



# 10 Things You Didn't Think You Could Do in 10 Minutes with the Toolkit

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# Welcome to 10 *More* Things!

- ✧ Things happen in 3
- ✧ Third year for this session
- ✧ Three Avectrans, three clients, ten times the fun
- ✧ View the presentations from earlier years here:
  - ✧ [AUDC 2008](#)
  - ✧ [AUDC 2009](#)



# 10 Things

1. Dynamic Variable
2. Child Forms in Email Templates
3. Parsed Values in Form Titles
4. Visibility SQL in eWeb
5. Item Link to Launch Query
6. Form Designer – Control Behavior
7. Child Form to Display Extenders
8. Customer Lookup with Add Links
9. Workflow
10. Super Search



# #1 Dynamic Variable

- ✧ Use child\_form\_text parsed value to run a SQL statement
- ✧ Child form:

**Edit - Dynamic Form Child**

Child Form

**description:** Business Unit Detail -> Current Period  
title for grid:

**parent form:** Business Unit Detail  
**destination form:** Business Unit Detail  
parent child form:  
order: 10  
**child key column:** arp\_code (you must select this column in select sql)

`select top 1 arp_code as [ ]  
from ac_ar_period  
join ac_ar_fiscal_year (nolock) on afy_key = arp_afy_key  
where getdate() between arp_start_date and arp_end_date`

**Child Form Action Icons**  
allow add? ☐   
allow edit? ☐   
allow delete? ☐   
allow go to? ☐   
allow export? ☐   
allow preview? ☐   
Note: Child form menus will ONLY work with Designed Forms and ONLY on iWeb.

**Goto Override Form (optional)**  
goto key column:  
goto override form:  
Specify Goto Form and Goto Key Column only when you wish the Goto button to go to a different form than the destination form. Goto Key Column will be used to select the record. **Make sure that you select this column in the SQL select.**

**Preview Override Form (optional)**  
preview key column:  
preview override form:

**Properties**  
is recursive? ☐  
has override links? ☐  
VISIBILITY SQL  
ADVANCED

Sub-Query Builder Validate



# #1 Dynamic Variable

## ✧ Dynamic Parsed Value

### Edit - Dynamic Search

Search Column

**form:** Batch

**table:** ac\_batch

**table column:** bat\_arp\_key [Period]

**control class:** DropDownList

**order:** 300

**alias:**

☐ auto postback?

check auto postback only when other search columns are defined by this search column

**default operator:**

**search field default value:** {child\_form\_text^55d6f00c-fb12-45f1-a6eb-944137896496:\W\*(.+)\W\*~\$1}

**search field description:**  optional override of default description

**DropDownList Configuration - Override**

enter dropdownlist only when you want to override the default dropdownlist definition of this column for this particular search column. This is rarely done.

**value from table:** ac\_ar\_period join ac\_ar\_fiscal\_year on arp\_afy\_key=afy\_key

**value column:** arp\_key

**display value text:** arp\_code

**value where:** arp\_delete\_flag=0 and arp\_afy\_key in (select afy\_key from ac\_ar\_fiscal\_year (nolock) where afy\_atc\_key={bat\_atc\_key})


**value order by:** arp\_add\_date

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# #1 Dynamic Variable

✧ Period field defaults:

 **Find - Batch**

☐ Advanced View

Batch Name:

Company:  ▼

Period:  ▼

Batch Date:

Default Payment Method:  ▼

Close Flag: ☐

Posted?: ☐



## #2 Child Forms in Email Templates

- ✧ Use child\_form\_html in email template to list records
- ✧ Child form:

**Edit - Dynamic Form Child**

Child Form

**description:** Individual -> Invoices - for email template

**title for grid:**

**parent form:** Individual

**destination form:** Invoice - Edit (detail)

**parent child form:**

**order:** 999999

**child key column:** inv\_key (you must select this column in select sql)

**select**

```
inv_key,  
inv_code_cp AS [Invoice Number],  
convert(char(11), inv_trx_date) AS [Invoice Date],  
(select sum(ivd_parity_amount_cp) from ac_invoice_detail (nolock)  
where ivd_inv_key=inv_key and ivd_delete_flag = 0  
and ivd_void_flag = 0 ) AS [Invoice Amount],  
isnull((select sum(pyd_amount) from ac_payment_detail (nolock)  
JOIN ac_invoice_detail (nolock)  
ON pyd_ivd_key=ivd_key  
where ivd_inv_key=inv_key and pyd_delete_flag = 0  
and pyd_void_flag = 0), 0) AS [Payment Amount],  
case  
when inv_close_flag = 1 then ''  
else '</img>'  
end AS [Open?]
```

**from**

```
ac_invoice (nolock)  
JOIN co_customer (nolock)  
ON inv_cst_key=cst_key
```

**where**

```
inv_delete_flag=0  
and inv_cst_key={ind_cst_key} filter list  
and exists (  
select *  
from ac_invoice_detail (nolock)  
where ivd_inv_key = inv_key  
and ivd_void_flag = 0  
and ivd_delete_flag = 0)
```

**order by** inv\_code\_cp

**Child Form Action Icons**

allow add? ☐ +

allow edit? ☐ ✎

allow delete? ☐ ✖

allow go to? ☐ ➡

allow export? ☐ 📄

allow preview? ☐ 🔍

Note: Child form menus will ONLY work with Designed Forms and ONLY on iWeb.

