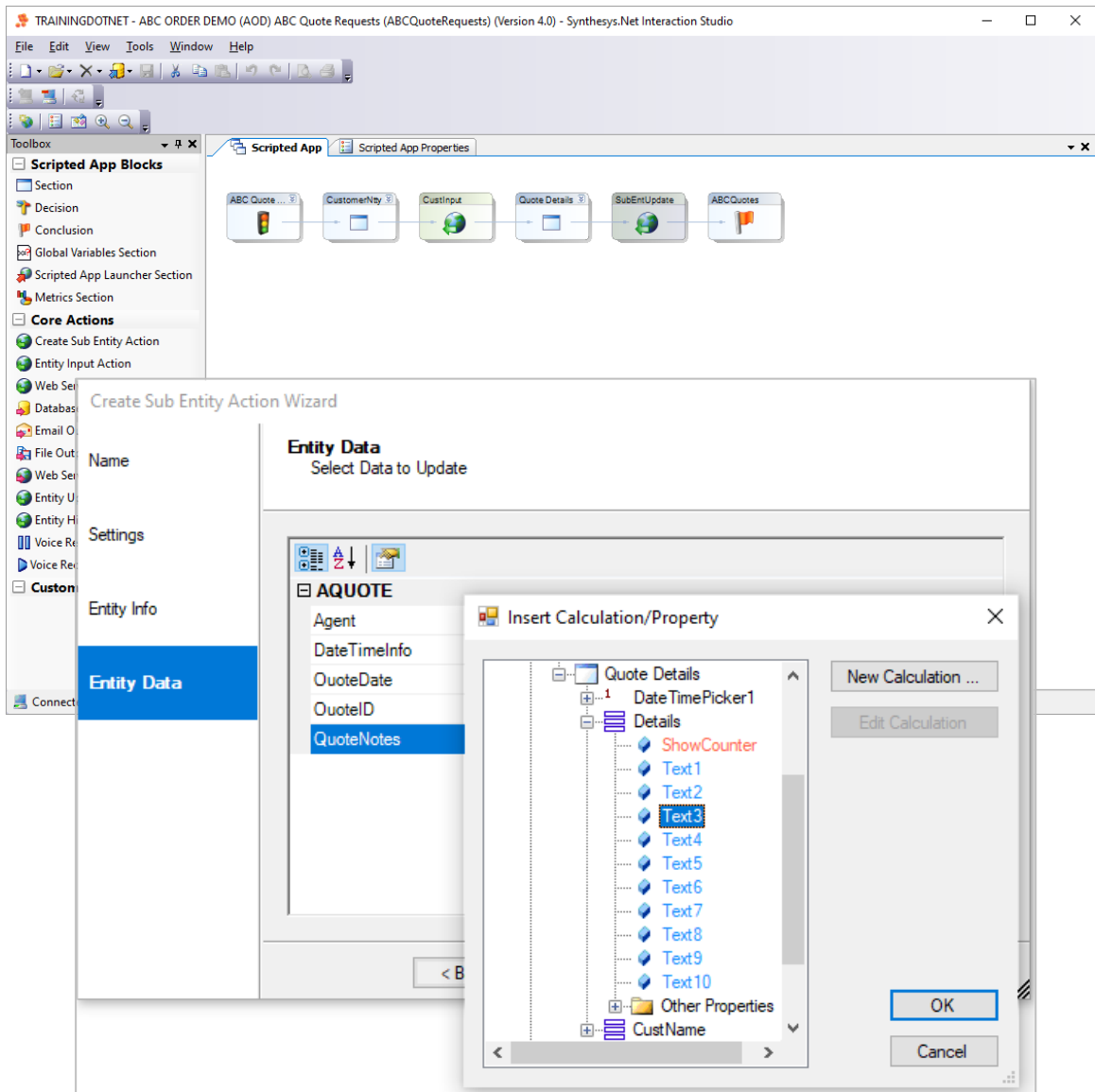


Sub Entity Action



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PASSING DETAILS FROM CHILD TO PARENT ENTITY

Using the **Sub** Entity Action, together with the Entity Input Action, web controls and calculations, you can pass information from a child (sub) Entity back to the parent (primary) Entity and history table.


