The Default Folder Tool provides the ability to create mappings between SoftPro Select and your Smartview folders. These mappings can be utilized by other applications so that when publishing documents and reports manually or through automation, a default Smartview folder mapping can be designated. The Smartview Default Folder User Guide is also available as an additional resource.

> **NOTE**: The Default Folder Tool is permission based. If the Default Folder Mapping button is not active on the **SP Tools** ribbon and you should have access, contact the SoftPro Helpdesk via a ServiceNow ticket.

Quick Selections:

- 〉 **Creating a new Mapping**
- 〉 **Deleting/Removing mapped Documents/Reports**
- 〉 **Editing an Existing Mapping**
- 〉 **Copying an Existing Mapping**

Creating a New Mapping

1. Verify the **Current Profile** is set to the profile needed to access the available documents and reports trees for mapping.

   In our example, if **Default\P\FL** is selected, all documents/reports for the three sub-profiles are accessible for mapping. If a sub-profile is selected (i.e., **Default\P\FL\NA-OAC**), only those accessible to this profile are available for mapping.
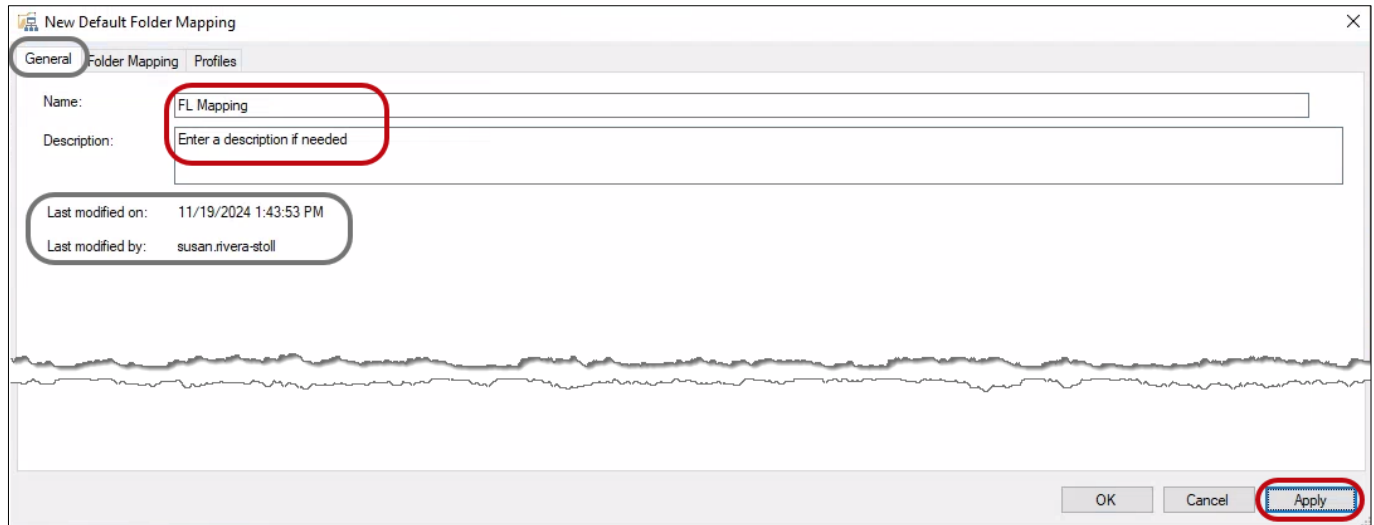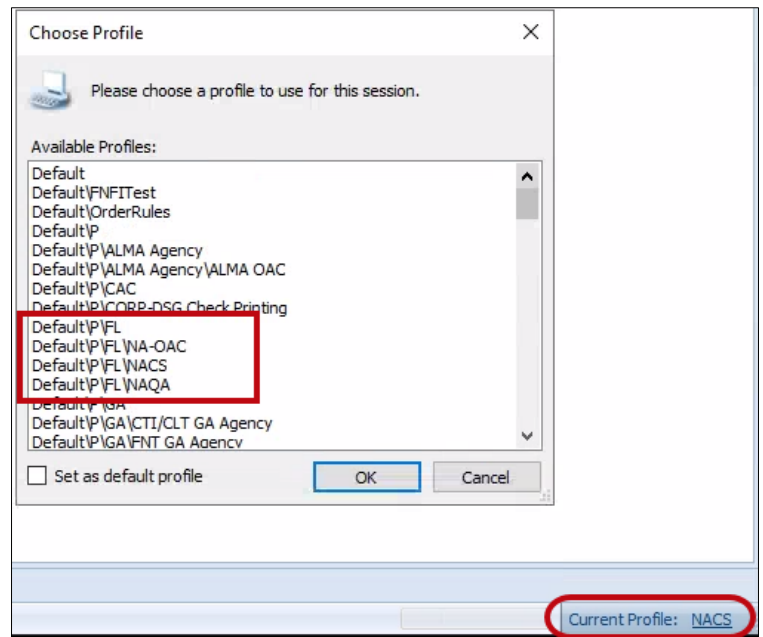

