

Entity Settings

Below is the full list of settings found on any given Entity. This is the expanded view, which is available when toggling the slider in the top right. Below the image are explanations of every setting.



General	Active	<input checked="" type="checkbox"/>
	System name	crmaccount [dfe13c7d8d07e0464aab8ff653ef8330]
	Display name	<input type="text" value="Account"/> (default)
		<input type="text" value="Accounts"/> (list views)
	Description	<input type="text" value="Samlet liste af accounts"/>
	Icon/image	<input type="text" value=' business '/> <input type="button" value="Icon-selector"/> <input type="button" value="edit instructions, header and script"/>
Workflow	Initial status	<input type="text" value="Stranger"/> ▼
	Deleted status	<input type="text" value="Deleted"/> ▼ (hidden)
		<input type="checkbox"/> Recursive delete/hide (parent trigger) <input type="checkbox"/> Satellite data synchronization <input type="button" value="edit"/>
Functionality	Options	<input checked="" type="checkbox"/> Check for Duplicates using unique key(s)
		<input type="checkbox"/> Measure time spent editing / viewing each item
		<input type="checkbox"/> Allow Internationalization <input type="button" value="translate"/>
		<input type="checkbox"/> Offline enabled
Logging	<input checked="" type="checkbox"/> Use Revision log to build log of all changes	
	<input type="checkbox"/> Use Access log to register user access to each item	
	<input checked="" type="checkbox"/> Use Status log to register time in each status	
Targetting	<input checked="" type="checkbox"/> Use Activity monitoring (historical data)	
	<input type="checkbox"/> All users can display logs (Analyst role not required)	
Behaviour	Form options	<input checked="" type="checkbox"/> Display Page selector using <input type="text" value="DEFAULT"/> ▼
		<input checked="" type="checkbox"/> Display Field selector (toggle secondary fields)
		<input type="checkbox"/> Display Template selector on item views
		<input type="checkbox"/> Show List after update (alternative: options)
		Item command <input type="text"/> (default: edit)
List options	<input checked="" type="checkbox"/> Display Create link on list views	

Top buttons

deploy live: Submits all new entity and field changes, so they are rendered in the application.

backup: Access and create new backups

delete: Removes the entity entirely. Record data is not lost from this action.

bulk update: ???

General


Active: Determines whether or not records from the entity is available in the application. It is often useful to deactivate unused entities instead of deleting them, in case you need to look at what once was.

System name: What the entity is called in the database and is sometimes used in configurations where a specific entity needs to be pointed out. An entity's system name never changes.

Display name: What the entity is called from the point of view of the user, and can be changed at any point if needed. Below is what the plural name of the entity should be for the purposes of list views.

Description: Has no function. Is merely a reminder in the designer of what the entity is.

Dev notes: A place for the developer to note things about the entity. Only used for this, is never outputted in the frontend.

Icon/image: Choose an icon to display next to the entity selection in the application navigation menu. The button **Icon-selector** below helps with this. Example:  Accounts

edit instructions, header and script: Advanced menu to insert custom css and JavaScript to adjust the appearance and behaviour of the records.

Workflow

Initial status: The status that all records should start in (before first save).

Deleted status: The status that records should enter, when the delete button is pressed. When set, the delete button will appear in the front end, and the delete method in the API will work. A status has to be marked as "Hidden data" to appear in this list.

Recursive delete/hide (parent trigger): Also delete records in this entity when a record in a parent entity is deleted.

Satellite data synchronization: Enable synchronization of records to another TS application.

Functionality

Check for Duplicates using unique key(s): This feature prevents any record from being created if another records shares its combination of unique field values. Will also prevent one record from being edited to be the same as another. This only works if at least one field is required to be unique.

Measure time spent editing / viewing each item: Logs approximate number of seconds, that a user had a record open, and what status that record was in. Required a re-deploy of the entity.

Allow Internationalization: Enables the internationalization system for this entity. Without this translations will not work.

Offline enabled: Enable offline functionallity for this entity. Eg. allows for creation of record without an active connection to the server, if the entity has been viewed once.

Use Revision log to build log of all changes: Creates a log of all future changes to the records. Includes when and by whom the changes were made.

Use Access log to register user access to each item: Creates a log of when a user opens a record in this entity.

Use Status log to register time in each status: Creates a log of every time a record changed status, including: from-status, to-status, assigned at, assigned-by and waittime.

Use Activity monitoring (historical data): ???

All users can display logs (Analyst role not required): ???

Monitor and analyse waiting time: ???

Behaviour

Display Page selector using: Selects what type of grouping the fields should be shown with.

- DEFAULT: Adds pages as tabs at the top of the record
- Tabs table (old):
- Tabs jquery (new):
- Section headers: Adds pages as collapsable sections
- Column squares:

Display Field selector (toggle secondary fields): ???

Display Template selector on item views: ???

Show List after update (alternative: options): Determines how many submit buttons are displayed at the bottom of the record page. If this is checked, there will be one that just saves changes and exits the page. Otherwise there will be two extra buttons that respectively show the

record in show mode and edit mode after saving.

Item command: Overwrite the "item" (default single record command) command. Default is "edit", other option is "view".

Display Create link on list views: Enable the "Create record" button on list views.

Allow Quicksearch on list views: Enables the resume quick search on lists.

Display link for Archived item search: Enables link to view "hidden" records on lists.

Display Subtable lists on list views (file, task, signature lists): Enable tabular data (not list of children) in list view.

Reverse sorting (newer/lower on top): Set sorting to ascending.

Many command: Overwrite the "many" (alternative multiple records command) command. Default is list, other option is a any multi-record view, eg. calm.

Hide solution in Main menu: Hides record list link from the application navigation menu.

Solution section: Choose which section the entity should belong to in the application navigation menu.

Sort order: Defines sort order in the menu for the section, that this entity is in.

Integration

Codeunit: Advanced feature to add a reference to a TS codeunit to add complex behaviour.

Questionnaire: ???

Generate default OLAP schema: ???

Generate standard permissions for default OLAP schema: ???

??? : is granted full access to default OLAP schema

Allow REST webservice interaction: Must be enabled to access records via rest. A Specific Policy must be enabled for this to work.

Models

Model is active: ???

XLSX file: ???

Reader is active: Enables AI processing of records. This includes bulk uploading and later processing via the service runner.

Security

Use Exclusive group for access control: If this entity has a "lookup: exclusive group" field, only users in that exclusive group can see records from that group. Any users with no exclusive group are not limited this way.

Use Lists of users for each item: ???

Use Lists of groups for each item: ???

Use Creator only restriction (ignore group recommended): Only the user that created the record can access it.

Inheritance: ???

Ignore: Users in this group ignores all advanced access rules.

Share group: Only used when "Use Exclusive group for access control" is enabled. Controls whether records without an exclusive group are accessible by all users, or only users without exclusive group. And controls whether those records are locked or possible to edit.

Default

Language: Choose between established languages for records in this entity.

Style: Overwrite what set of icons this entity should use.

Stylesheet: Overwrite what stylesheet this entity should use.

Template: Overwrite what template should be used to render the record.

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