How to Map Data

This article shows you how to map data. You must complete this task if you want to dynamically create web pages from a data set. The mapping process is the same for both Repeater and Details template structures.

By the end of this article, you will be able to:

- locate the mapping icon on a toolbar
- connect components on a template page with fields in a data set
- map images to an Image component
- create inline text mapping
- preview your work

Before you start

Before data mapping begins, you must first a) build a data set and b) create a template page.

There are two ways to build a data set: create one online or import an Excel file. For more information, see:

1. How to Create a Data Set Online
2. How to Import an Excel File into a Data Set

There are two ways to create a template page. Each option produces a different output.

1. Learn how to create a Repeater template page here.
2. Learn how to create a Details template page here.

Limitations

Some types of components cannot be mapped to a data set. These include sliders and forms.

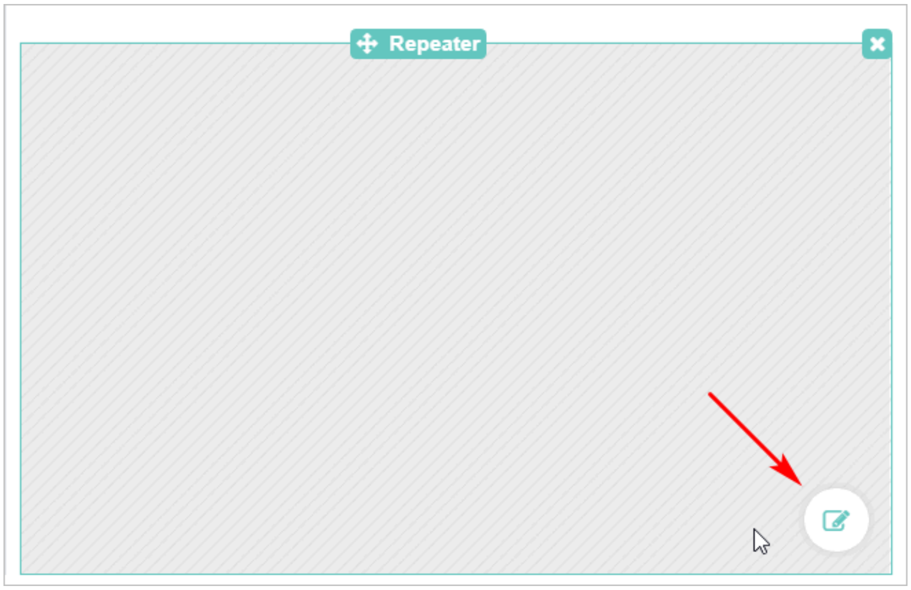
More information

Are you interested in using advanced template techniques to create an engaging user experience?

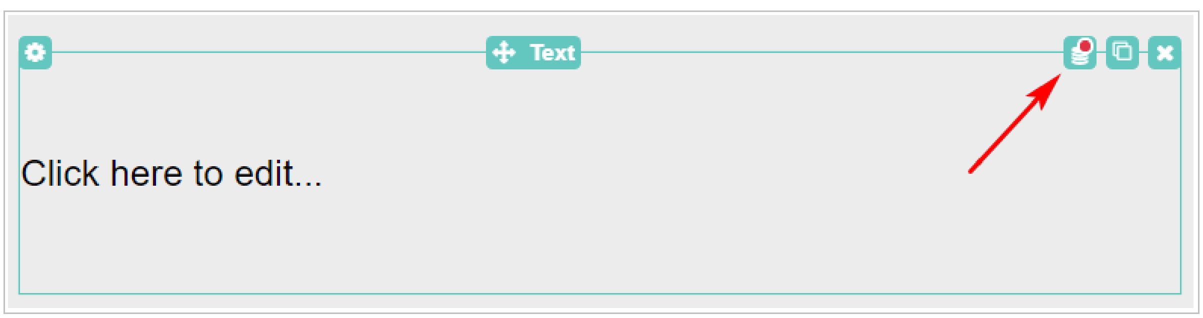
- Learn how to create a multi-level template structure here.

1 Locating the mapping toolbar icon

1. Open a template page (Repeater or Details).
2. If you are mapping components inside the Repeater component, hover the mouse pointer on the Repeater and then click the Edit button. The Repeater component opens.



3. Hover the mouse pointer on a component. The component toolbar displays.
4. In the top-right corner of the toolbar, click the Mapping icon. It looks like a set of CDs with a red dot. The Map to a Column panel displays.



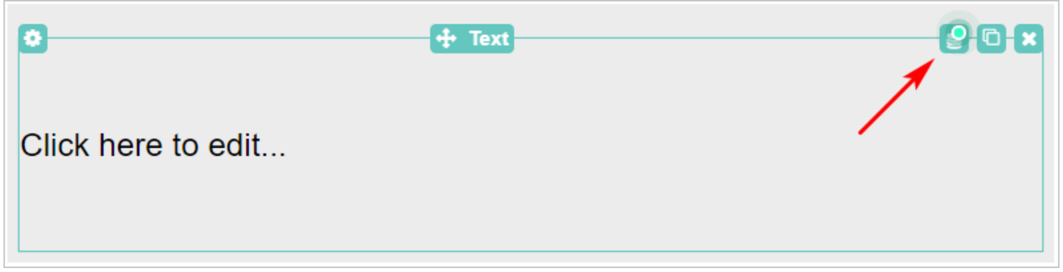
2 Mapping data

The Map to a Column panel lists fields in the data set connected to this template page.

1. With the Map to a Column panel open, click the name of the data field you want to link to this component.

map-3.png

2. Click OK. The panel closes.
3. Hover the mouse pointer on the same component. A green glowing button appears on the mapping icon.