2. From the **SP Tools** ribbon, click the **Default Folder Mapping** button to open the **Default Folder Mapping** tab
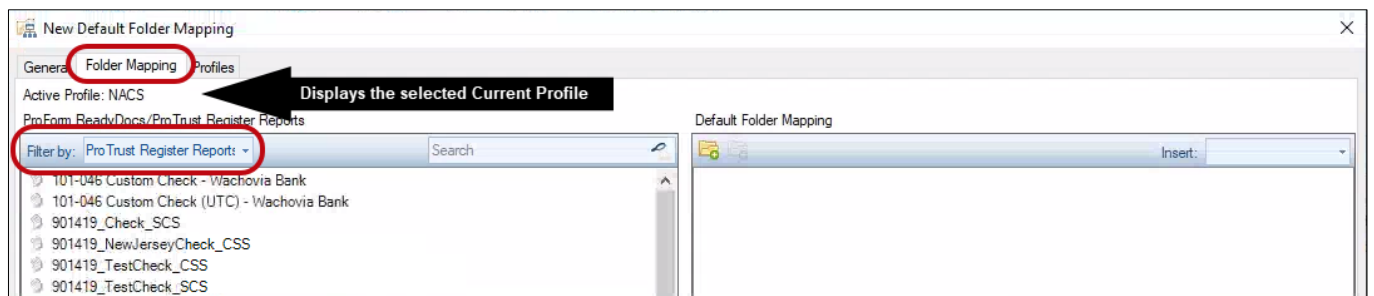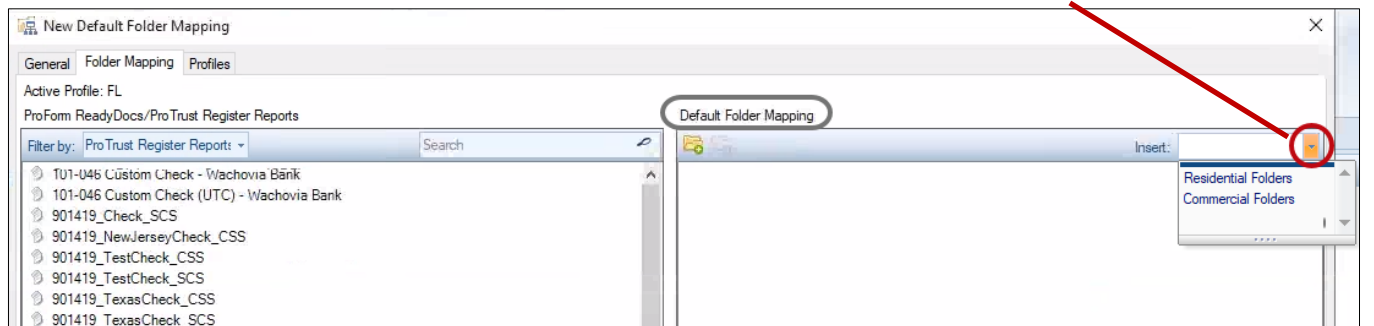
From the **General** tab,

1. Enter a unique **Name** for the mapping

2. Enter a **Description** (optional)

3. Click the **Appy** button; the **Last modified on** and **Last modified by** fields populate with the current date/time and current logged in user

