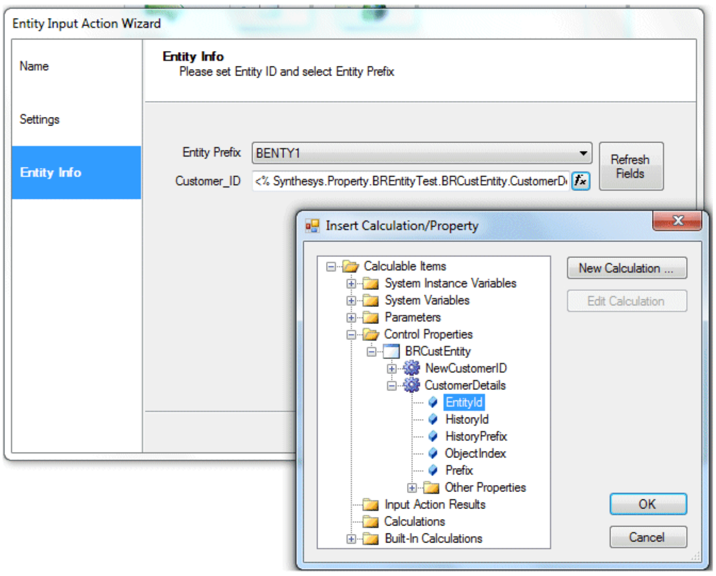
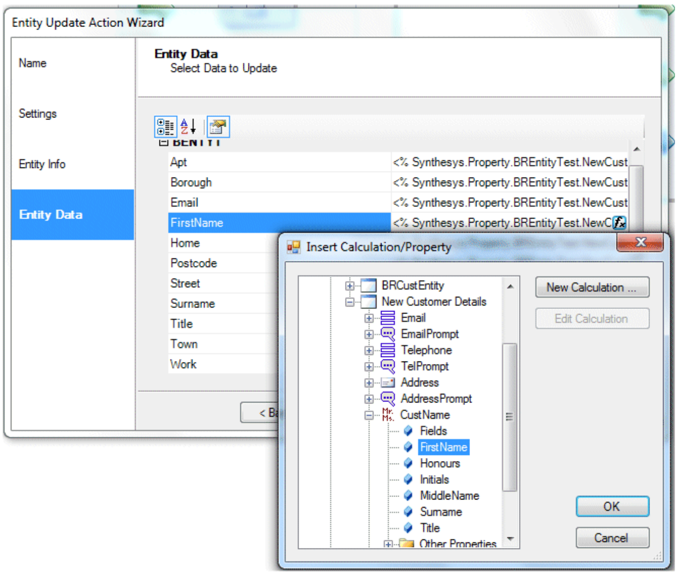
ENTITY INPUT & UPDATE ACTIONS

Entity Input Action



Entity Update Action



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Entity Input and Update Actions