4. Repeat mapping steps for each component.
5. When complete, click Save.

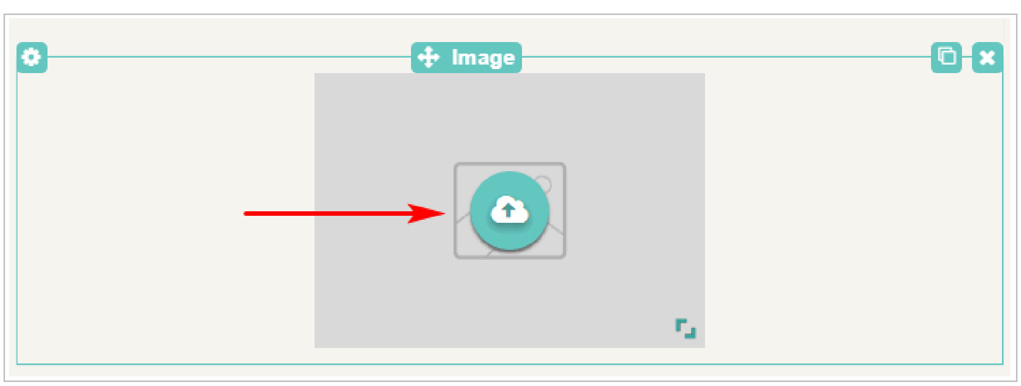
3 Mapping images

You can map images, but there are some differences. One difference is the toolbar. As shown below, the toolbar on an Image component does not have a mapping icon (which looks like a stack of CDs).

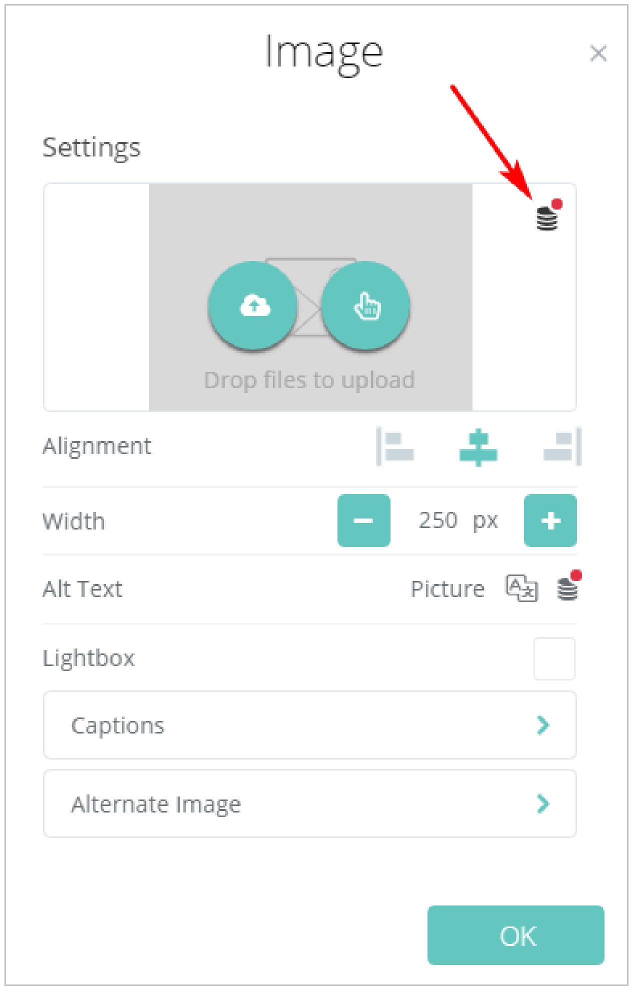
Another difference is the way to map. A different approach is required because image mapping transmits a lot of data, including the image file, Alt Text (always recommended for SEO), links, and captions.

Here is the image mapping process:

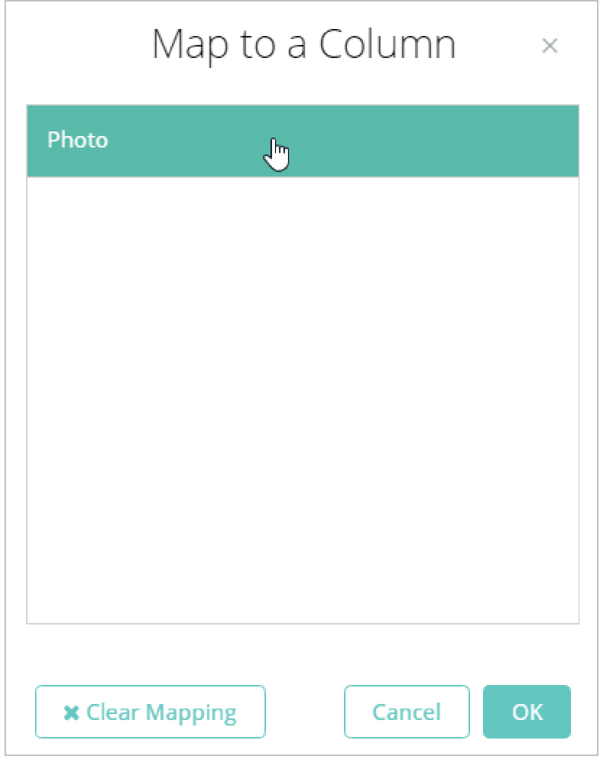
1. Click the cloud icon inside the Image component. The Image Settings panel displays.