For your customer contact, you could, for example, use two Entities to manage the data, a primary (parent) Entity ABCORD, and a sub (child) Entity AQUOTE. You can then use two scripted apps, the first to deal with product orders, the second to handle associated quotes.

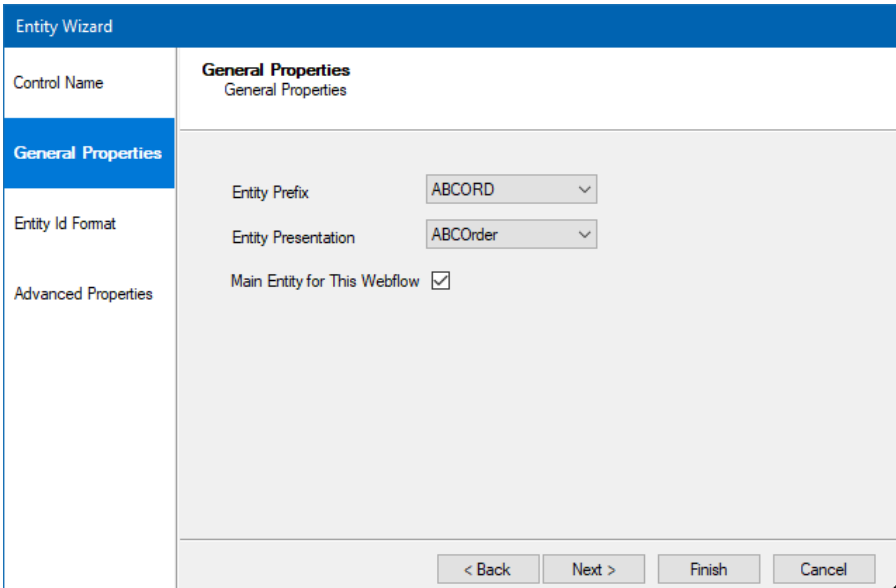
In this example we will look at the design of the second, Quotes scripted app.

Adding Primary Entity to Quotes Scripted App

To begin, create a CustomerID parameter in the Scripted App Properties section.

Next, add a new Customer section, with access to the primary Entity (ABCORD), typically with access to the essential customer data.

- Pick up the  **Entity** control from the *Core Controls* section, drop it into the section design area and enter a descriptive **Control Name**.



Entity Wizard	
Control Name	General Properties General Properties
General Properties	Entity Prefix: ABCORD Entity Presentation: ABCOrder Main Entity for This Webflow: <input checked="" type="checkbox"/>
Entity Id Format	
Advanced Properties	
<input data-bbox="730 1556 826 1579" type="button" value=" < Back "/> <input data-bbox="842 1556 938 1579" type="button" value=" Next > "/> <input data-bbox="954 1556 1050 1579" type="button" value=" Finish "/> <input data-bbox="1066 1556 1161 1579" type="button" value=" Cancel "/>	

In the **General Properties** dialog of the Entity wizard

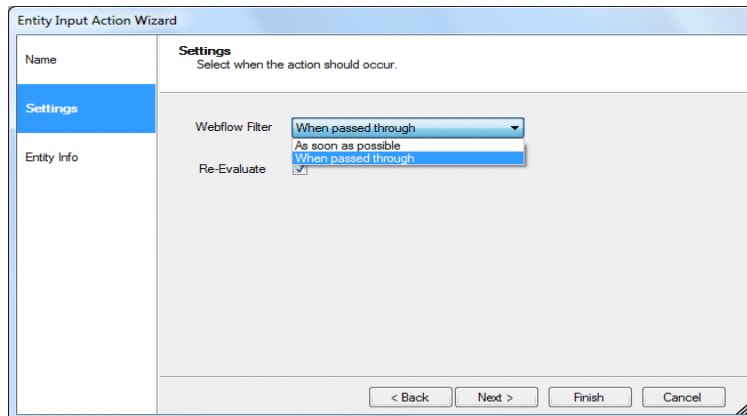
- Link the **Entity Prefix** to the primary/ parent Entity ABCORD.
- Select the Entity Presentation to be used when displaying the control at run time in the Agent Portal.
- Tick the **Main Entity for This Webflow** check box.
- In the Advanced Properties page (General), link the EntityID to the CustomerID parameter, as created earlier in the Scripted App Properties section.