Last updated March 2020

Content

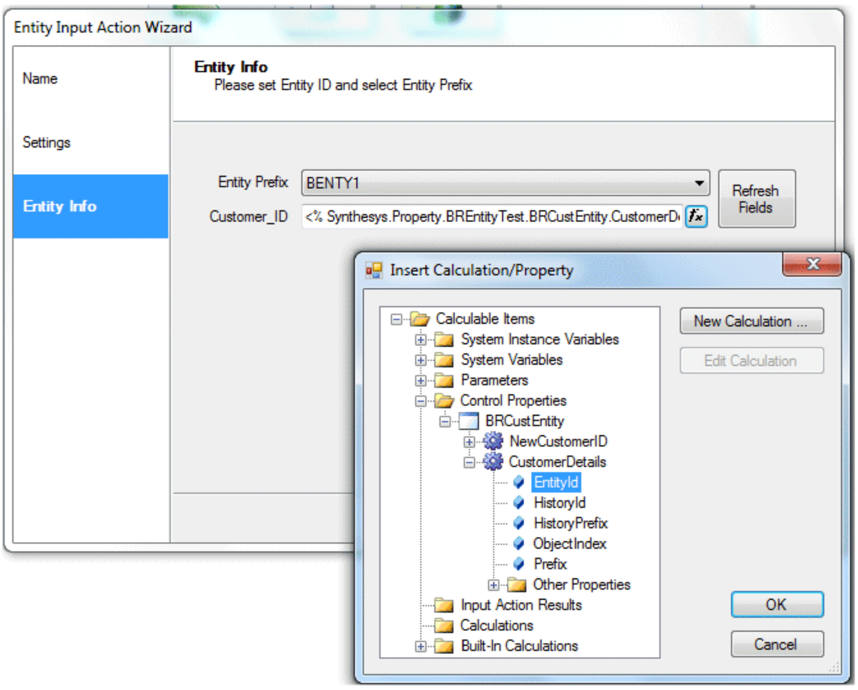
ADDING OR UPDATING ENTITY DETAILS

Using the *Entity Input Action* and *Entity Update Action*, in conjunction with other web controls, users can add new records or update existing CRM Entity data at run time, as required.

Entity Input Action

First, you need to drop an **Entity Input Action** into your scripted app, to allow access to the required Entity data.

- Enter a name for the input action into the **Name** page of the wizard, e.g. Customer Input.
- In the **Settings** page, select the option ‘When passed through’ and tick the Re-evaluate option.
- In the **Entity Info** page, select the Entity Prefix to be used.
- Next, use the icon to fill the Customer_ID field with the CustomerID Parameter (which is created in the Scripted App Properties section, traffic light icon), or if you are using the Ntty control, with the EntityId of your Ntty control.
- Click OK and then the Refresh Fields button.



To access existing entity data, you will use a range of web controls in conjunction with calculations.

Web Controls to add or edit Entity Data

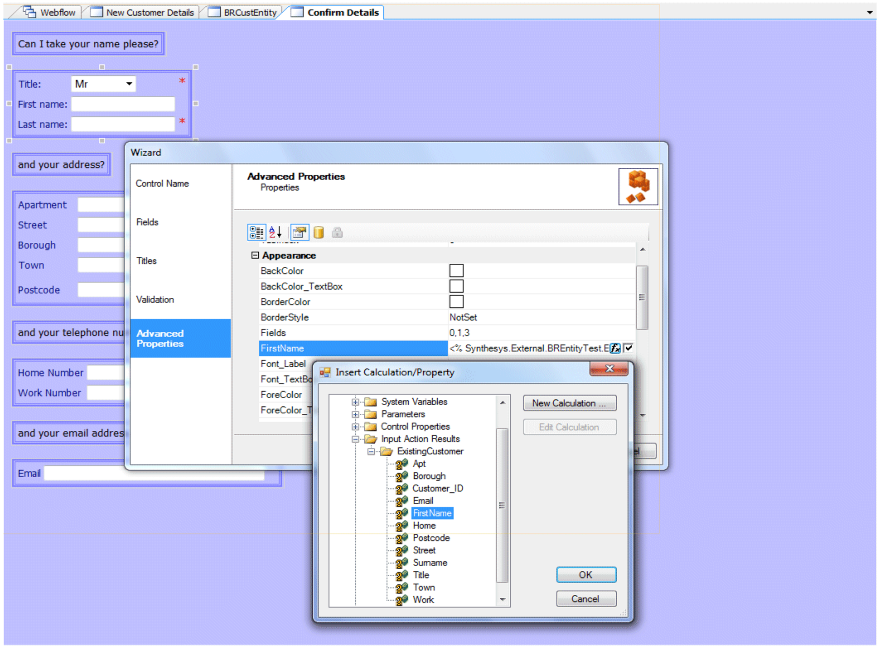
To add new records or to view and update already existing customer entity records, use a range of web controls to capture or view details, and the *Entity Update Action,* to update the entity control.

To add or update new customer records

- Drop a new section, called, for example, *Customer Details*.
- Add the appropriate web controls to capture the relevant details, for example name, address, telephone and email details.