4. Click the **Folder Mapping** tab

5. From the **Filter by** drop-down, select **ProTrust Register Reports**; this provides the available reports to be mapped listed in alphabetical order
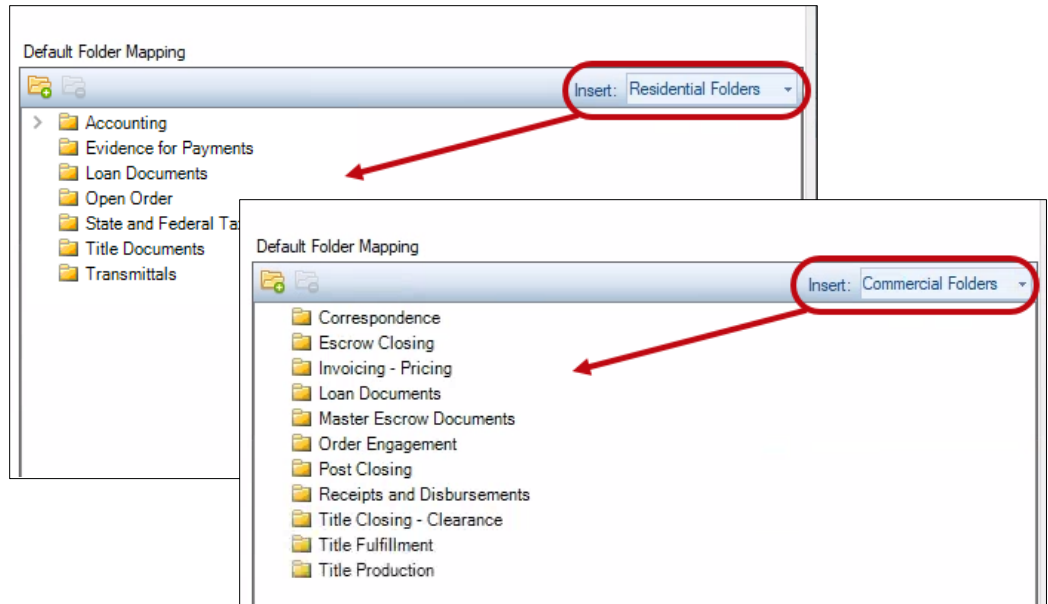

6. Select the Folder tree from the **Insert** drop-down under the **Default Folder Mapping** section (right side)
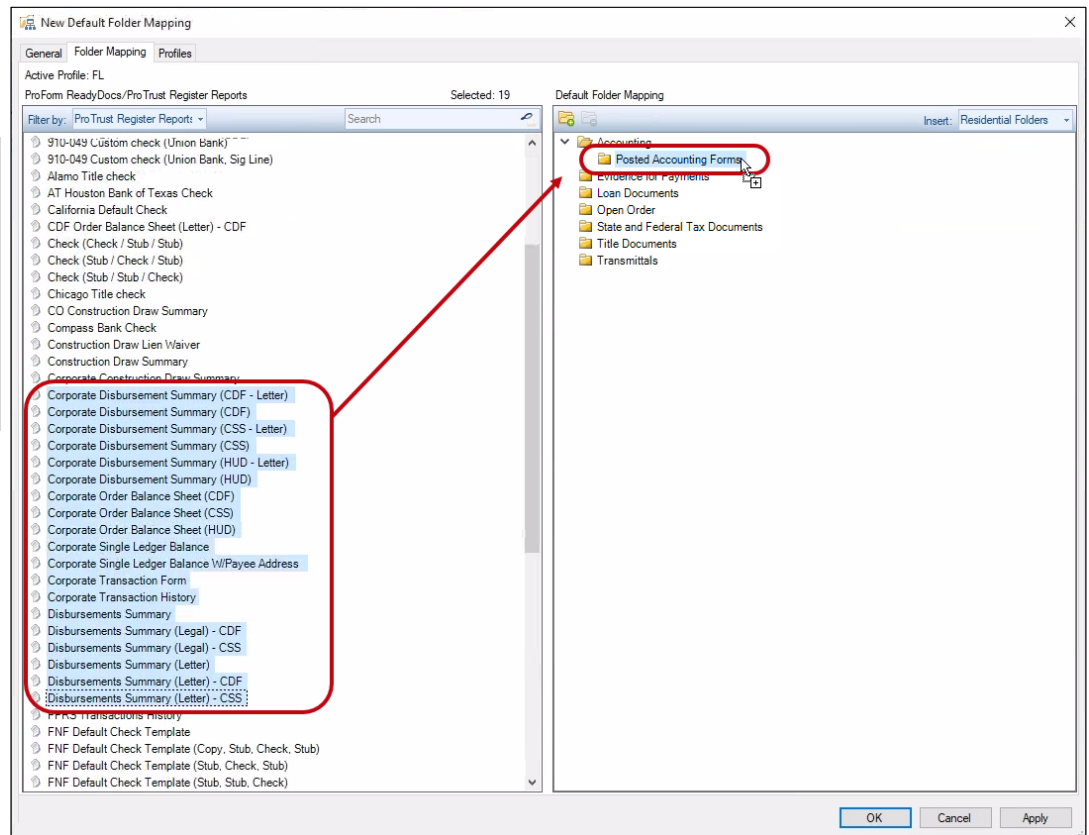
Once a folder tree is selected, the corresponding folders are displayed.

7. Select the reports to be mapped on the left

   HINT: You can select individual reports by clicking on the report or using the CTRL key or CTRL + Shift keys to select multiple reports.