Entity Input Action

The **Entity Input Action** allows access to all or selected CRM Entity details, for use within a scripted app in calculations, the dashboard and/ or to enable branching.


To add the **Entity Input Action** to your Scripted app

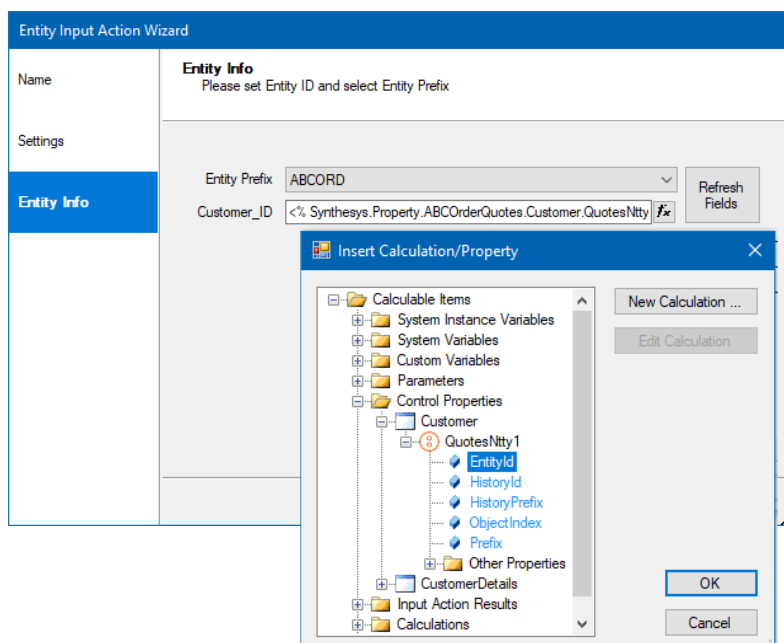
- Pick up the **Entity Input Action** from the *Core Actions* toolbox, add it to the *Section* design area and enter a descriptive **Name**.
- In the **Settings** page, select **When passed through** and tick the **Re-Evaluate** box to allow for data to be changed and updated at run time