To view and update already existing entity records, you need to use a calculation to pick up existing details for each field, as required, from the **Entity Input Action:**

- Go to the **Advanced Properties** page of the first web control.
- Put your cursor into the field for which you want to display details and click the calculation  icon.
- In the ***Insert Calculation Properties*** dialog, go to the **Input Action Results** folder and pick up the field that contains the relevant entity information.
- Repeat the action, until you have filled all fields that are to be viewed/ updated at run time, then click OK.



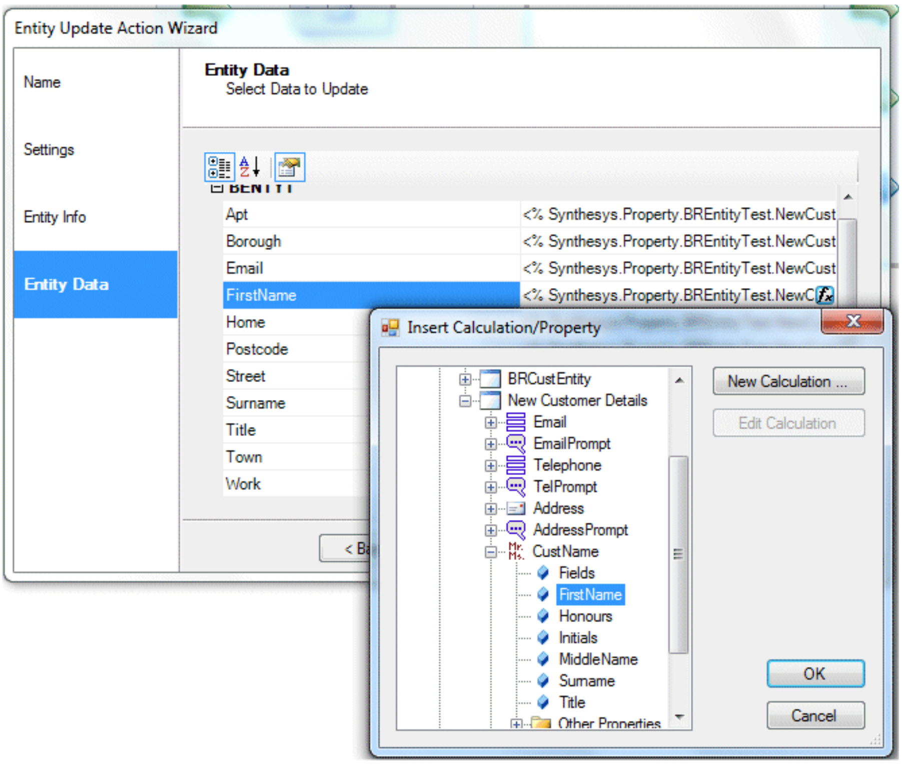
If any existing customer details are changed, you need to update the original customer entity database. For this purpose, use the *Entity Update Action.*

Entity Update Action

The *Entity Update Action enables the update of an* existing entity database, should customer details have been entered or changed at run time.

Drop an **Entity Update Action** Entity Update Action into your scripted app, after the *Customer Details* section containing the web controls.

- Enter a logical name into the **Name** page of the wizard, i.e. *Customer Update*.
- In the **Settings** page, select the option **'***When passed through'* and tick the *Re-evaluate* option**.**
- In the **Entity Info** page, select the ***Entity Prefix*** to be used.
- Next, use the *fx* icon to fill the Customer_ID field with the CustomerID Parameter (which is created in the Scripted App Properties section, traffic light icon), or if you are using the Ntty control, with the EntityId of your Ntty control.
- In the **Entity Data** page of the Entity Update Action wizard, use a calculation to access the fields that may have been updated at run time:
- Put your cursor into the first field and click the calculation *fx* icon.
- In the **Insert Calculation Properties** dialog, select the ***web control*** that contains the associated information and click **OK**.
- Repeat the action, until you have filled all fields, as required, then click OK.



For information about creating an Entity table and configuring the Ntty control, please see the module document Synthesys New Entities.