8. Drag and drop the selected reports on the left to the **Posted Accounting Forms** folder on the right
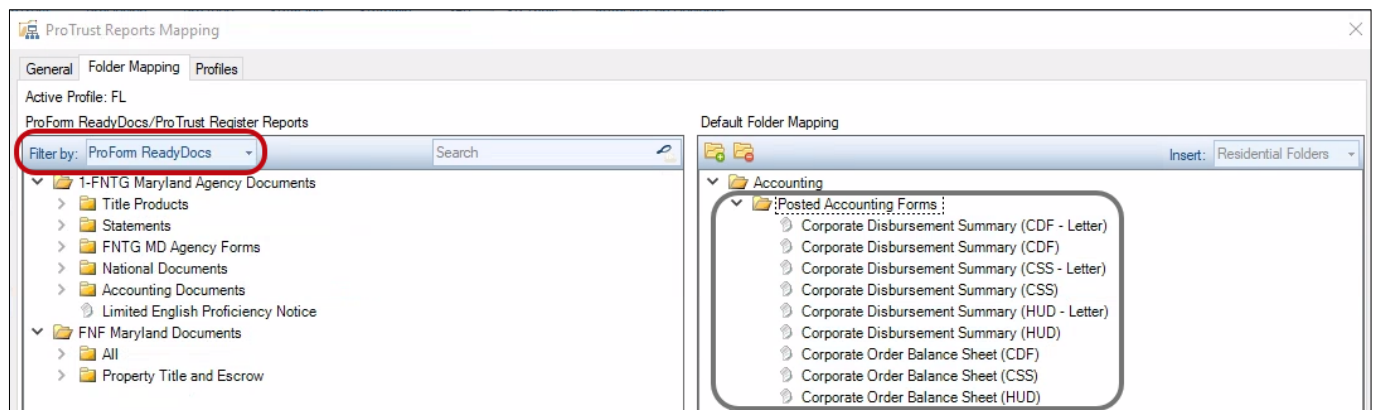
The selected reports now appear under the **Posted Accounting Forms** folder. The selected reports remain visible on the left but are now disabled to indicate they have been mapped already.
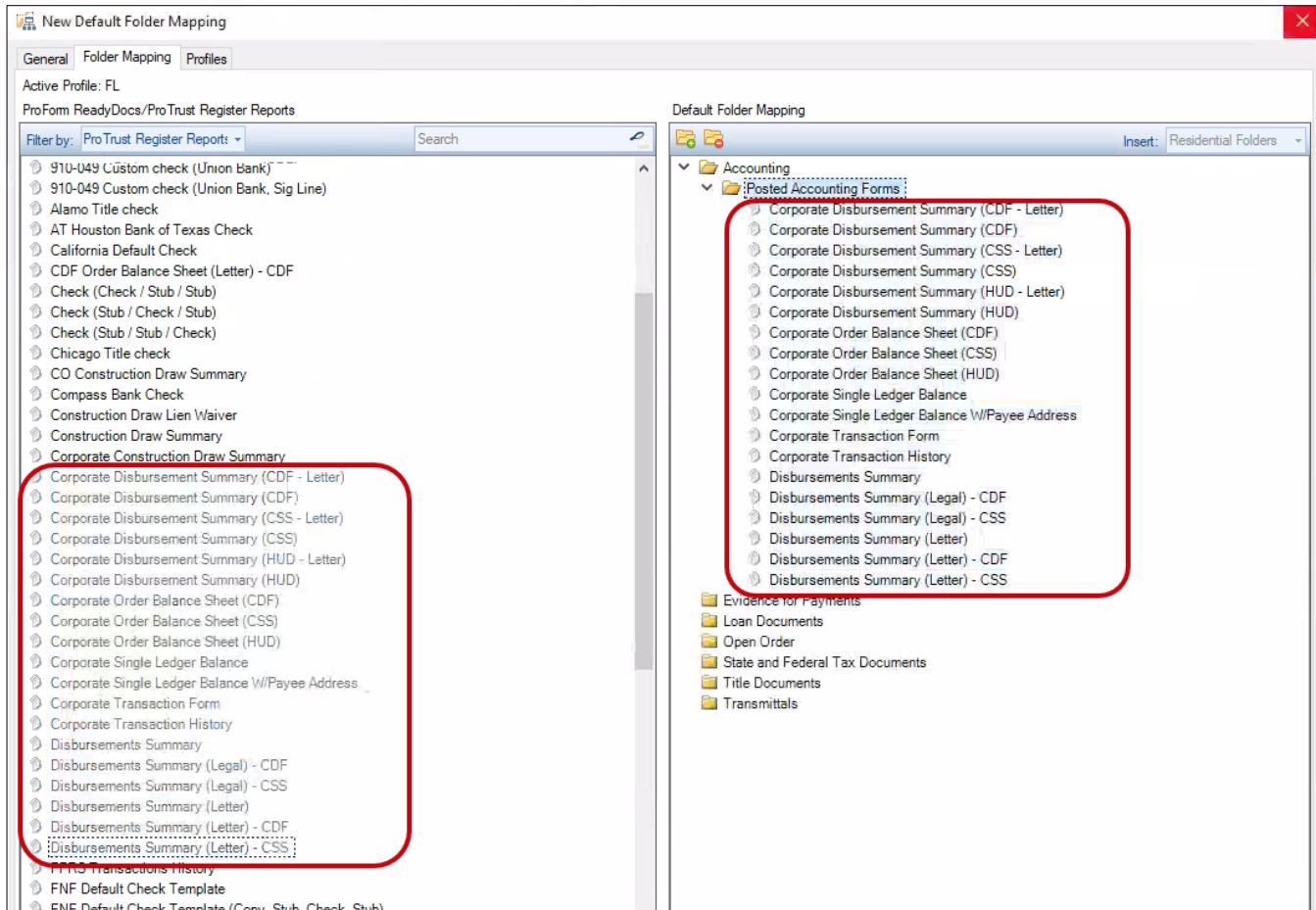
Once the **ProTrust Register Reports** are mapped, you can now map documents.