**Goto Override Form (optional)**

goto key column:

goto form:

form and Goto Key Column only when you wish the Goto button to go to a different form than the destination form. Goto Key Column will be used to select the record. Make sure that you select this column in the

**Preview Override Form (optional)**

preview key column:

preview override form:

**Properties**

is recursive? ☐

has override links? ☐

**VISIBILITY SQL**

**ADVANCED**

Sub-Query Builder Validate

# #2 Child Forms in Email Templates



## ✧ Email Template

**Edit - Correspondence Template** 25 of 25

**Message Template**

**list type:** Individual *child form SQL's where caluse filters on {ind\_cst\_key}*

**code:** ListInvoices **do not parse?** ☐ **format:** Html

**title:** List of Invoices by Individual

**subject:** Here Are Your Invoices with Avectra

**field list:**

**html body:**

**B I U** ☐ Show HTML ☐ Borders **Full Screen**

Font  Size  Color

Dear {ind\_full\_name\_cp}, *can include other parsed values, or HTML tags as you would in any correspondence template*

Per your request, here are your invoices with Avectra:

{child\_form\_html^04fa3081-c39b-44ec-886e-b4c407946813} *copy and paste child form's key*

Please review and let us know if you have any questions.

Thanks,  
The Avectra Team

☒ Preserve absolute path for links (for emails in html format)

**text body:**

Dear {ind\_full\_name\_cp},

Per your request, here are your invoices with Avectra:

{child\_form\_text^04fa3081-c39b-44ec-886e-b4c407946813} *for text version, without any HTML tags*

Please review and let us know if you have any questions.

Thanks,  
The Avectra Team





## #2 Child Forms in Email Templates

- ✧ Email includes list of records returned by SQL in child form:

From: nuslu@avectra.com Sent: Tue 3/23/2010 12:52 AM  
To: Nilufer Uslu  
Cc:  
Subject: Here Are Your Invoices with Avectra (Sample Copy)

Dear Mr. John J. Andersen, Jr.,

Per your request, here are your invoices with [Avectra](#):

Invoice Number	Invoice Date	Invoice Amount	Payment Amount	Open?
57689	Mar 16 2010	120.0000	120.0000	
57690	Mar 16 2010	1000.0000	1000.0000	
57691	Mar 22 2010	25.0000	0.0000	✓

Please review and let us know if you have any questions.

Thanks,  
The Avectra Team



# #3 Parsed Values in Form Titles

- ✧ Form Titles can Parse Values from the object

## Edit - Dynamic Form

Form Information

enable ajax? ☒

**object:** Individual

**form description:** Individual

**form title:** {ind\_full\_name\_cp}

**form key:** b772881d-d704-40f3-92b6-09b13a50fcc9

**Properties**

designed form? ☒

has child forms? ☒

has extension controls? ☒

has profile form? ☒

primary profile? ☒

**Properties To Suppress**

no record info footer? ☐

no delete button? ☐

no hide/disable checkbox? ☐

no save button? ☐

display only? ☐

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# #3 Parsed Values in Form Titles

✧ Can do conditional parsing logic also

## Edit - Dynamic Form

Form Information enable ajax? ☐

**object:** Refund

**form description:** ACS Refund (Substitute)

**form title:** @{"?request:keep==true?ACS Keep Credits?Refund"}

**form key:** ee04af13-8ab7-4ce4-800a-8b8cde6ba9d8

Properties	Properties To Suppress
designed form? <input checked="" type="checkbox"/>	no record info footer? <input type="checkbox"/>
has child forms? <input type="checkbox"/>	no delete button? <input type="checkbox"/>
has extension controls? <input checked="" type="checkbox"/>	no hide/disable checkbox? <input type="checkbox"/>
has profile form? <input type="checkbox"/>	no save button? <input type="checkbox"/>
primary profile? <input type="checkbox"/>	display only? <input type="checkbox"/>

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## #3 Parsed Values in Form Titles

- ✧ Link passes the 'keep' value indicating to the form which text to display

### Edit - Group Item Link

group key:	Accounting
item key:	Refund
link text:	ACS Keep Credits
link path:	/forms
link file:	DynamicEdit.aspx
link parameters:	?Action=Add&ref_bat_key={DefaultBatch}&keep=true
link description:	Add
open in new window?	<input type="checkbox"/>
link order:	15
dynamic form:	Refund
report:	
wizard:	
exclude from top bar?	<input type="checkbox"/>
list add icon:	<input type="checkbox"/>




## #4 Visibility SQL in eWeb

- ✧ On an eWeb page, display content on a page conditionally based on the who the user is using [Visibility SQL](#).











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### Active Events

Event name	Code	Start date	End date	Registration date
<a href="#">2010 Board Review Express - Dallas</a>	DAL2010	6/9/2010	6/12/2010	3/10/2010 
<a href="#">2010 SAM Diabetes - Las Vegas</a>	SDNV2010	11/6/2010	11/6/2010	3/10/2010 
<a href="#">2010 AAFP Live! Diabetes and Cardiovascular Disease, Indianapolis</a>	LDIN2010	3/20/2010	3/20/2010	3/10/2010 
<a href="#">2010 AAFP Scientific Assembly</a>	ASA2010	9/29/2010	10/2/2010	3/10/2010 
<a href="#">2010 Family Medicine Congressional Conference</a>	FMCC2010	5/11/2010	5/12/2010	3/10/2010 
<a href="#">2010 Board Review Express - Kansas City</a>	KCBE2010	5/5/2010	5/8/2010	3/10/2010 
<a href="#">2010 Skin Problems and Diseases</a>	SKN2010	6/15/2010	6/19/2010	3/10/2010 
<a href="#">2010 Annual Leadership Forum</a>	ALF2010	4/29/2010	5/1/2010	3/10/2010 
<a href="#">2010 AAFP Live! Pain Management, Atlanta</a>	LPGA2010	3/13/2010	3/13/2010	3/10/2010 
<a href="#">2010 Georgia Practice Enhancement Forum</a>	PEGA2010	3/26/2010	3/27/2010	3/10/2010 

You (Shannon x Merritt) are impersonating Richard Roberts MD, FAAFP  
[End Impersonation](#)

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# Visibility SQL in eWeb



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## Member Directory Search Detail

AAFP Membership Record For:

**Richard Guy Roberts**

What AAFP Members see

### Contact Information

Richard Guy Roberts, MD, FFAFP  
1100 Delaplaine Ct  
Madison, WI 53715-1840

Phone: (608)263-3598

Fax: (608)263-5813

[E-mail this member](#)

### Membership Information

**Member Type:** Active

**Chapter:** Wisconsin AFP

**AAFP Enroll Date:** 1983-07-01

**Reelection Cycle:**

**AAFP Fellow:** 1984

**Year of Birth:** 1953

**Gender:** Male

**Medical School:** The George Washington University School of Medicine

**Med School Graduation Date:** 1980-05-31

**Residency Program:** Sm-ucla Mc Fpr(defunct) Now: 0

**Residency Completion:** 1983-06-01

### National Commission/Committee Assignments

Committee on Bylaws	Speaker	01/1999 - 12/1999
Board of Directors	Speaker	09/1997 - 09/1999
Executive Committee	Member	09/1999 - 09/2000
Executive Committee	Member	09/1998 - 09/1999
Board of Directors	President Elect	10/1999 - 09/2000
Board of Directors	Vice Speaker	10/1994 - 09/1997

# Visibility SQL in eWeb



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## Member Directory Search Detail

**AAFP Member ID:** 5371616

AAFP Membership Record For:

**Richard Guy Roberts**

### Contact Information

Richard Guy Roberts, MD, FFAFP  
1100 Delaplaine Ct  
Madison, WI 53715-1840

**Phone:** (608)263-3598

**Fax:** (608)263-5813

[E-mail this member](#)

### Membership Information

**Member Type:** Active

**Chapter:** Wisconsin AFP

**AAFP Enroll Date:** 1983-07-01

**Reelection Cycle:**

**AAFP Fellow:** 1984

**Year of Birth:** 1953

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**Residency Completion:** 1983-06-01

### National Commission/Committee Assignments

Committee on Bylaws	Speaker	01/1999 - 12/1999
Board of Directors	Speaker	09/1997 - 09/1999
Executive Committee	Member	09/1999 - 09/2000

**What AAFP Staff and  
Chapter Staff see**

# Visibility SQL in eWeb



**Edit - Web Site**

manage web site: aafpv preview site view available styles EDIT

add basic page add advanced page add link add default pane find page deploy content

GLOBAL

About Us | News & Journals | Members | CME Center | C...

**MY ACADEMY**

Welcome  
Access AFP & FPM  
View My CME Record  
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Register for AAFP Event  
Build My Web Site  
AAFP CareerLink

LOCAL Return to Previous Page

**Member Directory Search Deta**

LOCAL

**AAFP Member ID: 5371616**

LOCAL **AAFP Membership Record For:**

**Richard Guy Roberts**

Contact Information	Membership Informat
Richard Guy Roberts, MD, FAAFP	Member Type: Active
1400 Deloncha St	Chapman, Wisconsin, AF

record information save mode: Update insert after save keep values

created: av\_VKulkarni-5/25/2007 1:45:51 PM  
updated: schapel-2/24/2009 3:43:05 PM

web content

**Save** **Cancel**



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# Visibility SQL in eWeb

```
SELECT visible = 'yes'
FROM co_customer
WHERE cst_key IN (
  SELECT cxc_cst_key_1
  FROM co_customer_x_customer (NOLOCK)
  INNER JOIN co_chapter (NOLOCK) ON cxc_cst_key_2 = chp_cst_key
  JOIN co_relationship_type (NOLOCK) ON cxc_rlt_code = rlt_code
  WHERE cxc_cst_key_1 = {Customerkey}
  AND ( cxc_end_date IS NULL
        OR DATEDIFF(dd, GETDATE(), cxc_end_date) >= 0
      )
  AND rlt_chp_area_access_edit_flag = 1 )
OR cst_key IN (
  SELECT cst_key
  FROM co_customer
  INNER JOIN dbo.co_individual ON ind_cst_key = cst_key
  INNER JOIN dbo.co_individual_x_organization ON ixo_ind_cst_key = ind_cst_key
  INNER JOIN dbo.co_organization ON org_cst_key = ixo_org_cst_key
  WHERE org_cst_key = '689dd765-165a-4d23-93ad-6a8ab5451354'
  AND ind_cst_key = {Customerkey} ) |
```

Check to see if  
logged-in user is an  
authorized chapter  
staff person

Check to see if  
logged-in user is an  
AAFP staff person



# #5 Item Link to Launch Query

- ✧ Group Item Link includes the QueryKey

## Edit - Group Item Link

group key:

item key:

link text:

link path:

link file:

link parameters:

link description:

open in new window? ☐

link order:

dynamic form:

report:

wizard:

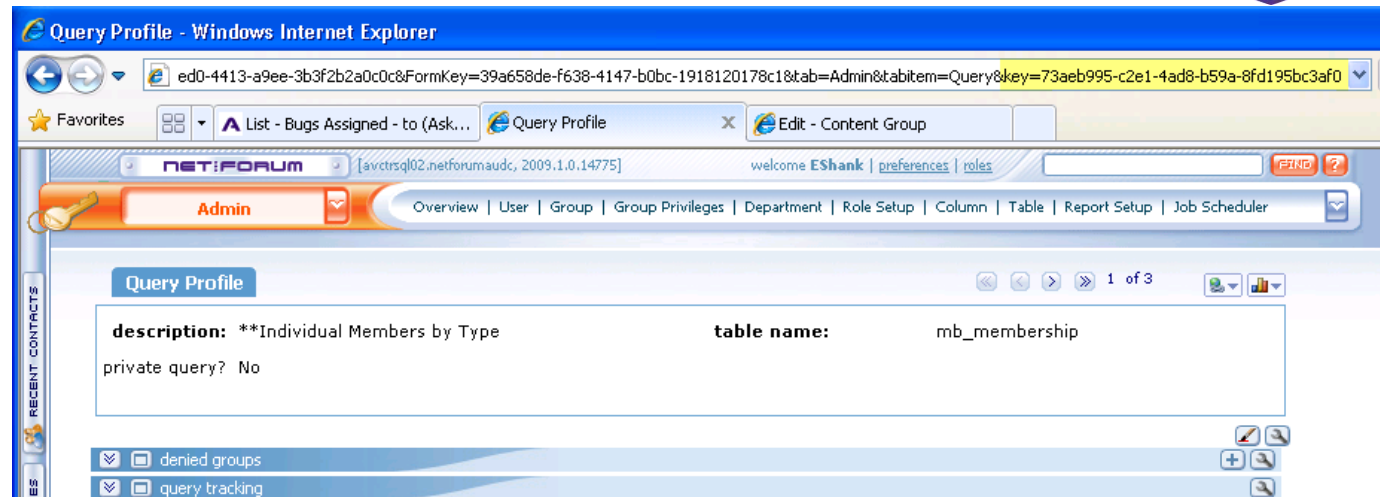
exclude from top bar? ☐

list add icon: ☐

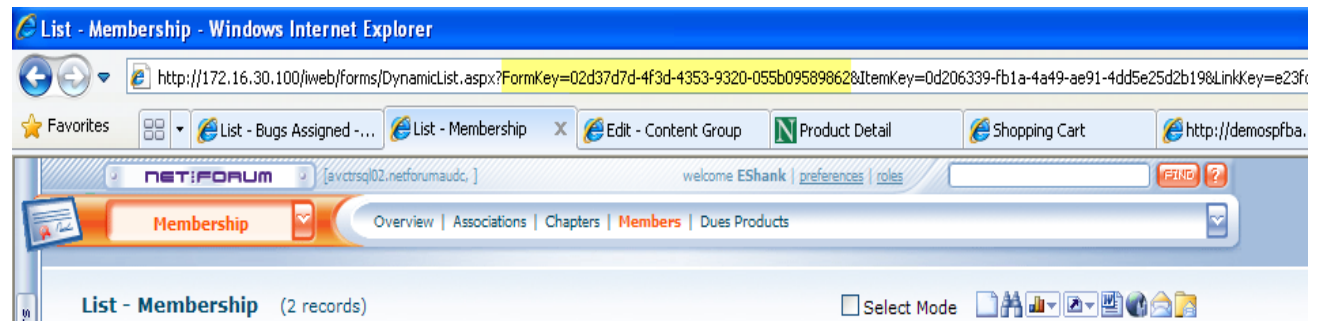


# HyperLink to Launch Query

## ✧ Query Key







## ✧ Form Key





# HyperLink to Launch Query

## ✧ Create the Link

 <b><u>Drop Membership</u></b> Drop memberships	 <b><u>Find Members</u></b> Find members by member type and other criteria	 <b><u>Members By Type</u></b>
<b>SETUP</b>  Set up membership grace periods, member types and statuses, expiration dates, renewal dates, and dues types as well as other membership related items.		

URL/Image Path/Data:

url[DynamicList.aspx?FormKey=02d37d7d-4f3d-4353-9320-055b09589862&QueryKey=73aeb995-c2e1-4ad8-b59a-8fd195bc3af0]



# Form Link to Launch Query

## ✧ Form Link

### Edit - Form Link

aspx file:

order:

source form key:

destination form key:

on edit only? ☐

link text:

external url:

open in new window? ☐

internal path:

internal aspx:



## #6 Form Designer – Control Behavior

- ✧ Toolkit Form Designer enables you to put apply **invisible**, **read-only**, or **required** conditions on a control based on any data in netFORUM related to the record being processed.

Kristin Lavransdatter

- license number is Required ←

A screenshot of a web form titled 'Demographics' for a user named Kristin Lavransdatter. The form contains several input fields: 'full name' (pre-filled with Kristin Lavransdatter), 'nick/badge name' (empty), 'gender' (dropdown menu), 'date of birth' (calendar icon), 'ssn' (pre-filled with 888-66-5555), and 'license number' (empty). A 'deceased?' checkbox is also present. Red arrows point from text annotations to specific fields: 'SSN is read-only' points to the ssn field, 'Grad date is invisible' points to the date of birth field, and 'License number is required' points to the license number field. The 'license number is Required' annotation is also listed in the legend above the form.



# Form Designer – Control Behavior

- ✧ Design the Form, select the control, check the **checkbox** and write the SQL in the **URL/Image Path/Data** textarea.

A screenshot of the 'Properties' window in a form designer, specifically the 'Advanced' tab. The 'Control Class' is set to 'TextBox' and the 'Control Style' is 'DataFormTextBox'. The 'Tool Tip' is 'social security number:'. There are three rows of properties: 'Read Only?' (checked), 'Required?' (unchecked), and 'Invisible?' (unchecked). Each row has a 'Control' dropdown, an 'Operator' dropdown, and a 'Value' text box. A red arrow points to the 'Read Only?' checkbox. Below these is an 'Auto Postback?' checkbox (unchecked) and a 'Default Value:' text box. At the bottom, the 'URL/Image Path/Data:' label is next to a text area containing the SQL query: 'ReadOnlySQL[ select 'readonly' = 'yes' from ac\_invoice\_detail JOIN ac\_invoice\_detail\_term ON trm\_ivd\_key = ivd\_key WHERE ivd\_cst\_key = {ind\_cst\_key} ]'. A red arrow points to this text area.

- ✧ SQL command must return a recordset. 0 rows means control will *not* be invisible, read-only or required. 1 row or more means the control will be invisible, read-only or required.