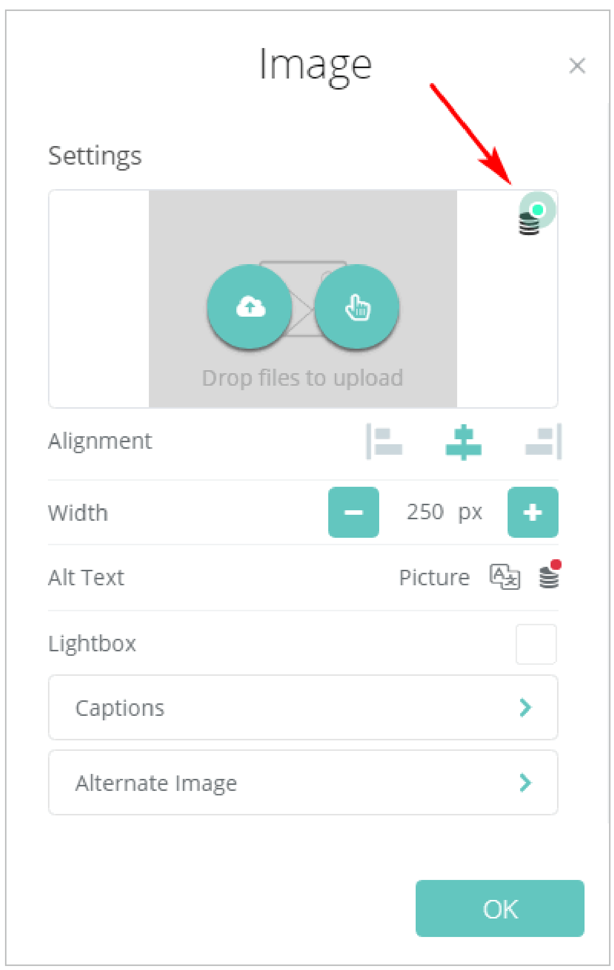
2. On the Image Settings panel, click the mapping icon at the top of the panel (not the icon in the middle of the panel). The Map to a Column panel displays.



3. On the Map to a Column panel, select the image field. In the picture below, the images in our data set are in a column called Photo.



4. Click OK. The Image Settings displays again. Now the top mapping icon is green.
5. Click OK on the next panel.
6. Click Save.

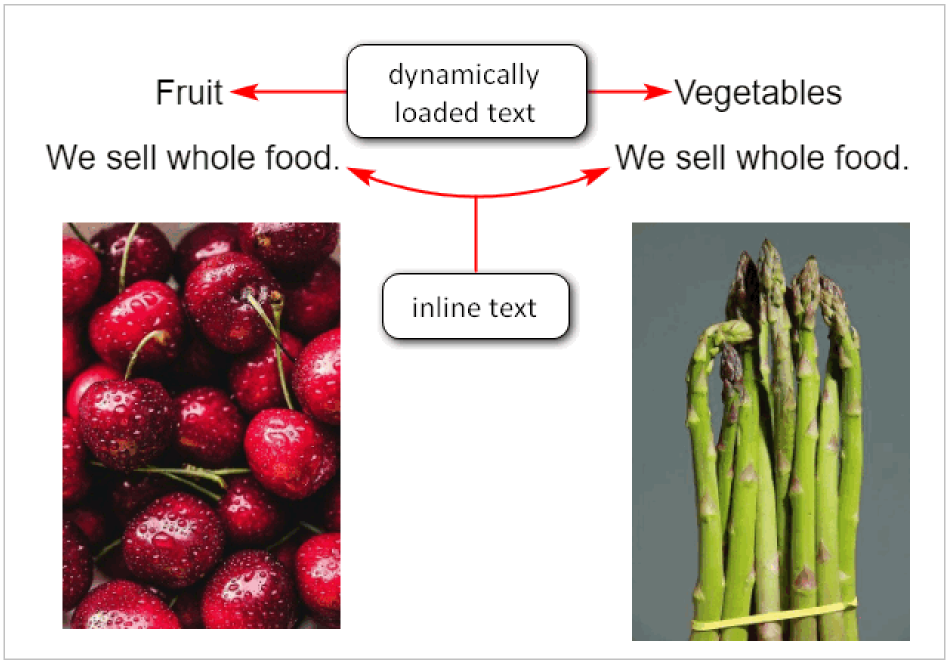


4 Creating inline text mapping

Inline text mapping is a text formatting tool that combines dynamically loaded data with fixed text. It's a useful tool if you want to create a block of text which is partly unique and partly standardized. Inline text mapping can be used with Repeater and Details templates.

- Inline text mapping is a different kind of mapping. With inline text mapping, you map the words inside a component -- not the component itself -- to a data set.

The image below provides an example of inline text mapping with a Repeater template. The image shows two items from a data set displayed horizontally on a screen: fruit and vegetables.



To create this text format in a template, we inserted one Text component above an Image component. There are two parts inside the Text component:

- Text mapped to a column in the data set (i.e. a column with the names fruit and vegetables).
- Inline text to display a standard message that is repeated for each item (i.e. We sell whole food.).

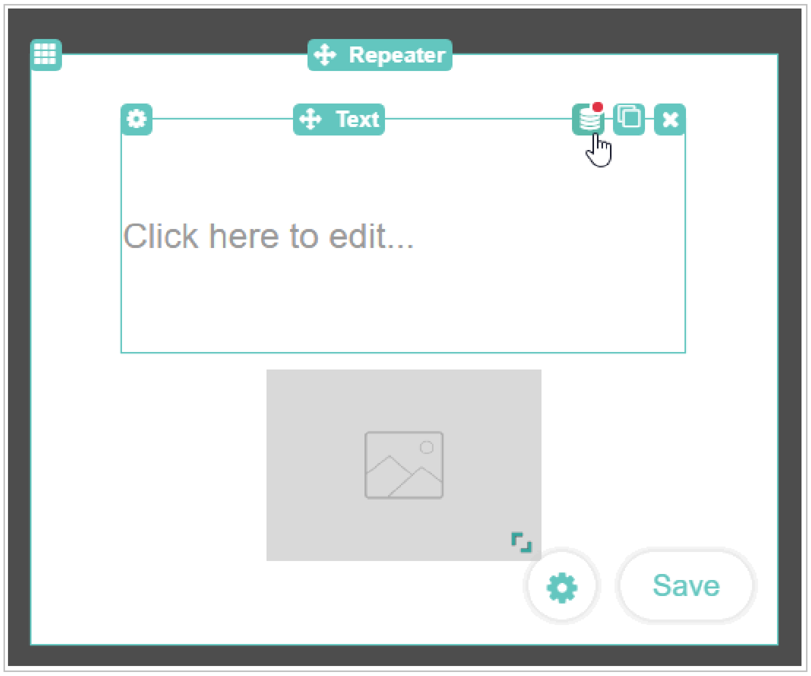
The mapping process for each part is described below.