9. From the **Filter by** drop-down, select **ProForm ReadyDocs**

NOTE: The **ProTrust Register Reports** continue to be visible in the selected folder. If you wish, the folder containing the reports can be closed.

10. Select the documents to be mapped expanding folders as needed

When deciding which documents to map,

> selecting a folder maps all documents contained within the folder

> if the document is found in multiple folders, it is not necessary to map each; selecting it once maps all iterations of the document
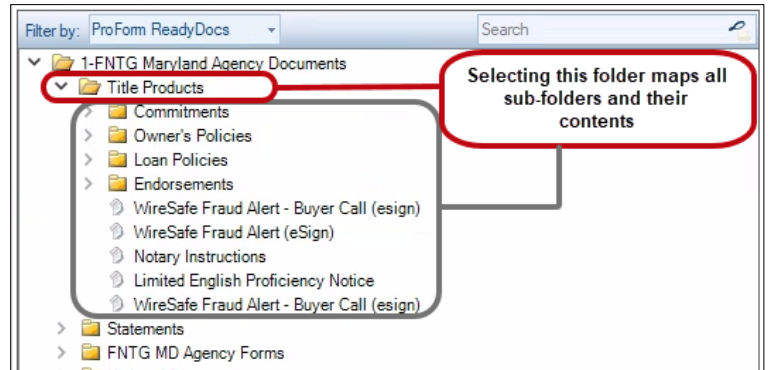
11. Drag and drop the selected documents to the applicable folder on the right

In this example, we want all of the **Title Product** documents assigned to the **Title Documents** folder. Once the Title Products folder is selected, all its contents are highlighted.
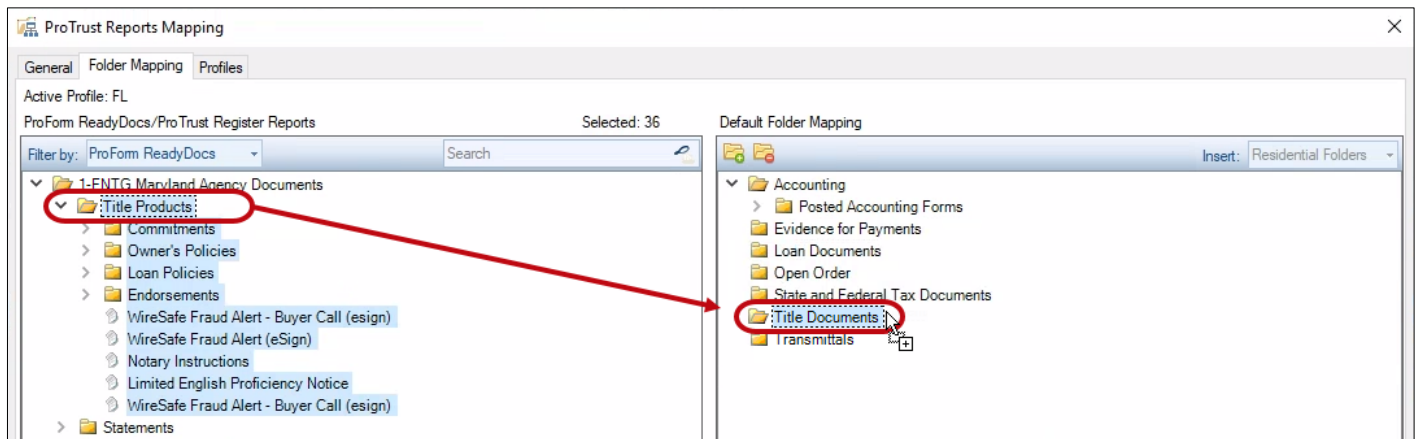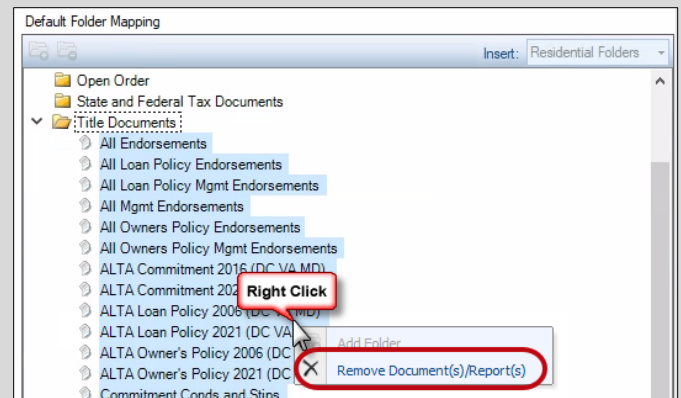