# Form Designer – Control Behavior

- ✧ Use this feature sparingly to avoid excessive SQL hits.
- ✧ Optimize SQL. Do it right the first time! No `SELECT *`, use `NOLOCK`, etc.
- ✧ As a convention, we write `SELECT invisible = 'yes'` `FROM...` but it really doesn't matter what you write, as long as you return a recordset.
- ✧ You can use:
  - ✧ InvisibleSQL
  - ✧ ReadOnlySQL
  - ✧ RequiredSQL



# Form Designer – Control Behavior

- ✧ You can stack multiple condition types and refer to other active controls on the form. Example from COE:

Control to Add:   Control ID:

**Properties** **Advanced**

Control Class:

Control Style:

Tool Tip:

Read Only? ☐ Control:  Operator:  Value:

Required? ☒ Control:  Operator:  Value:

Invisible? ☒ Control:  Operator:  Value:

Auto Postback? ☒

Default Value:

URL/Image Path/Data:   
RequiredSQL[select required='yes' where (isnull({inv\_orig\_trans\_type}, '') = 'installment') and isnull({inv\_installment\_milestone\_schedule}, '') = '']"/>



# Form Designer – Control Behavior

- ✧ Error messages *cannot* be tailored to the business rule, so avoid cryptic conditions that users won't understand, especially with Required conditions.
- ✧ Don't use this if you can parse existing values of the same Object. Go to SQL only for related data in other tables.
- ✧ More tips and instructions at [http://wiki.avectra.com/Form\\_Designer#Control\\_Conditions](http://wiki.avectra.com/Form_Designer#Control_Conditions)



# #7 Child Form to Display Extenders

- ✧ If you don't want to mess with a baseline [Profile Form](#), you can be tricky with a child form.
- ✧ Step 1: Create a **stored procedure** to pull the [extender table](#) information in rows
- ✧ Step 2: Add a [child form](#) that output the stored procedure results

Abstract Submission Profile - Windows Internet Explorer

http://10.1.1.10/netforummaaha\_dev/Web/forms/DynamicProfile.aspx?ItemKey=92a84210-07f6-4e99-...

Abstract Submission Profile

abstract title: Pet Selection Counseling  
event title: AAHA/OVMA Toronto 2011  
session title:

**SUBMISSION INFO**

format:	category: Technician
status: 2:Submitted	discipline: Behavior
submit date: 04/07/2009	present date:
start time:	end time:
file path:	
summary: After attending this session attendees will be able to offer pet selection counseling as a service to their clients. Pet selection counseling is the first defense in the prevention of behavior problems. The session will focus on educating clients on choosing a pet, responsible pet ownership, and preparing to have a dog in their lives.	

**PRIMARY CONTACT INFO**

Martin Debbie  
Ms Debbie Martin  
Veterinary Behavior Consultations LLC  
2330 Somerset Dr  
New Orleans, LA 70131

phone: (504)392-3411  
fax:  
e-mail: [debbiemartinvt@yahoo.com](mailto:debbiemartinvt@yahoo.com)  
website:

**Info**

abstract submission reviewer

**aaha submission details**

Question	Answer
Participants will be able to:	Improve client satisfaction Improve employee satisfaction Improve productivity Improve quality Improve health of pet Save time Other (Improve human-animal bond)
Application Outcomes:	Provide pet selection counseling Educate staff members on pet selection counseling improve client retention
Presentation Level:	Level 1 - Basic

# Child Form to Display Extenders

```
select abs_key = abs_key_ext,
[Question] = 'Participants will be able to:',
[Answer] = replace(abs_goal1_ext,',','<br />')
+ case when abs_goal1_ext like '%Other%'
and abs_goal1_other_ext is not null
and abs_goal1_other_ext != ''
then '(' + abs_goal1_other_ext + ')'
else '' end,
```

```
sort_by = 1
from ab_abstract_submission_ext with (nolock)
where abs_key_ext = @abs_key
```

union

```
select abs_key = abs_key_ext,
[Question] = 'Application',
[Answer] = abs_goal2_ext
+ case when abs_goal3
and abs_goal3_ext
then '<br />' + a
else '' end
+ case when abs_goal4
and abs_goal4_ext
then '<br />' + a
else '' end,
```

```
sort_by = 2
from ab_abstract_submission_ext with (nolock)
where abs_key_ext = @abs_key
```

union

- ✧ STEP 1: Stored Procedure:
- ✧ Columns placed in rows with unions
- ✧ Comma delimited fields replaced with line breaks
- ✧ Other descriptions rendered in ideal location

Question	Answer
Participants will be able to:	Improve client satisfaction Improve employee satisfaction Improve productivity Improve quality Improve health of pet Save time Other (Improve human-animal bond)



# Child Form to Display Extenders

✧ STEP 2: Child Form definition in Toolkit that executes the SP:

**Edit - Dynamic Form Child**

**Child Form**

**description:** AAHA Submission Details

**title for grid:** AAHA Submission Details

**parent form:** Abstract Submission

**destination form:** AAHA Abstract Submission Details for Child Form

**parent child form:**

**order:** 30

**child key column:** abs\_key (you must select this column in select sql)

**exec client\_aaha\_ab\_submission\_details\_childform {abs\_key}**

**Sub-Query Builder**

**record information** save  
created: dlonax-12/8/21  
There are no results to display.

**grandchild forms**  
Description  
There are no results to display.

**override links**  
Destination Form  
There are no results to display.

**child form group**  
Group  
There are no results to display.

Done





# Child Form to Display Extenders

✧ Close up of Child Form from user perspective:

Question	Answer
Participants will be able to:	Improve client satisfaction Improve employee satisfaction Improve productivity Improve quality Improve health of pet Save time Other (Improve human-animal bond)
Application Outcomes:	Provide pet selection counseling Educate staff members on pet selection counseling improve client retention
Presentation Level:	Level 1 - Basic
Delivery Method:	Lecture
Length of Presentation:	1 hour
Percent Lecture:	100%
Percent Interactive:	0%
Target Audience:	Veterinary Technicians
Room Setup:	Theater
Audio/Visual Needs:	Additional wireless lavalier microphones
Given this presentation:	Other: Southwest Veterinary Symposium, AAHA, LSU
Submitted this proposal:	Other: Midwest Veterinary Conference, LVMA Winter meeting