4.1 Inserting mapped text

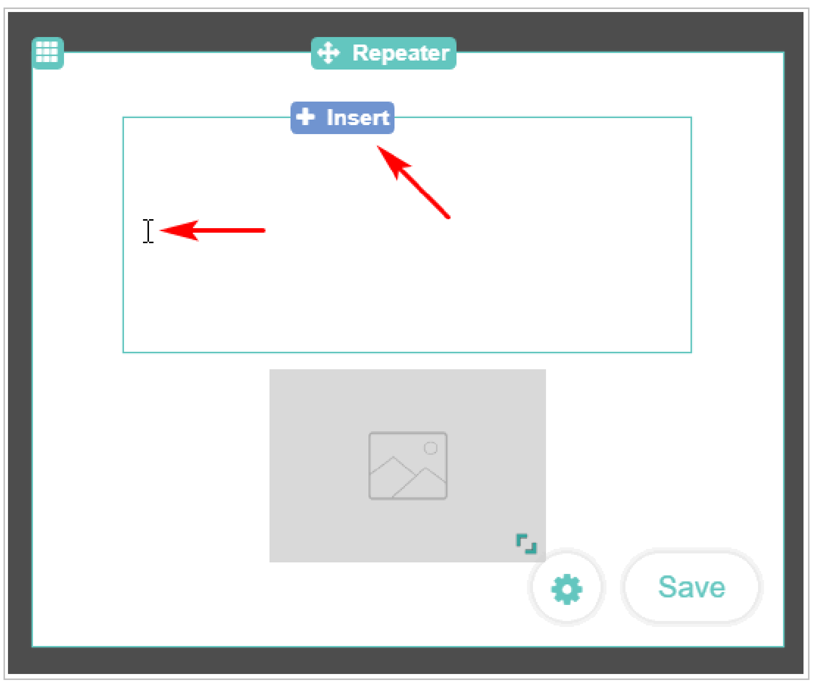
This step shows you how to place text inside a component and then map it to a data set.

> **Tip**
>
> Before mapping inline text on a Details template, be sure to connect the page to a data set. Otherwise, data fields won't appear in the Data Fields panel.

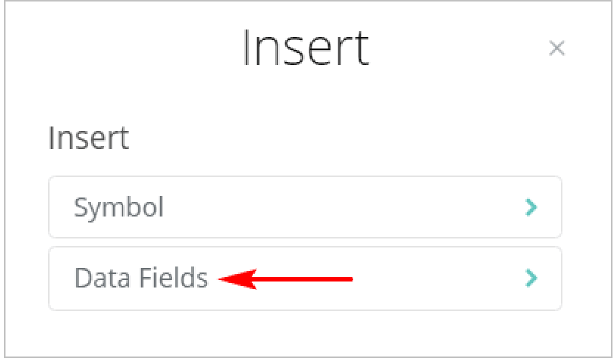
1. Drag a Text or Heading component to a web page. In the image below, we placed a Text component inside a Repeater component.



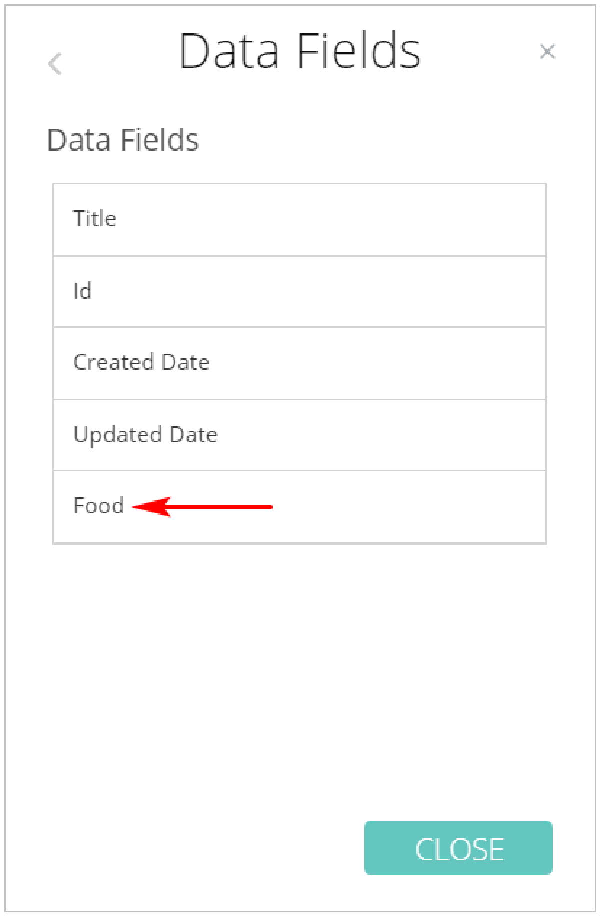
2. Click one time inside the component. The toolbar name changes to Insert.