12. Repeat **step 11** for the documents you wish to map

NOTE: If mapped document(s)/report(s) need to be removed,

1. right-click on the document(s)/report(s) on the right

2. select **Remove Document(s)/Report(s)** from the menu

The selected document(s)/report(s) are removed and are now available again in the folder tree on the left.
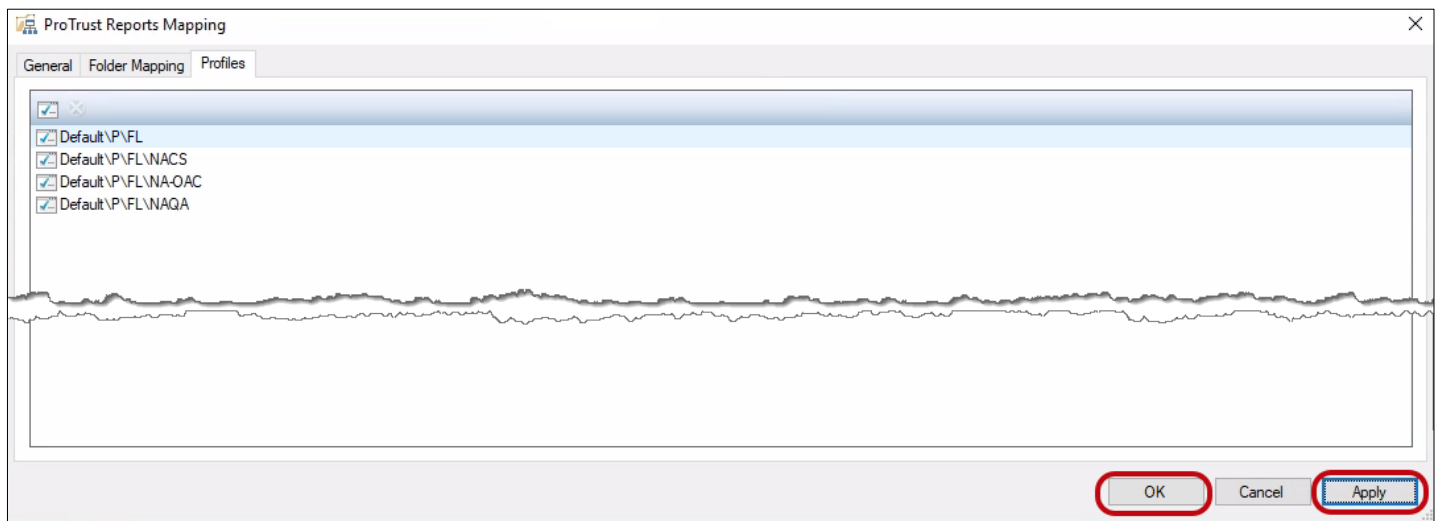
Once all documents have been mapped,