Entity Info


In the **Entity Info** page

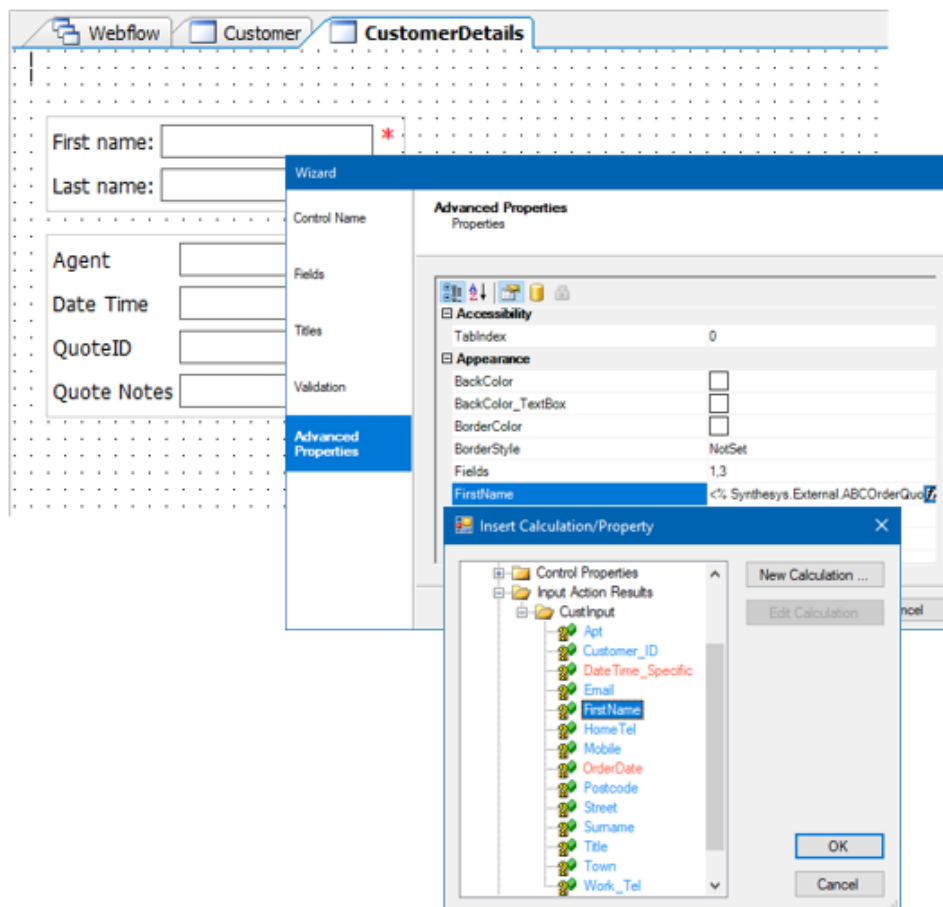
- Link the Entity Input Action to the primary (parent ABCORD) **Entity Prefix**.
- Click the calculation  icon to open the *Insert Calculation Property* dialog, go to Control Properties folder and link the *Customer_ID* to the **Entity ID** of the Ntty Entity control in the scripted app.



Web Control Configuration

Next, drop a new *Quote Details* section to the scripted app and add any web controls, as required, to display existing and capture any new information associated with the Quotes that you wish to write back to the primary Entity.

- To fill web control fields with already existing information, such as the customer's first and surname, go to the **Advanced Properties** page of the control.
- Use the calculations  icon to open the *Insert Calculation Property* dialog, go to the **Input Action Results** folder and pick up the fields that contains the relevant customer/ entity information.





Sub Entity Action

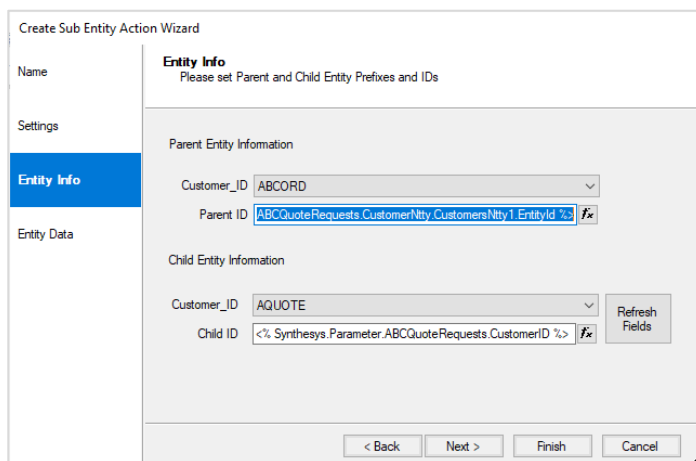
To write information captured in the Quotes Detail section back to the primary *Entity* and history table, use the **Sub Entity Action** in conjunction with web controls and calculations.

- Drop the **Sub Entity Action** after the Quote Details section into your scripted app.
- Enter a logical name into the Name field, i.e., QuoteUpdate.
- In the Settings page, select 'When passed through' and tick Re-evaluate.