3. Click the Insert tab on the toolbar. The Insert panel displays.

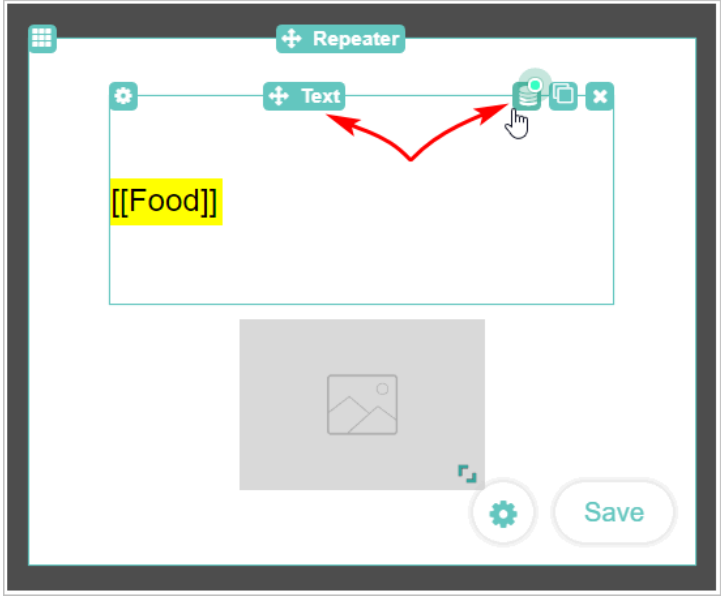


4. Click the Data Fields tab. The Data Fields panel displays.
5. Click the data field you want to map. In the image below, we select the Food field. The panel closes.



After the Data Fields panel closes, the screen returns to the component. Hover the mouse pointer on the component, and you notice three changes:

- a double square bracket with the name of the data field (e.g. [[Food]])
- the original component toolbar name (i.e. Text)
- a data set icon with a green light (indicates mapping)



4.2 Inserting inline text

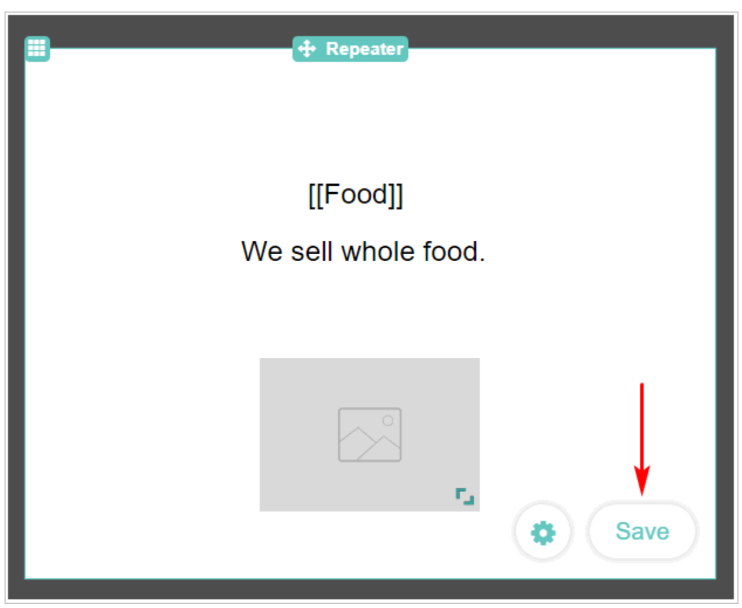
The next step is to insert the inline text. This is the text that appears unchanged on every template page.

1. Hover the mouse pointer on the component.
2. Click one time next to the data field. The toolbar name changes to Insert.

3. Type the text you want to be repeated for each item in the data set. In the image below we enter, "We sell whole food."

4. Highlight the text with the mouse pointer to open the black style toolbar.
5. Select an option (e.g. centre text).

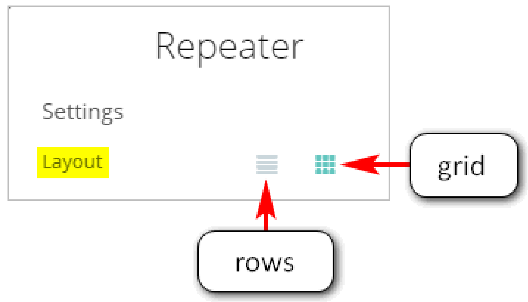
6. Click Save.



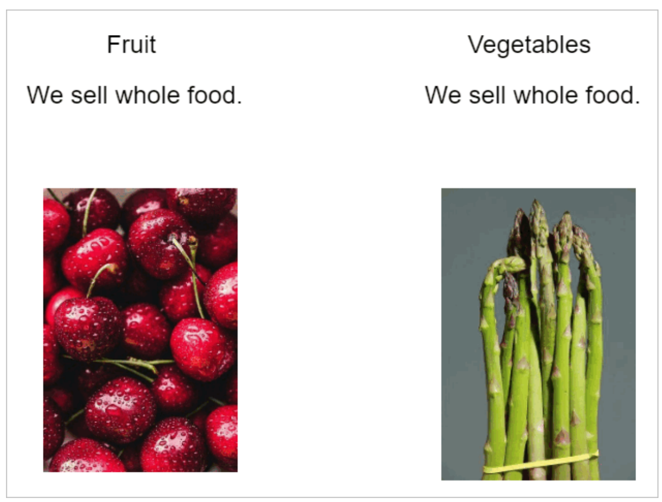
4.3 Results

If you use the Repeater component, customise the template layout by opening the Settings panel and selecting a layout option:

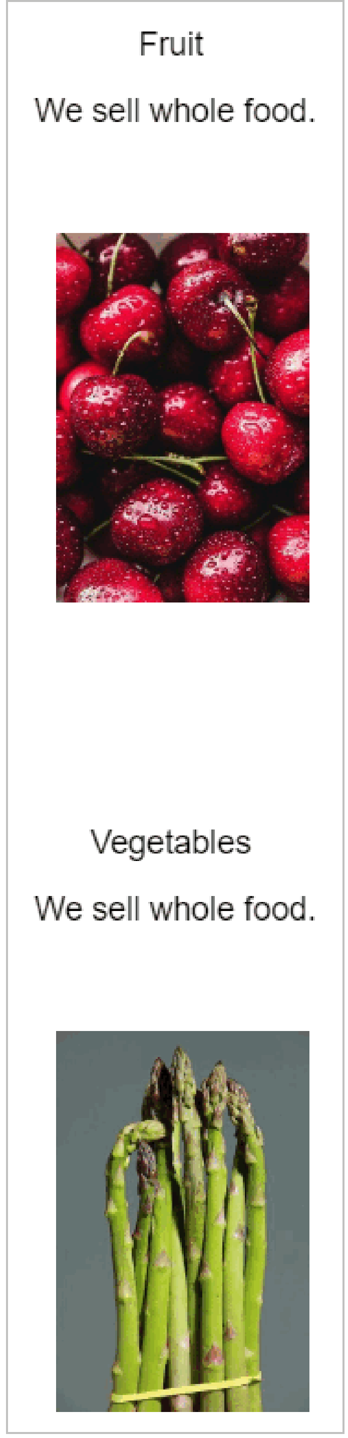
- Rows: displays content in a vertical line
- Grid: displays content horizontally.