# #8 Customer Lookup with Add Links

- ✧ Extend customer lookup functionality – use hyperlinks to add individual and organization records

frequency: -- Select --  
proform: html :: CheckBox  
invoice ter: html :: Free Text (Label)  
first invoice da: html :: Hyper Link  
html :: Image  
html :: Sizable Box (Div)  
html :: Horizontal Rule  
html :: Hidden Input  
Avectra :: UpdateGridControl (Div)  
Avectra :: Designed List - Payment Detail

Control to Add: -- Select -- Refresh Control ID:

check email: credit card/check email address:  
e number: check drivers license number: or  
y number: check social security number:  
pingAddre

Redirect Afi ExtensionCurrencyRea

Properties Advanced

Control Class: HyperLink  
Control Style: DataFormHyperLink  
Tool Tip: Add Individual

Read Only? ☐ Control: Operator: Value:  
Required? ☐ Control: Operator: Value:  
Invisible? ☐ Control: Operator: Value:  
Auto Postback? ☐  
Default Value:

URL/Image Path/Data: url[javascript:void(0)]  
onclick[OpenNewWindow('DynamicEditModal.aspx?Modal=Yes&FormKey=25cad8ad-0921-4b50-92ed-f8d36f1fad7f&Action=Add');]  
img[~/images/add\_16.gif] can use images: .gif, .jpeg, etc.

copy paste form key of Add Individual form





# Customer Lookup with Add Links

- ✧ Lookup returns both types of customers

Centralized Order Entry

Bill To: % lookup on customer → Ship To: →

contact: →

communic: →

source: →

Actions: →

Line Items

item: →

Individual	Ahrens Brian	Silver Spring	MD	Director, Sports
Organization	Allegis Group	Hanover	MD	Choice Hotels In
Organization	American Express	New York	NY	10750 Columbia
Organization	American Tower Corp	Boston	MA	Silver Spring, MD
Individual	Andersen John J.	Mc Lean	VA	Allegis Group

add links to add an individual or an organization

7312 Parkway D  
Hanover, MD 211  
American Express  
200 Vesey Street  
New York, NY 10  
American Tower  
116 Huntington A  
Boston, MA 2116  
Mr. John J. Ande  
7901 Jones Bran  
Mc Lean, VA 221

Complementary Products





PLU: \$0.00 \$0.00 \$0.00 \$0.00







# Customer Lookup with Add Links

✧ Add links  
allow adding  
individual  
and organization

Centralized Order Entry

Bill To:    Ship To:   

contact:    communication preference:   

source:

Actions:

Line Items

item	qty	price

Complementary Products

confirmation: ☒ send by

batch:

po number:

<http://64.211.720.100/?Modal=Yes&FormKey=25cad8ad-0921-4b50-92ed-f8d36f1fad7ff&Action=Add - Ac>


### Add - Individual

Personal Information

prefix:  first name:  middle name:  last name:

designation:  source code:

ssn:  click on icon to search individual type:

organization:   relationship type:

title:

e-mail:  type:

Address Information

Business Information - Set As Primary? ☒

address linking method:

org address:

address type:

address lines:

city/state/zip:

county/district:

country/prov:

phone linking:  country:

fax linking:  country:

type: number: ext:

phone:

fax:

Home Information - Set As

address type:

UNITED STATES

phone country:

fax country:

type: n

phone:

fax:

Contact Preferences & Web Access Information



## #9 – Workflow

Goal - when individual submits a “Please send me a Certificant Information Bulletin (CIB)” request online via ASK AFP function, workflow should

- a) Email a template that includes a link to CIB to the individual
- b) Close the customer request generated by ASK AFP
- c) Close a user assignment generated by ASK AFP

# Steps



**Request Activity**

**Request Topic:** Send CTP Candidate Information Bulletin

**Request Description:** please send me a CTP

☒ To receive an e-mail copy of your request, please check here

[Continue](#)

