alias that represents the type of data being collected e.g.,

- `name_full`
- `dob`
- `address_residential`
- `marital_status`

> **Tip**: Aliases should not include the role name.
>
> - Good: `name_full`
> - Bad: `client_name_full`

Step 3: Assign the correct Record Type

For each field:

- Select a Role or Matter Information type
- Ensure you are grouping all relevant fields under the same record

Example:

Field/Question	Field Alias	Record Type
What is the client's full name?	name_full	Role: client
What is the client's date of birth?	dob	Role: client
What is the client's residential address?	address_residential	Role: client
Please specify the client's marital status	marital_statue	Role: client

5. Common Mistakes (and How to Avoid Them)

❌ Using different aliases for the same data

Bad example:	Correct:
• `client_name_full` • `applicant_name=`	• `name_full` for both

❌ Forgetting to set a role

If a field doesn't have a Record Type, the Matter Record cannot store or reuse it.

❌ Trying to encode meaning into the alias

Aliases should NOT include:

- role names
- question wording
- matter context

They should purely describe the data type.

6. Sharing Data from the Matter Record Between Forms

Once your form fields use consistent Field Aliases and the correct Record Types, Smarter Drafter can automatically reuse saved data across any forms assigned to the same matter.

There are **two ways** data can be shared between forms:

1. When the Record Type and Field Aliases match

2. When the Field Aliases match, but the Record Types differ, but both roles refer to the same entity in that matter

Scenario 1: When Field Aliases and Record Types Match

If two forms use the same Record Type (e.g., "client") and the same Field Aliases (e.g., `name_full`, `dob`, `address_residential`), Smarter Drafter immediately knows:

"This question is about the same type of information for the same entity. Use the data already saved in the Matter Record."

Example: Form A → Form B

Form A is completed first, capturing information about the client:

Matter X: Form A			
Field/Question	Field Alias	Record Type	Response
What is the client's full name?	name_full	Role: client	Sarah Johnson
What is the client's date of birth?	dob	Role: client	16-11-1990
What is the client's residential address?	address_residential	Role: client	100 Street Road, Sydney NSW 2000
Please specify the client's marital status	marital_statue	Role: client	Defacto

These responses are saved in the Matter Record as the "Client" entity for this matter.

When **Form B** is opened for the same matter, Smarter Drafter sees:

- The same Record Type (client)

- The same Field Aliases

So all matching fields are **automatically pre-filled** with the saved "Client" data:

Matter X: Form B			
Field/Question	Field Alias	Record Type	Response
What is the client's full name?	`name_full`	Role: client	Sarah Johnson
What is the client's date of birth?	`dob`	Role: client	16-11-1990
What is the client's residential address?	`address_resedential`	Role: client	100 Street Road, Sydney NSW 2000
Please specify the client's marital status	`marital_status`	Role: client	Defacto

No user action is required as the answers flow automatically.

Scenario 2: When Field Aliases Match but Record Types Differ (Same Entity)

Sometimes forms refer to the same person using different roles. For example:

- Form A uses Role: client
- Form C uses Role: applicant

If, in this matter, the client and applicant are the same person, you can tell Smarter Drafter that these two roles represent the same underlying entity.

Once linked:

- Smarter Drafter treats both record types as referring to the same person
- Any matching Field Aliases (e.g., `name_full`, `dob`, `address_residential`) will automatically populate across forms

Example: Form A (client) → Form C (applicant)

Form A captures:

Field Alias	Record Type	Response
`name_full`	Role: client	Sarah Johnson
`dob`	Role: client	16-11-1990

Form C asks:

Field Alias	Record Type
name_full	Role: client
dob	Role: client

If you confirm that client = applicant for this matter:

- name_full and dob automatically pre-fill on Form C
- Even though the roles differ, the shared Field Aliases ensure the right data is reused

This scenario is particularly useful for:

- Multiple intake forms with different role labels
- Forms where the same person plays different roles (e.g., client → applicant → purchaser)
- Scenarios where firms standardise form wording for different practice areas

In Summary

In summary, data will always be reused between forms when they collect the same type of information using the same Field Aliases. If both forms also use the same Record Type, for example, "client", the data is automatically pre-filled without any extra configuration. If the forms use different Record Types, for example, "client" on one form and "applicant" on another, but those roles refer to the same person for that matter, you can link them as the same entity.

Once linked, any matching Field Aliases will populate automatically. In both cases, the key requirement is consistent Field Aliases; the only difference is whether the Record Types already match or need to be mapped to the same person.