Grid layout



Row layout



5 Previewing your work

To see your work before publishing, use the Preview tool.

1. Scroll up to the top of the Edit Content page.
2. Click Save and then Preview. The Preview panel displays.
3. See how your template page displays on desktop and mobile devices.
4. Return to the Edit Content area and make changes, as required.
5. Repeat Preview process.

6 Publishing your work

When you're satisfied with the template page mapping, text styles, design, and layout, scroll up to the top of the Edit Content page and then click Publish. For more information about publishing, see:

- Publishing Your Data Set

Was this article helpful?

✓ Yes   ✕ No

Related articles

- How to Create a Data Set Online
- How to Use Data Set Tools
- How to Create a Multi-Level Template Structure
- How to Create a Repeater Template
- How to Use the Filter Component

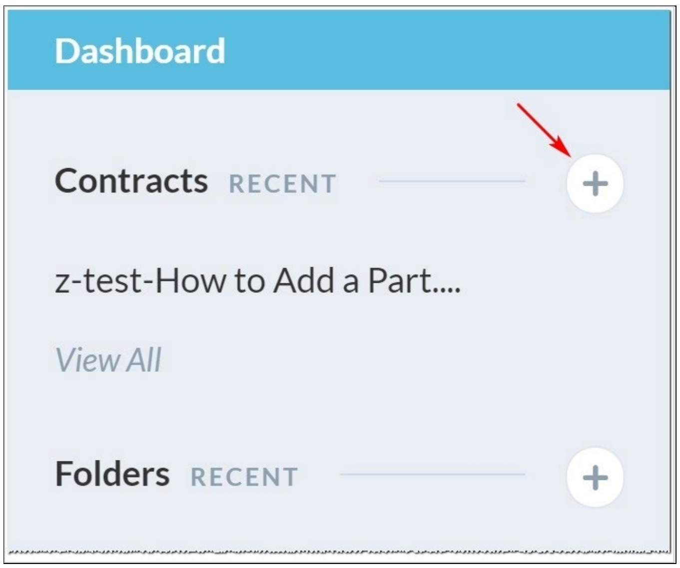
How to Upload a Contract

Centralize contract tracking on one platform.

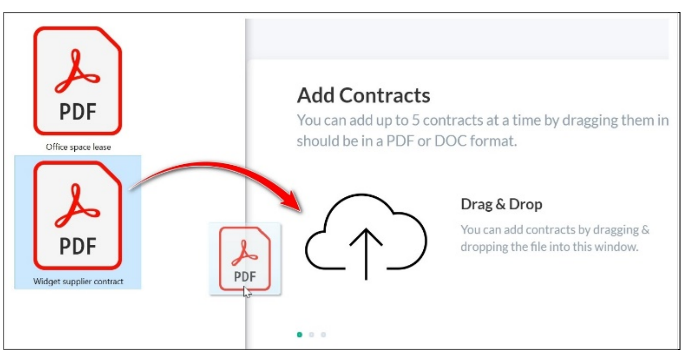
In this article, you learn how to upload a contract to Contract Hound. You also learn how to set user roles.

Uploading contracts from the dashboard

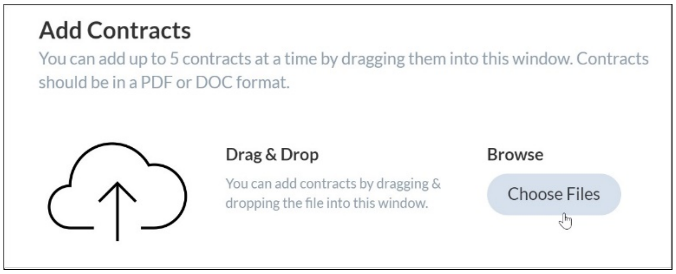
1. Go to the left menu and click the plus sign (+) next to Contracts.



2. Select an upload option on the Add Contracts page.
   - Use the drag and drop tool to upload documents from your computer.

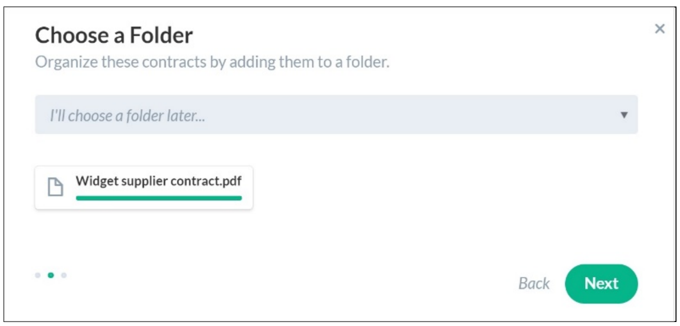


   - Click the Choose Files button to open the file manager and browse your device.