EWEB

assignments

Assigned To

Description

Priority

Due Date

Status

⇒ Galina Kozachenko

Ask AFP

Critical

open

⇒ kwilson

Ask AFP

Critical

Open

⇒ Galina Kozachenko

Ask AFP

Critical

open

⇒ biza

Ask AFP

Critical

open

⇒ biza

Ask AFP

Critical

open

⇒ kwilson

Ask AFP

Critical

Open

customer requests

Summary

Date Contacted

Activity

Reason

Priority

Status

⇒ Ask AFP

3/19/2010

Ask AFP

Question about Membership

Medium

Open

⇒ Ask AFP

3/19/2010

Ask AFP

Send CTP Candidate Information Bulletin

Medium

Open

communications

Date

Activity

Description

Method

3/19/2010

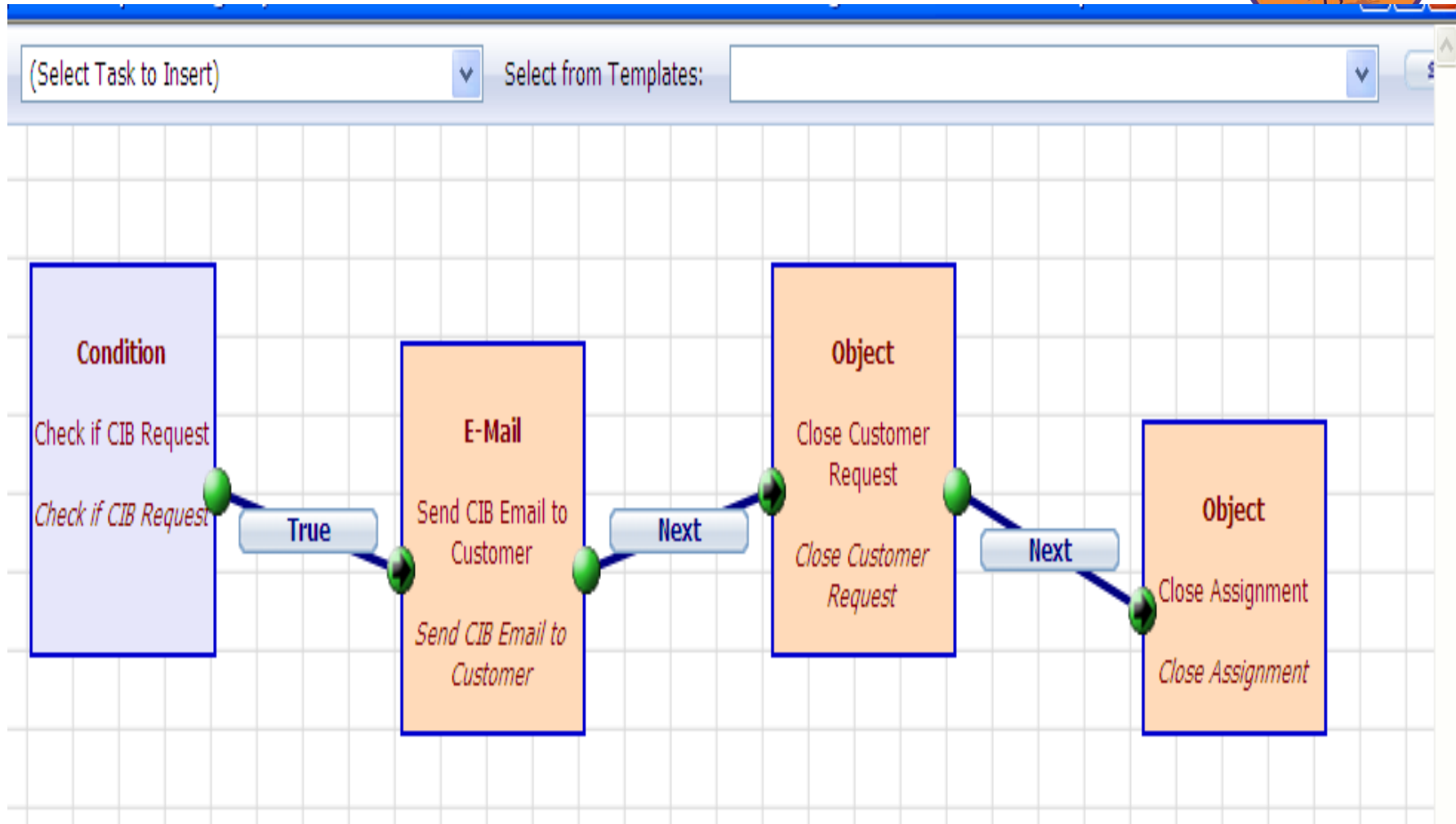
Correspondence Sent

CIB request manual email

E-mail

outbound errors

# Design Workflow





# Workflow Set up

active? ☒

rule name: CIB Requests

object: Contact Request

data object: Contact Request

data object control: cor :: Reason (cor\_crr\_code)

value to trigger rule:

trigger on new value? ☐

trigger on old value? ☐


trigger on insert? ☒

trigger on update? ☐

trigger on delete? ☐

order: 1

order: 1













  
[Workflow Designer](#)

[Workflow Designer](#)

record information save mode: Update ☐ Metadata Lock ☐ hide/disable record? ☐ insert after save ☐ keep

created: bkurihara-01/28/2010 updated: bkurihara-03/22/2010

Save Delete

tasks				
	Task Name	Task Type	Link Type	Sta
  	Check if CIB Request	Condition	True/False	✓
  	Close Assignment	Object		
  	Close Customer Request	Object	Next	
  	Send CIB Email to Customer	E-Mail	Next	



# Task 1 – check condition

**Workflow Information**

**workflow rule:** CIB Requests

type: Condition

**task name:**

task description:

make available as a template? ☐

start task? ☒

stop work flow? ☐

**PROGRAM CODE WORKFLOW - CONDITION**

object assembly:

object type name:

method to execute:

method parameters:

**SK TO TASK LINK INFORMATION**

line types:



# Task 2 – Send Email

**Workflow Information**

**workflow rule:** CIB Requests ▼ **make available as a template?** ☐

**type:** E-Mail ▼ **start task?** ☐ **stop work flow?** ☐

**task name:** Send CIB Email to Customer **order:** 0

**task description:** Send CIB Email to Customer ▲ ▼

---

**OBJECT WORKFLOW**

**object:** Contact Request ▼

**operation:**  ▼

**selection query:**  ▼

**condition:**  ▲ ▼

---

**EMAIL WORKFLOW**

**correspondence template:** afp\_CTP\_CIB\_Request ▼

**e-mail to:** {cst\_eml\_address\_dn}





# Task 3 – Close customer request

**workflow rule:** CIB Requests make available as a template? ☐

**type:** Object start task? ☐ stop work flow? ☐

**task name:** Close Customer Request order: 0

**task description:** Close Customer Request

## OBJECT WORKFLOW

**object:** Contact Request

**operation:** Update

**selection query:**

**condition:** cor\_key='{cor\_key}'

## EMAIL WORKFLOW

**correspondence template:**

**e-mail to:**



# Task 4 – Close assignment

## Workflow Information

workflow rule:	<input type="text" value="CIB Requests"/>	make available as a template?	<input type="checkbox"/>
type:	<input type="text" value="Object"/>	start task?	<input type="checkbox"/>
task name:	<input type="text" value="Close Assignment"/>	stop work flow?	<input checked="" type="checkbox"/>
task description:	<input type="text" value="Close Assignment"/>	order:	<input type="text" value="0"/>

