smarter drafter PRO

by tensis

Manage Field Aliases

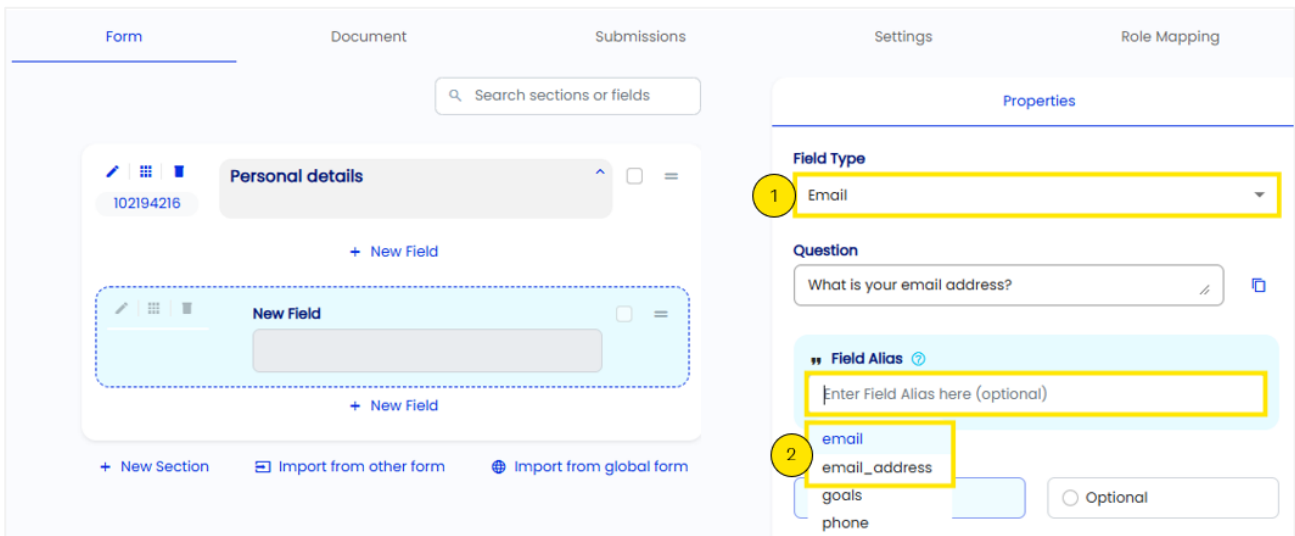## Help Guide

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1.   Field Aliases

Field aliases are created as a form is built. The label typed into the Field Alias box will be recorded as the field alias. If the field aliases in use in your organisation have gotten disorganised – that is, there is more than one field alias applied to a field type – an admin may need to clean up the list of field aliases.

1.1   Identifying Duplicate Field Aliases

In this example, a new form is being built.

1.   The type of field being added is an Email.

2.   There is more than one field alias in use that is associated with emails. This is not ideal – the contact mapping feature will work optimally with one field alias associated with emails.
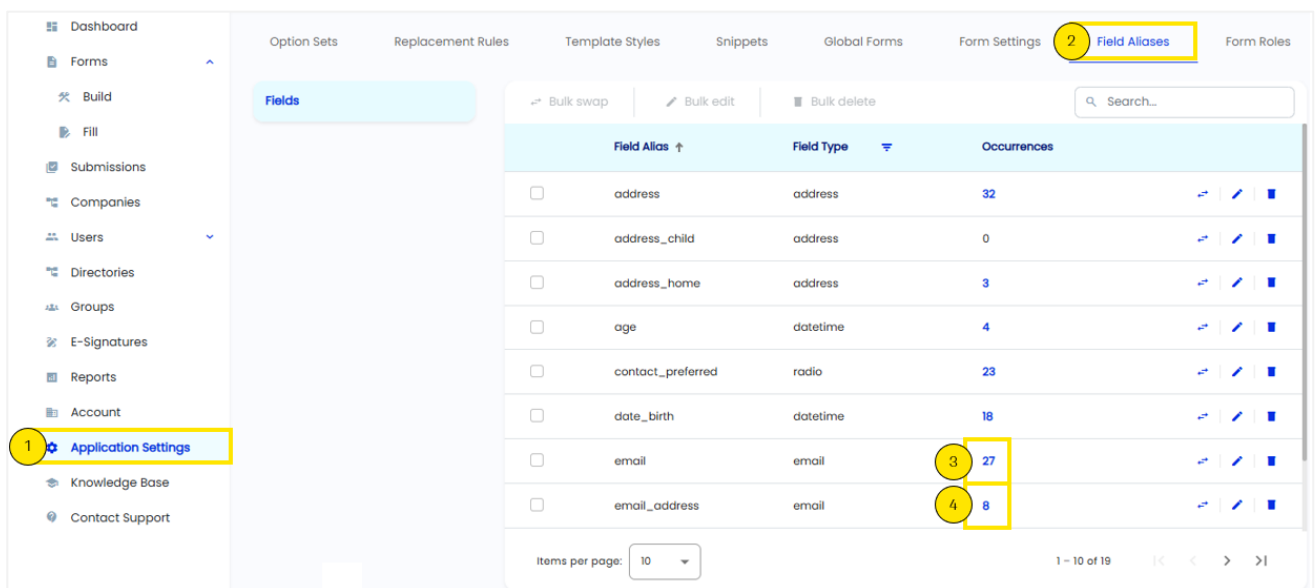
1.2 Organising Field Aliases

To properly organise the field aliases associated with the Email field, review the **Field Aliases** list. To open the list:

1. Click **Application Settings** in the navigation menu.

2. Click the **Field Aliases** tab. In this screen, the field aliases in use are listed.

3. In the **Occurrences** column, review the two aliases associated with email addresses.

4. One of the duplicate aliases is associated with fewer forms – email_address, which has only eight occurances. This alias will be removed from the list, and the fields it's applied to will be associated with the other email alias. Click on the occurrence number for email_address to review the forms in which it is used.

1.3 Consolidate Field Aliases

When you click on the **Occurrences** number, the occurrences for that field appear in a pop up. To consolidate the email fields under one alias, the forms in this list need to be opened and the field alias needs to be changed to reflect the correct alias – in this example, the correct alias is **"email"**. Make a note of these forms and make the necessary changes.

View Occurrences ×

email_address is used in the following forms:

Form	Occurrences
Morgan - New Training Agreement	1
AS02-Agreement	1
AS01-Agreement	1
AS01-Agreement	1
2 - New Training Agreement	1
2 - New Training Agreement	1
1 - Training Agreement	1
1 - Training Agreement	1

Close

1.4 Delete the Duplicate Alias

Click **Close** on the View **Occurrences** pop up above. **Delete** the duplicate alias by clicking the trash button. Click **Delete alias** in the pop up to permanently delete the alias.

	Field Alias ↑	Field Type ⇌	Occurrences			
☐	address	address	32	⇌	✎	■
☐	address_child	address	0	⇌	✎	■
☐	address_home	address	3	⇌	✎	■
☐	age	datetime	4	⇌	✎	■
☐	contact_preferred	radio	23	⇌	✎	■
☐	date_birth	datetime	18	⇌	✎	■
☐	email	email	27	⇌	✎	■
☐	email_address	email	8	⇌	✎	■

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Delete alias   ✕

You are about to delete the field alias **email_address**. This will be removed from all form fields using this alias. This action is permanent and can not be undone. Would you like to proceed?

Cancel   Delete alias