3. Repeat steps to add more contracts.
    - You can upload up to five contacts at one time.

4. After you select the contract, click Next.

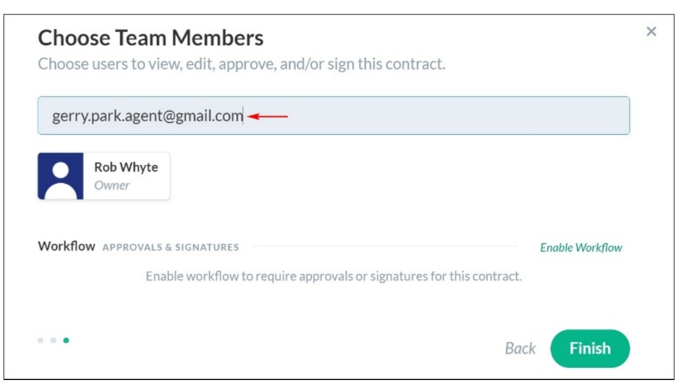


Granting permissions

After you upload a new contract, access is private by default. That means only the owner can access the contract.

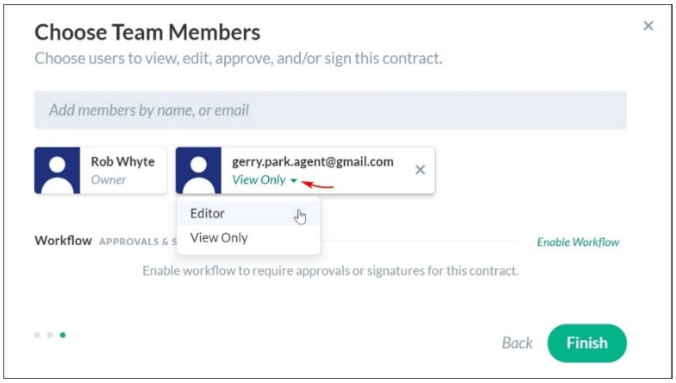
While you upload a contract, you can add team members and define user roles.
- You can add or modify team members and user roles later.

1. Enter a team member's email address in the field and then hit Enter.



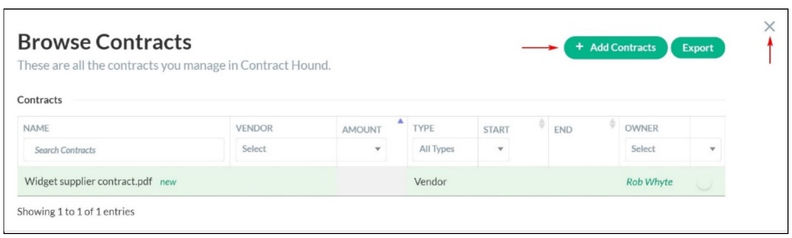
2. Click the arrow below the email address and select a user role.

- Select Editor or View Only.
- To learn more about user roles, click here.



3. Click Finish.

- The Browse Contracts page opens and lists all your contracts.



4. Click the Add Contracts button to upload another document.

5. Click the X icon to close the page and return to the dashboard.

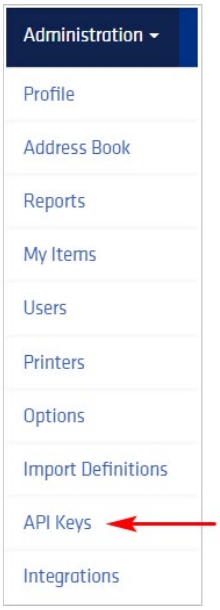
How to Integrate with Fastway

This article shows you how to integrate EIZ with your Fastway courier account.

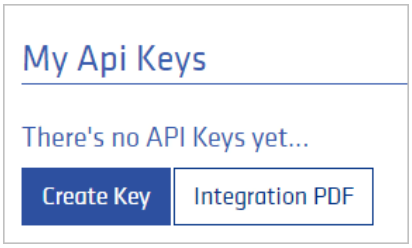
1 Locating your Fastway API key

Before starting this step, open Notepad (or another document app) on your computer. Create a file to save your Fastway API keys.

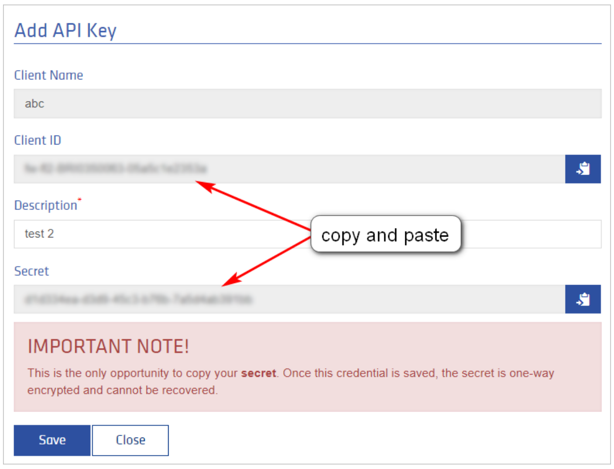
1. Log in to your Fastway account. The dashboard opens.
2. On the main menu, click Administration. A drop-down menu displays.



3. Click API Keys. The My API Keys page opens.



4. Click Create Key. The Add API Key page opens.

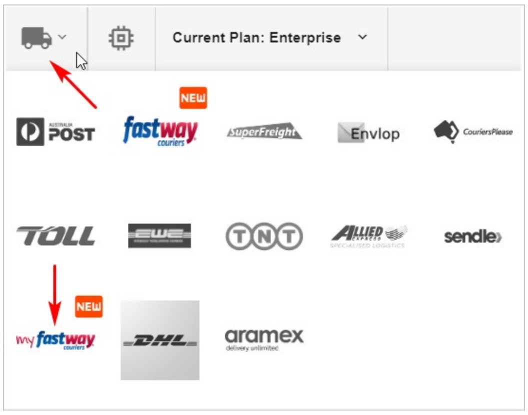


5. On the Add API Key page, enter a file name under Description.
6. Open Notepad on your computer.
7. Copy the Client ID and Secret number from the Add API Key page and paste them in the Notepad file.
8. Save the Notepad file for future use.
9. Click Save on the Add API Key page.

