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How to Use Link to Fill (Contact Data Capture)

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How to Use Link to Fill (Contact Data Capture)

The **Link to Fill** feature in **Yao** provides a secure method for capturing comprehensive information from clients through a dedicated portal. There are instances where clients or potential clients are in a rush on the phone and provide only minimal data; this function allows you to send them a snapshot of their contact card, which gives them the ability to populate your records with full and correct information at their own convenience. This process ensures your data remains accurate while maintaining a professional, user-centric experience.

Prerequisites

- The contact must already exist within the **Yao** system.
- The contact must have a mobile number assigned to their contact record to authenticate this process.


Generating the Secure Data Capture Link

1. In the left-hand navigation menu, select the **Contacts** tab.


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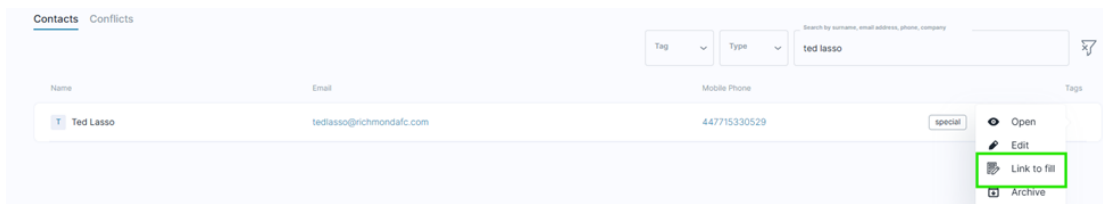
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2. Locate the specific contact record which requires additional information.
3. On the far right of the contact row, click the **Ellipses (three dots)** icon to open the actions menu.
4. Select the **Link to Fill** option. A *Share Contact Form* dialogue box will appear.



5. In the **Invite link to fill in the following information** dropdown menu, select the desired link duration, such as **3 hours, 6 hours, 1 day or 3 days**.
6. Click the **Copy Link** button located in the bottom-right corner of the window. A *confirmation message* stating "URL copied to clipboard" will appear at the top of the screen.

Client Verification Journey and Data Entry

Once the client receives and opens the link, they must complete a secure validation process to access the form.

1. On the **Verify Your Identity** screen, enter the registered **Mobile Phone Number**.

The image shows a mobile application screen titled 'Verify Your Identity'. At the top, there is a circular icon with a blue checkmark. Below the title, there is a paragraph of text: 'To protect your personal information, please enter your registered mobile phone number. We will send you a verification code via SMS.' Below this text is a text input field with the placeholder text 'Mobile Phone Number'. Underneath the input field, there is a smaller line of text: 'Enter the mobile number registered with your account'. At the bottom of the screen, there is a button with a blue checkmark icon and the text 'Send Verification Code'.

2. Click the **Send Verification Code** button.
3. Enter the 4-digit **Verification Code** received via SMS.
4. Click the **Verify Code** button. *The contact form will load upon successful validation.*