smarter drafter PRO

by tensis

Apply Contact Mapping

Module 14 - Contact and User Mapping

Version 1.0

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1. Contact Mapping

1.1 What is Contact Mapping?

Contact Mapping is a feature that allows fields to connect to listings in the address book and automatically populate data that is already known about a contact.

Individual contact cards have fields for the following data:

Title
Title

Given Name(s) *
Barney John

Surname *
Rubble

Gender
⦿ Male   ○ Female   ○ Non-binary

Date of birth
29 November 2002   ✕   📅

Is this contact acting as the trustee of a trust? *
○ Yes   ⦿ No

Email
barneyjohnrubble@gmail.com

Phone
0400 999 888

Fax
+61 2 9988 7766

Does this contact have an address? *
⦿ Yes   ○ No

Country *
Australia

Search Address
Start typing here...

100 Blamey Street

Address line 2

Kelvin Grove   Queensland   4059

Company contact cards have fields for the following data:

Is it an Australian company? *

- ● Yes
- ○ No

Company ACN

100 200 300

Company Name *

Rubble Enterprises Pty Ltd

Is this contact acting as the trustee of a trust? *

- ○ Yes
- ● No

Email

dino@rubbleenterprises.com.au

Phone

0400111 222

Fax

02 9988 7766

Does this contact have an address? *

- ● Yes
- ○ No

Country *

Australia

Search Address

Start typing here...

1 Brick Makers Drive

Via Epping

Wollert

Victoria

3750

1.2 When to Apply Contact Mapping

Apply Contact Mapping where fields are asking for contact details that could already be held in the address book OR if new contact data is entered, to allow that data to be saved to the address book.

Contact Mapping should be used where details for an individual, company/organisation or trust are required and can be stored to save re-keying the same information in the future.

2. Applying Contact Mapping

There are two ways to apply Contact Mapping:

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

2.1 Create Fields and Apply Manual Contact Mapping

To manually apply Contact Mapping:

1. Create a new section. Add the section name and alias, and set properties as required.
2. Create fields for the required contact details, e.g. name, address, email and mobile number. Add aliases and set properties as required.
3. On the section banner, click on the **waffle menu**.
4. Select **Map fields to contacts**.
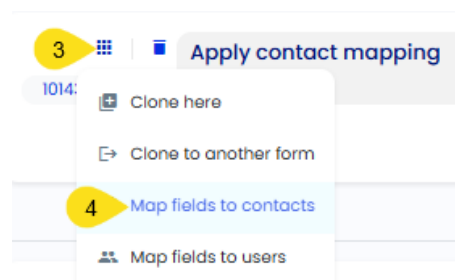
5. The list of possible contact details from the address book will appear, allowing you to connect to fields you have created and map the contact details to your specific fields.

Contact Fields Map   ×

Individual or Company

[▾]

Title

[▾]

Full Name

[▾]

Given Name(s)

[▾]

Surname

[▾]

Gender

[▾]

Date of Birth

[▾]

Is Australian Company

[▾]

Company Name

[▾]

(**Add Mapped Fields**)   (**Guess Map**)

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

7. Otherwise, to manually apply Contact Mapping, click on the drop-down of the contact 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.

Full Name

-- None --

Name:

Address

-- None --

Street address:

Email

-- None --

Email:

Phone

-- None --

Mobile number:

8. Click the **X** in the top right corner to close the Contact Mapping window.
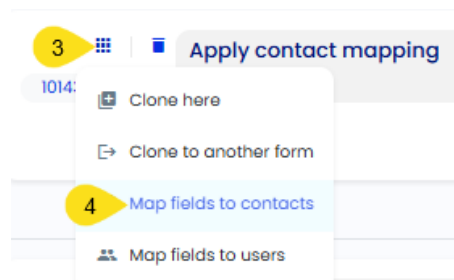
Contact Fields Map   ×

2.2 Automatically Create Fields for all Contact Details with Contact Mapping Applied

To automatically create fields for all contact details with Contact Mapping applied:

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

5. Click **Add Mapped Fields**.

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

Contact Reference   ✕

How do you want to refer to this contact in the form?

| Broker | ✓ |

Cancel   Ok

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

Contact Fields Map   ✕

Individual or Company

Is Broker an individual or a company?   ▼

Full Name

Broker – name: ▼

Gender

Broker – gender: ▼

Date of Birth

Broker – date of birth: ▼

Is Australian Company

Is Broker an Australian company?   ▼

Company Name

Broker – company name: ▼

Company ACN

Broker – ACN: ▼

Company Number

Broker – company number: ▼

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

9. Logic is automatically applied to individual, company and trust fields.

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

NOTE: Contact Mapping can only be used once per section. If multiple look-ups are required, you will need to create separate sections for each.
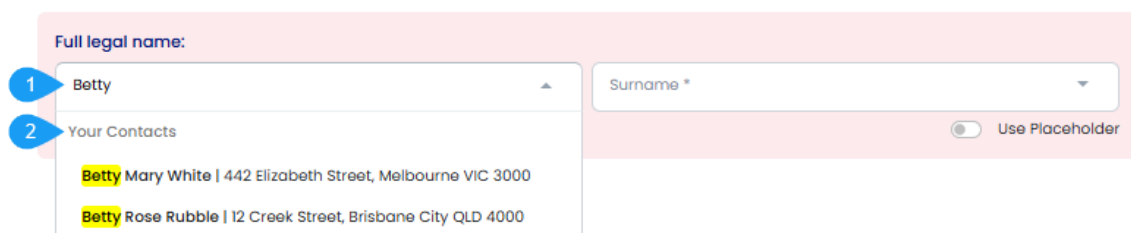
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3.   How Does Contact Mapping Work?

When Contact Mapping has been applied to a section, the contact look-up feature will automatically trigger when the form filler answers the contact person or company'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 or continue typing the name of the new contact.

Personal details

Please give us some details about yourself and we will get in touch.

Full legal name:

1 Betty

Surname *

2 Your Contacts

Use Placeholder

Betty Mary White | 442 Elizabeth Street, Melbourne VIC 3000

Betty Rose Rubble | 12 Creek Street, Brisbane City QLD 4000

3. If an entry is selected, any data known about that contact will populate into the corresponding fields in the form.

Personal details

Please give us some details about yourself and we will get in touch.

Full legal name:

| Betty Rose ▾ | Rubble ▾ |

○ Use Placeholder

Date of birth:

| 1 | 3 | 2005 |

Email:

[   ]

○ Use Placeholder

Mobile phone no.

[   ]

○ Use Placeholder

4. The form filler can then add any missing data and/or amend any outdated data, and continue through the questionnaire.

Personal details

Please give us some details about yourself and we will get in touch.

Full legal name:

| Betty Rose ▾ | Rubble ▾ |

○ Use Placeholder

Date of birth:

| 1 | 3 | 2005 |

Email:

bettyroserubble@gmail.com

○ Use Placeholder

Mobile phone no.

0410 987 654

○ Use Placeholder

5. If a matching entry is not available, the form filler will need to manually enter the contact's details.
6. When the form is submitted, the form filler will have the option to **save** any new contacts, additional contact details they added or changes that were made, or opt to **skip this step** and ignore the additions and changes.

Save Contacts

Please select contacts that you would like to save:

☐ Select all

👤 Betty Rose Rubble
12 Creek Street, Brisbane City QLD 4000

○ Save as individual   ● Update existing

Skip this step   Save