Entity Info

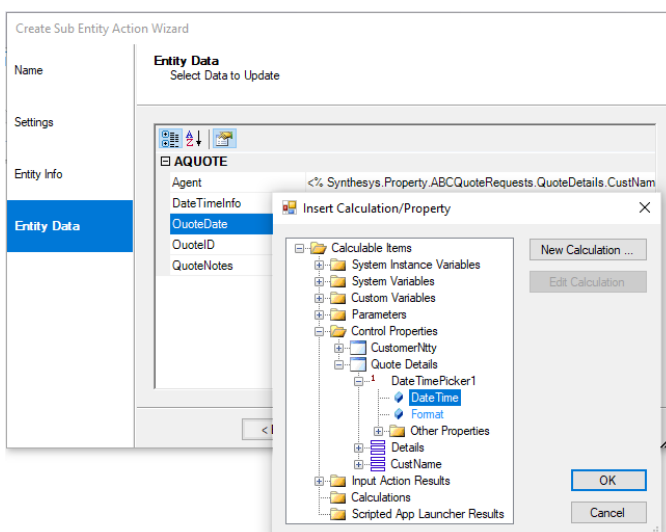
In the **Entity Info** page, configure the parent and child entity information as follows:

- For the **Parent Entity information**, link the *Customer ID* to the primary parent entity ABCORD. Next, use the calculation  icon to browse to the to Control Properties folder, and link the *Parent ID* to the Entity ID of the Ntty Entity control.
- For the **Child Entity information**, link the *Customer ID* to the child entity prefix AQUOTE. Then use the calculation  icon, to link the *Child ID* to the Customer ID Parameter.



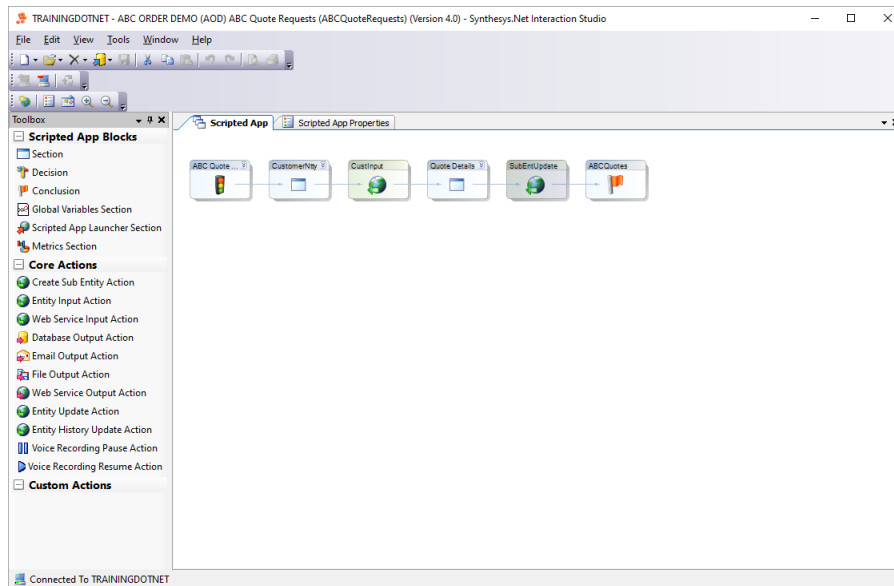
Entity Data

In the **Entity Data** page, fill the data fields displayed, with the Quote information, as captured in the associated web controls of the Quotes Detail section.



Example ABC Quotes Script

The completed Quotes scripted app will include the primary Ntty Entity control, an Entity Input Action, a Quote Details section, and a Sub Entity Action.



Viewing Quote History Events

Having taken a few calls on the Quotes scripted app, capturing relevant details, you can view information of quotes supplied to the customer in the History section of the primary (parent) Entity.

- Select a customer, in our example Tara Game.
- Click the Quote tab in the history section of the Ntty Entity control, to view quote details associated with the selected customer.

