* Dow Jones working

Solution Name: Dow Jones

Working:

Dow Jones is completed by using 5 flows.   
**Three flows are parent** and **two are child flows, which are being called** and working from all three flows.

Parent flows:

Authentication\_Account\_DowJones

Authentication\_Opportunity\_DowJones

Update\_existingaccounts\_from\_DowJones

Child Flows:

DowJones\_Profiles\_AdverseMedia

DowJones\_Profiles\_Sanctions

Authentication from Dow Jones Involve:

Sending a request to Dow Jones containing **Dow Jones portal username, password, and client-id**, by passing that we receive **auth-N** in case credentials are fine when sending Auth-N we receive **Auth-z** which is known as authorization-bearer token which is basically used to make the query into Dow Jones risk center database.

Detail:

Flow named **Authentication\_Account\_DowJones** is being called when a new account is created OR the existing account name is modified, here we are doing Dow Jones authentication, and then calling 2 child flows, one to query into Dow Jones into **adverse-media lists** and the other flow is being used to query into **Dow Jones sanction lists**.

Flow named **Authentication\_Opportunity\_DowJones** is being called when the existing opportunity is modified, same authentication is being done into this flow but getting an opportunity-related account and sending it into child flows.

Flow named **Update\_existingaccounts\_from\_DowJones** is being called for existing accounts when a person selects the accounts from view and runs the flow manually from ribbon AND opens an specific account and then runs the flow from ribbon, this flow will run, do authentication and pass the required parameters to the child flows.   
  
Both child flows are being call into all 3 parent flows.

Child flow details:

Flow named DowJones\_Profiles\_AdverseMedia is being run from the parent, with the below steps

1. First adding case, cases basically involve **Dow Jones lists** where we are supposed to make queries. Here we are querying into the adverse media list.
2. Association: Here we are adding association where we are supposed to add search-type either precise or more open search, as well we are supposed to search account/opportunity names into dow jones entities, not into persons, and involve other parameters too.
3. Link case with association: here linking so that we could grab the outputs
4. Then getting matches by association and updating the account field adverse media field with dow jones matches w.r.t adverse-media list.

Flow named DowJones\_Profiles\_Sanctions, here doing all stuff above but searching into sanctions lists, and updating account entity field for sanction list.

* Co-Terming

Co terming is consisting of Master and related opportunities.

**Master opportunities fetch**:

<fetch>

<entity name="opportunity">

<attribute name="name" />

<filter>

<condition attribute="new\_mainopportunity" operator="eq" value="1" />

<condition attribute="statecode" operator="eq" value="1" />

<condition attribute="ss\_bcendofcontract" operator="today" />

<condition attribute="ss\_contractstatus" operator="ne" value="3" />

<condition attribute="ss\_autorenewalforsubscriptionterm" operator="eq" value="1" />

</filter>

</entity>

</fetch>

**Related opportunities fetch**:

<fetch>

<entity name="opportunity">

<attribute name="name" />

<attribute name="parentaccountid" />

<filter>

<condition attribute="bbo\_relatedopportunity" operator="eq" value="60d3e1c9-a053-4843-8a76-44259369a007" uiname="test acc 2022 - xml" uitype="opportunity" />

<condition attribute="statecode" operator="eq" value="1" />

<condition attribute="ss\_contractstatus" operator="ne" value="3" />

<condition attribute="ss\_autorenewalforsubscriptionterm" operator="eq" value="1" />

<condition attribute="transactioncurrencyid" operator="eq" value="8f83572e-ddd4-e411-8100-c4346bacbcc0" uiname="EUR" uitype="transactioncurrency" />

</filter>

</entity>

</fetch>

Making new opportunities from the data of master and related opportunities, if 2 masters then 2 new opportunities will be created where we will add master and related opportunities details as well as will create products under new opportunity from master and its related opportunities products. Terminate the master and related opportunities and add the uploaded contracts to the newly created opportunity.