13. Click the **Profiles** tab to assign profiles to the mapping

14. Click the **Assign Profiles** ☑ icon

15. From the **Assign Profiles** dialog, select the profiles you wish to assign

16. Click the **OK** button to close the dialog
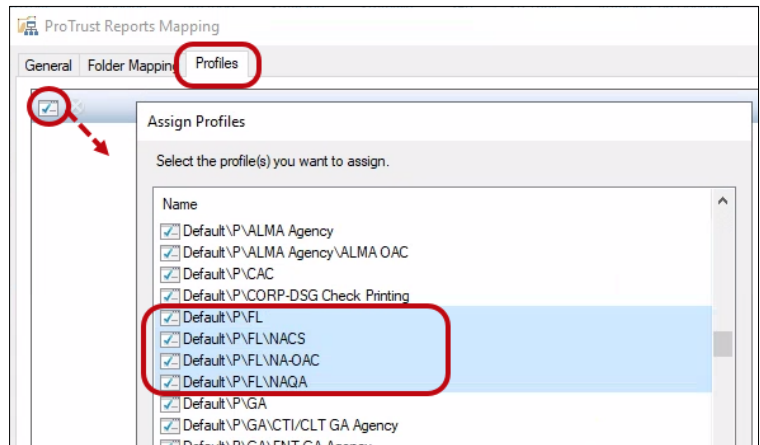
To save the newly created mapping,

17. Click the **Apply** button

18. Click **OK**

The newly created mapping is shown in the list of current mappings.

Name	Description	Last Modified On	Last Modified By
9/24 Test	Test description	9/25/2024 10:27:36 AM	Betsey.McCarthy
Doc Save Tree	Kurt was here	11/13/2024 1:46:19 PM	Kurt.Klassen
FL Mapping	Enter a description if needed	11/19/2024 11:25:20 AM	susan.rivera-stoll
test		9/25/2024 10:22:36 AM	Betsey.McCarthy
Test Mapping SMRS	Test mapping for documentation.	9/24/2024 10:15:18 AM	susan.rivera-stoll
Test111224		11/12/2024 3:30:27 PM	Betsey.McCarthy
Testing One		11/7/2024 6:07:30 AM	6131370
Tree new		10/18/2024 4:25:50 AM	6140072

Editing Existing Mappings

From the **Default Folder Mapping** tab,

1. Right-click the mapping to review or edit

2. Select **Properties** from the menu

3. Click the tab applicable to edit needed

4. Follow the corresponding steps in **Creating a New Mapping** based on the edit needed (i.e., adding/removing documents/reports, assigning a profile, etc.)
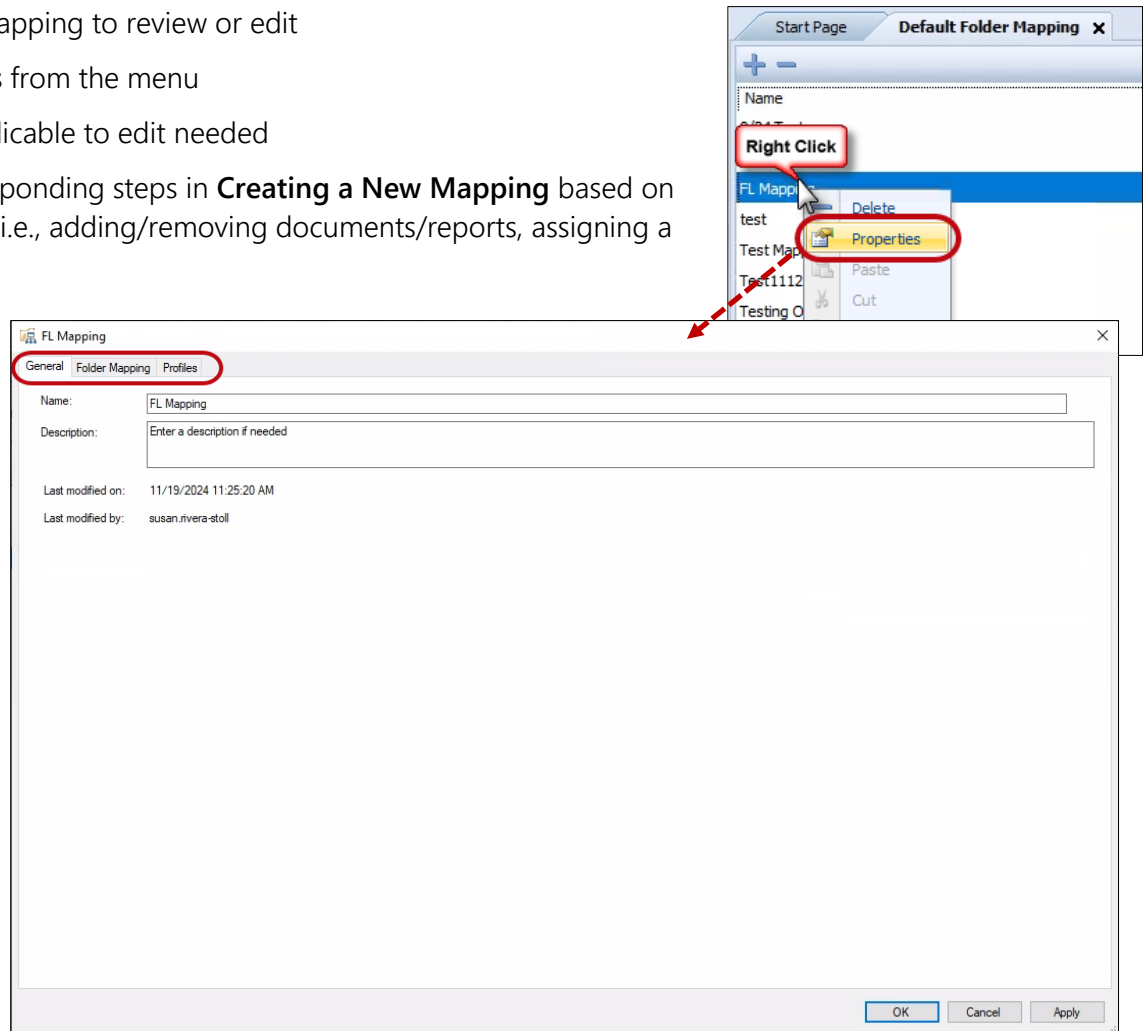
Copying Existing Mappings

