

iConnect 184406 Design Approach - Create Global Dataitem for CRM Preferences

Project Overview

In this enhancement, a data item has been requested to be created so it can be utilized to interact with the CRM Preferences within the Preferences tab. This will allow users to write rules in order to access this information.

Impacts:

CRM Preferences option in Preferences

Dataitems and rules within Form

Requirements / User Stories

Create Global Dataitem ID for utilizing Preferences

Create a new FLI_ dataitemid that will reference the value set in the CRM Preferences Combo Box. The options listed will be the export values and the data item would be FLI_CRM_PREFERENCES_NAME with the export values of Redtail; Salesforce; Whitepages; NPIS; None.



The screenshot shows a web form titled "CRM Preferences". It contains a "CRM" label followed by a dropdown menu currently set to "Redtail". To the right are two input fields: "User Name" with the text "Instech" and "Password" with masked characters "*****". A "Save" button is located below these fields.

Acceptance Criteria

- Using this new data item, a rule can be created to reference the CRM Preferences in the Preference tab. An example would be a set visibility rule to hide a text box or button.