2 Installing the myFastway app

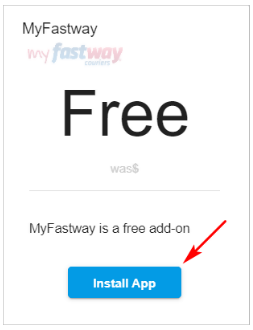
The next step is to activate the myFastway couriers plugin on your EIZ account.

1. Log in to your EIZ account. The dashboard opens.
2. Click the Courier icon in the top left corner of the dashboard. The courier plugin panel opens.
3. Click the myFastway couriers icon. A new page opens.

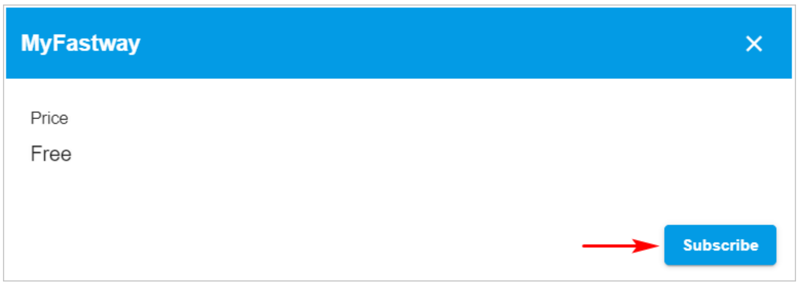


The courier plugin panel has two Fastway icons. *Fastway couriers* is for people with an older Fastway account. If you are a new Fastway account, select the *myFastway couriers* icon.

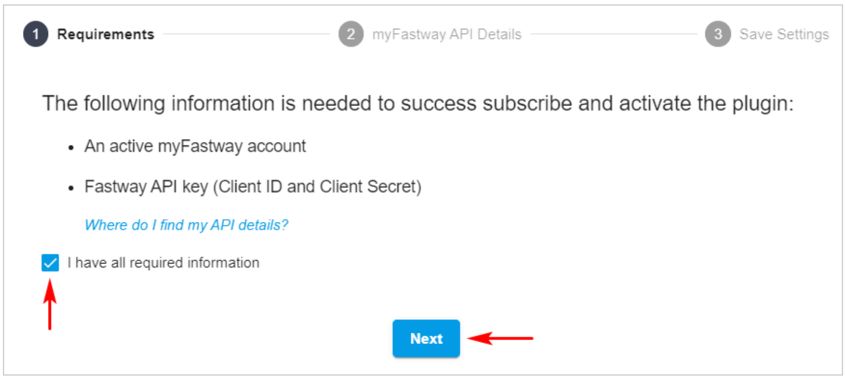
4. On the new page, click the Install App button. A new panel opens.



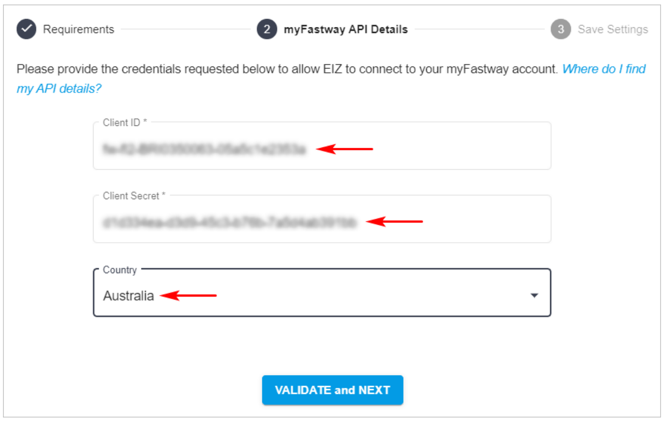
5. On the new panel, click Subscribe. The Account Settings page opens.



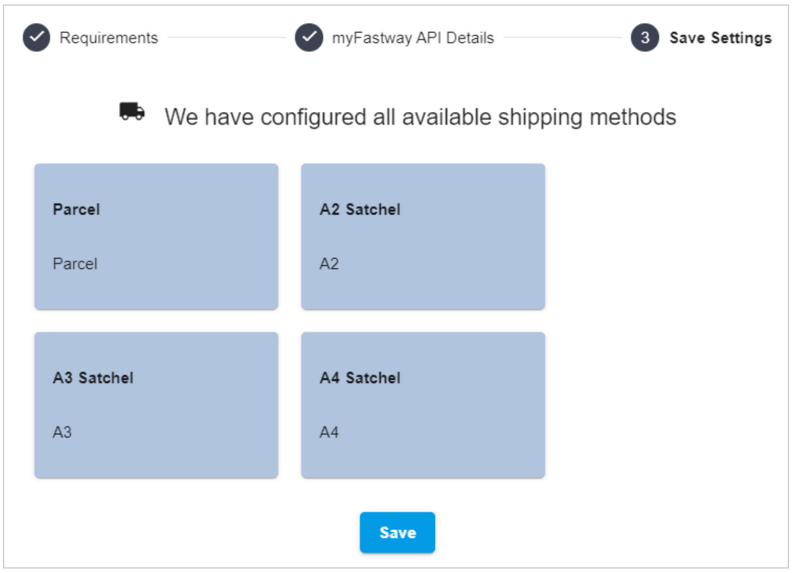
6. On the Account Settings page, check the box next to I have all the information.
7. Click Next. The myFastway API panel opens.



8. On the myFastway API panel, paste in the Client ID and Secret number from your Notepad file.



9. Select a location from the drop-down menu: Australia or New Zealand.
10. Click VALIDATE and NEXT. After validating the API key, the Save Settings panel opens. It shows the courier options available.
11. Click Save. The panel closes and the Account Information page opens.



Your myFastway service is ready. All myFastway rates will automatically work with EIZ through the API.