To copy a saved mapping from the **Default Folder Mapping** tab,

1. Right-click on the mapping to be copied and select **Copy** from the menu

2. Right-click in the white space on the **Default Folder Mapping** tab and select **Paste**

3. In the **Mapping Name** field, enter a new unique name for the copied Mapping

4. Click the **OK** button to save (or **Cancel** to close the dialog and not save the copied Mapping)
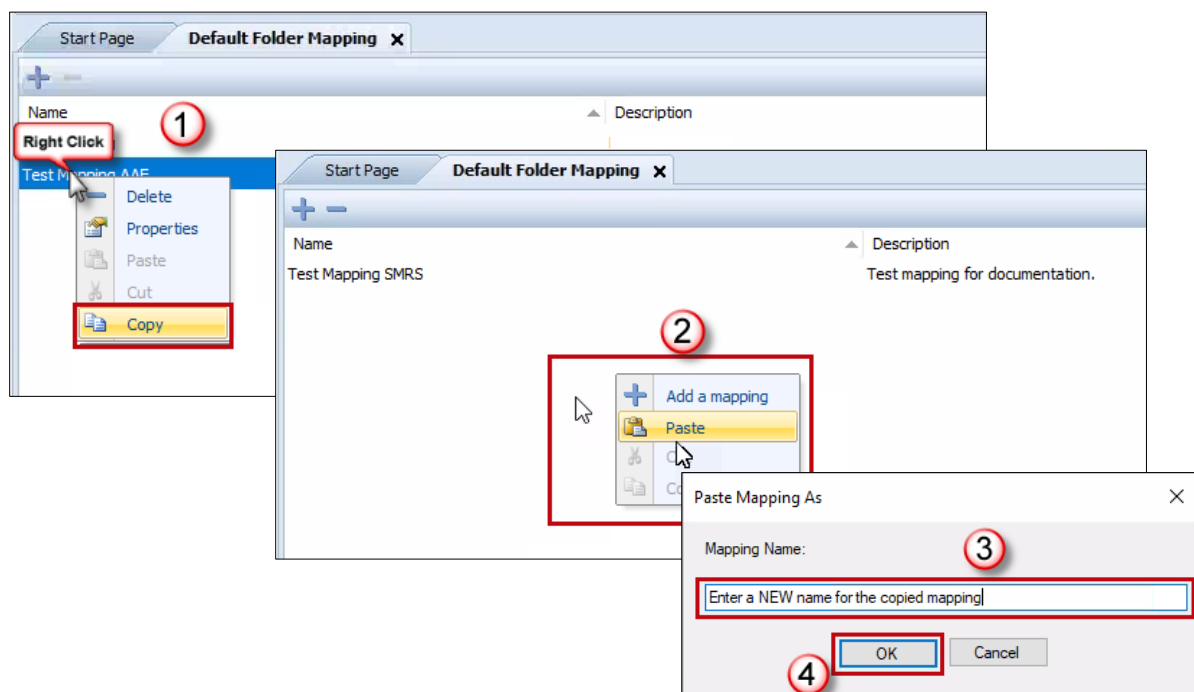
NOTE: The Profile data associated with the original mapping is not copied over. Profiles cannot be associated with more than one mapping.

5. Right-click on the newly copied mapping and select **Properties** from the menu
6. Click the **Profiles** tab to associate Profiles for the newly copied mapping