## OBJECT WORKFLOW

object:	<input type="text" value="Assignment"/>
operation:	<input type="text" value="Update"/>
selection query:	<input type="text"/>
condition:	<input type="text" value="coa_cor_key='{cor_key}'"/>

## EMAIL WORKFLOW

correspondence template:	<input type="text"/>
e-mail to:	<input type="text"/>

# Workflow in Action



notes

assignments

Assigned To	Description	Priority	Due Date	Status
Bizaurralde	Ask AFP	Critical		Closed

customer requests

Summary	Date Contacted	Activity	Reason	Priority	Status
Ask AFP	3/22/2010	Ask AFP	Send CTP Candidate Information Bulletin	Medium	Closed

communications

Date	Activity	Description	Method
There are no results to display.			

outbound errors

bounces




# #10 Super Search

- ✧ The iWeb Super Search enables you to search by customer ID, Invoice number, etc. Type in search code:

- ✧ and view the results:

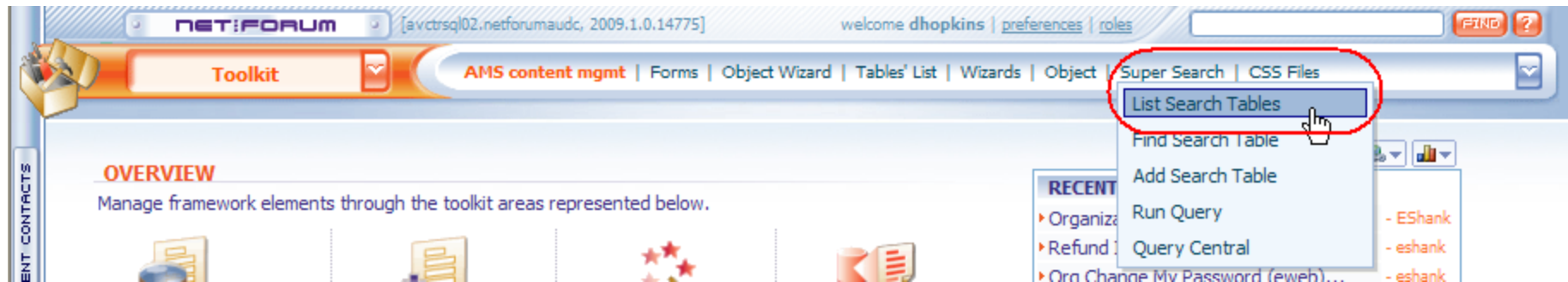
## Search Results

Individual						
Organization						
Committee						
Events Details						
Order Entry/invoice						
	Invoice number	Batch Name	Closed?	billing Sort Name	Salesperson	Transaction Date
	57697	2010-03-16-BATCH-001	1	Lavransdatter Kristin	dhopkins	3/16/2010
Order / Installment Billing						
Batch						
Customer ID Search						
Column						
Dynamic Form						



# Super Search

- ✧ You can add your own search indexes.
- ✧ Add more tables/columns to super search.
- ✧ View list of Search Table in Toolkit:





# Super Search

✧ Standard super search tables:

List - Search Table (13 records)



1	Table Name	Form Description	External (eWeb) Web Site Only?	Order
➤	md_web_content_detail	Web Pages - Search Results	✓	
➤	md_web_posting	Web Posting - Add - (referenced In Code)	✓	
➤	co_individual	Individual		10
➤	co_organization	Organization		20
➤	mb_committee	Committee		30
➤	co_keyword	Keyword	✓	40
➤	ev_event	Events Details		50
➤	ac_invoice	Order Entry/invoice		60
➤	oe_order	Order / Installment Billing		61
➤	ac_batch	Batch		65
➤	co_customer	Customer ID Search		70
➤	md_column	Column		100
➤	md_dynamic_form	Dynamic Form		200



# Super Search

- ✧ Add a new **search column** to *existing* table:

**Edit - Search Table** 3 of 13

table name:

form:

order:

external (eweb) web site of

record information save mode: Update  
created: ali-5/9/2002 5:17:59 P  
updated: ali-5/10/2002 10:12:1

columns

Column Name
<input type="checkbox"/> ind_last_name
<input type="checkbox"/> ind_full_name_cp
<input type="checkbox"/> ind_designation

group security

**Add - Search Column - Windows Internet Explorer**

http://172.16.30.100/iweb/forms/DynamicEditModal.aspx?Action=Add&Modal=Yes&ObjectK

**Add - Search Column**

search table:

column name:

operator:

order:

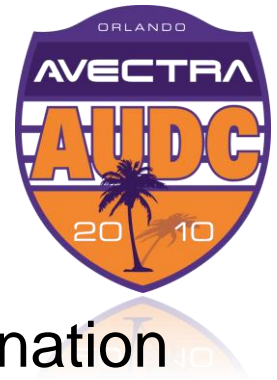
record information save mode: Insert  
dhopkins

Save Cancel

Save Delete Cancel

Order

10
20
30



# Super Search

- ✧ Add a new search table. The form selects the destination page when the user chooses the record:

table name:    
form:    
order:   
external (eweb) web site only? ☐

- ✧ and a new column:

## Edit - Search Column

search table:    
column name:    
operator:    
order:   
  
record information save mode: Update ☐ Metadata Lock ☐ hide/disable record?  
created: dhopkins-3/26/2010 4:06:23 PM





# Super Search

- ✧ Avoid adding too many search fields as it slows performance.
- ✧ Select **indexed** columns for performance.
- ✧ Not as flexible as Query Tool.
- ✧ Cannot conditionally choose destination forms based on “type” of record returned. Example: `co_customer` might be an Individual or Organization but you can have only one destination form.
- ✧ Composes SQL based on [List Tables](#).
- ✧ Works best with unique numbers and codes.
- ✧ See [http://wiki.avectra.com/Super\\_Search](http://wiki.avectra.com/Super_Search) for more.