

Lesson 4 Configuring Activities

4.1 Create a shared activity

When a producer's tier is changed, create a shared activity to contact the producer to verify the change.

4.1.1 Requirements

Spec 1 Create an activity pattern with the following settings:

- Subject = Contact Producer
- Category = Reminder
- Code = contact_producer_Ext
- Priority = Normal
- Mandatory = No
- There is no need to provide any activity pattern dates.

Spec 2 When a producer's tier is changed, create a shared activity that uses the contact_producer_Ext activity pattern and includes:

- Subject: Contact <producer_name> re: Change in Tier
- Description: Tier changed from <previous value> to <new value>
- No activity should be created for a new producer.

The project team recommends using a preupdate rule to implement the functionality of this requirement.

4.1.2 Tasks

1. Create a new activity pattern.
2. Create a preupdate rule.
3. Restart the server because a new rule was created.

4.1.3 Testing procedure

1. Create a new producer and verify that a shared activity was not created on the user desktop.
 - a. QuickJump: Run Producer
2. Edit the producer and change the producer's tier.
3. Verify that a shared activity was created on the user desktop and satisfies the requirements.

4.1.4 Solution



Solution

Exact details on how to complete the exercise.

1. Create a new activity pattern.
 - a. Subject = Contact Producer
 - b. Category = Reminder
 - c. Code = contact_producer_Ext
 - d. Priority = Normal
 - e. Mandatory = No
2. Create a preupdate rule.

```
1  USES:
2  uses gw.api.web.admin.ActivityPatternsUtil
3  CONDITION (producer : entity.Producer):
4  return producer.isFieldChanged(Producer#Tier) and not producer.New
5
6
7  ACTION (producer : entity.Producer, actions : gw.rules.Action):
8
9  var activity = new SharedActivity()
10
11  activity.ActivityPattern = ActivityPatternsUtil.getActivityPattern("contact_producer_Ext")
12  activity.Subject = "contact ${producer.DisplayName} re: Change in Tier"
13  activity.Description = "Tier changed from ${producer.getOriginalValue(Producer#Tier)} to ${producer.Tier}"
14
15  END
```

3. Restart the server because a new rule was created.