

Key Attribute Mapping – AE Practice Manager (AE PM)

Key client details which are displayed on each client's **Main** tab are now also linked to an **Extra** field. The fields are:

- Date of Birth (D.O.B)
- Inland Revenue Department (IRD)
- Balance Month

This allows you to more easily maintain the details and is particularly useful if your practice also uses AE Tax. To integrate successfully to AE Tax, these fields must conform to a particular format.

The areas affected by Key Attribute Mapping are:

Client Main Tab

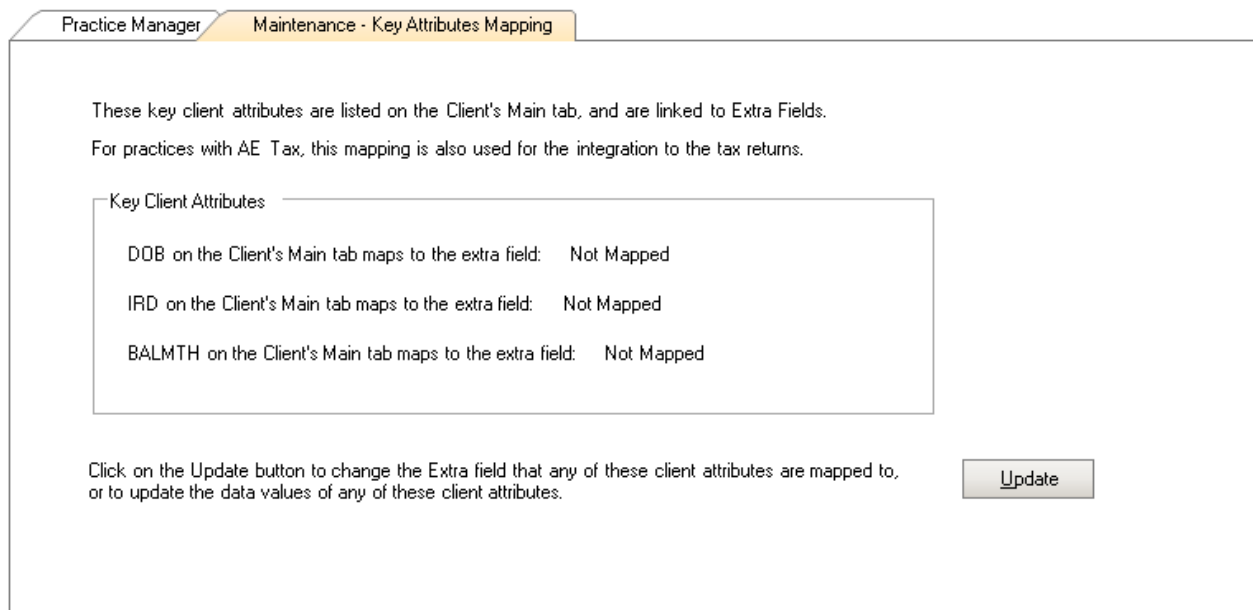
Data entered into the Date of Birth (DOB), IRD or Balance Month fields on the **Main** tab are displayed automatically in the mapped fields on the **Extra** tab. Similarly, when these values are entered on the **Extra** tab, they are displayed automatically on the **Main** tab.

Create Client Changes

The **Add New Client** Wizard has been updated to include the IRD and Balance Month fields.

New Key Attribute Mapping Window

The mapping between the fields on the **Main** tab and the **Extra** tab of the client is set using the Key Attributes Mapping window found in **Maintenance > User Defined > Key Attributes Mapping**.



The screenshot shows a software window titled "Practice Manager" with a sub-tab "Maintenance - Key Attributes Mapping". The window contains the following text:

These key client attributes are listed on the Client's Main tab, and are linked to Extra Fields.
For practices with AE Tax, this mapping is also used for the integration to the tax returns.

Key Client Attributes

DOB on the Client's Main tab maps to the extra field:	Not Mapped
IRD on the Client's Main tab maps to the extra field:	Not Mapped
BALMTH on the Client's Main tab maps to the extra field:	Not Mapped

Click on the Update button to change the Extra field that any of these client attributes are mapped to, or to update the data values of any of these client attributes.



All users must run the Key Attributes Mapping and Data Update wizard to map each Key Client Attribute before starting work in AE PM 4.5.

To Map Key Attributes

1. Select **Maintenance > User Defined > Key Attribute Mapping**.
2. Click **Update** if you want to map or re-map DOB, IRD or Balance Month using the **Key Client Attributes Mapping and Data Update** wizard.

Step 1, **DOB mapping and data update** opens.

3. Select the most appropriate **Extra** field from the drop-down.

Note: If none of your existing Extra fields listed are appropriate, select the last item, **Create a new Extra field**. This will create a new field named **DOB**.

4. Read the three options under **Update the data values for DOB** and select the most appropriate.

Note: The first of these options is only valid when **Practice Manager Plus** is installed.

5. Click **Next** to advance to the next step.

Step 2, **IRD mapping and data update** opens.

6. Select the most appropriate **Extra** field from the drop-down.

Note: If none of your existing Extra fields listed are appropriate, select the last item, **Create a new Extra field**. This will create a new field named **IRD**.

7. Read the three options under the **Update the data values for IRD** and select the most appropriate.

Note: The first of these options is only valid when **Practice Manager Plus** is installed.

8. Click **Next** to advance to the next step.

Step 3, **Balance Month mapping and data update** opens.

9. Select the most appropriate **Extra** field from the drop-down.

Note: If none of your existing Extra fields listed are appropriate, select the last item, **Create a new Extra field**. This will create a new field named **Balance Month**.

Note: If you have setup the Balance Month **Extra** field as a **Custom Category**, it will change to a **Custom Field** as a result of the Key Client Attribute mapping process. No information is lost as a result of this change.

10. Read the three options under the **Update the data values for Balance Month** and select the most appropriate.



Note: The first of these options is only valid when **Practice Manager Plus** is installed.

11. Click **Next** to advance to the next step.

Step 4, **Mapping confirmation** opens.

12. Review the selections displayed.

13. If you want to change one or more of your selections:

- a) Click **Back** until the first selection you want to change is displayed.
- b) Make your changes and click **Next**.
- c) Repeat for any other changes.
- d) Click **Next** until you re-open Step 5, **Mapping confirmation**.

14. Click **Finish** to save your changes and close the wizard.

Security Added for Key Attribute Mapping

Only SuperUsers have access to Key Attributes Mapping (**Maintenance > User Defined > Key Attributes Mapping**).

Product	Group Description	Task Permission	Default access for all users
Central	Maintenance	[Maintenance] [User Defined] [Key Attributes Mapping	No