Sub Entity Action







CONTENT

PASSING DETAILS FROM CHILD TO PARENT ENTITY	3
Adding Primary Entity to Quotes Scripted App	3
Entity Input Action	4
Entity Info	4
Web Control Configuration	5
Sub Entity Action	6
Entity Info	6
Entity Data	6
Example ABC Quotes Script	7
Viewing Quote History Events	7



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 **Solution 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 Id Format	Entity Presentation ABCOrder V	
Advanced Properties	Main Entity for This Webflow 🗹	
	< Back Next > Finish 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 Input Action Wiz	zard
Name	Settings Select when the action should occur.
Settings	Webflow Elter Minor assessed through
Entity Info	As soon as possible When passed through Re-Evaluate
	< Back Next > Finish Cancel

Entity Info

In the Entity Info page

- Link the Entity Input Action to the primary (parent ABCORD) Entity Prefix.
- Click the calculation *f* 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.

Entity Input Action W	zard	
Name	Entity Info Please set Entity ID and select Entity Prefix	
Settings		
	Entity Prefix ABCORD	✓ Refresh
Entity Info	Customer_ID	tesNtty f
	🔛 Insert Calculation/Property	×
	Custom Parameters	New Calculation
	CustomerDetails Galaculations CustomerDetails	OK Cancel



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 *f* 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 *f* 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 f_{x} icon, to link the *Child ID* to the Customer ID Parameter.

Settings Parent Entity Information Entity Info Customer_ID ABCORD Parent ID <u>ABCORD Parent ID <u>ABCORD CustomerNity CustomersNity 1 Entity id 755</u> Child Entity Information Customer_ID AQUOTE Customer_ID AQUOTE </u>	Name	Entity Info Please set Parent and Child Entity Prefixes and IDs		
Entity Info Customer_ID ABCORD Parent ID ABCQuote Requests Customer/Ntty/Customers/Ntty1.EntityId %3 7k Child Entity Information Customer_ID AQUOTE Customer_ID AQUOTE Child ID <% Synthesis Parameter ABCQuoteRequests CustomerID %2 7k Refresh Reids	Settings	Parent Entity Information		
Parent ID ABCQuoteRequests CustomerNity Listity 1 Entity 1 2 7 2 7 2 1 2 2 2 2 2 2 2 2 2 2 2 2 2	Entity Info	Customer_ID ABCORD ~		
Customer_ID AQUOTE Refresh Ohild ID 2 Swithesvs Parameter ABCQuote-Requests CustomerID % 1/2	Entity Data	Parent ID ABCQuote Requests CustomerNity CustomersNity1 Entity1d %3		
		Customer_ID AQUOTE Child ID		

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.

tion Wizard		
Entity Data Select Data to Updat	te	
<u>8</u> ∎ ≜↓ 🚰		
Agent	<% Synthesys.Property.ABCQuoteRequi	ests.QuoteDetails.CustNam
DateTimeInfo	🖳 Insert Calculation/Property	×
OuoteDate		
OuoteID		New Calculation
QuoteNotes	System Instance Variables	
	🗄 🦳 System Variables	
	E Custom Variables	
	Parameters	
	Control Properties	
	Quote Details	
	□ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □	
,	🤣 DateTime	
	🧼 Format	
<	😟 🦳 Other Properties	
	Details	
		01
	Input Action Results	OK
	Calculations	Canad
	ttion Wizard Entity Data Select Data to Upda Select Data to Upda Calculate Calculate CoucleD QuoteNotes Calculate CoucleD QuoteNotes Calculate C	Control Properties



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.

