

Create Determinations

Use determinations to calculate specific field value based on certain conditions. You can either default or propose the value or mandate a certain value using determinations.

Procedure

1. Navigate to your user profile on the top-right corner of your screen, and from the dropdown list select **Settings All Settings General** and click **Extensibility Administration**.




The system opens a new screen and displays a list of all business entities in the left panel. These entities are grouped by services.

2. Select a service and click the **Drill Down** icon (□) to open and select an entity.
3. Navigate to the **Determinations** tab and click the **Create Determination** icon (□). The system launches the determination editor tab.

The editor has three main blocks:

- Header: Specify the determination name, event, and description here.
 - Condition: Set the desired conditions using a flow-based visual condition editor.
 - Assignment: Assign a value to specific fields. You can use each row to assign a single field value. For example, `total_amount = item_count * item_price`.
4. In the header block, perform the following actions:
 - a. Enter a name.
 - b. Choose one of the following events:
 - Pre Hook: You can use it to default or suggest standard and custom field values. The user can change the field values.
 - Post Hook: You can use it to mandate custom field values. The user cannot overwrite the field values.
 - c. Add a description.

5. In the **Condition Block** set the desired conditions using a flow-based visual condition editor.
 - a. Select the standard or extension field from the dropdown.
 - b. Select the comparison operator.
 - c. Select the target comparison. You can compare either by a fixed value or with another field.
 - d. If you choose **Value**, enter a corresponding target value. If you choose **Field**, select a target field.

Add multiple conditions by clicking the **Add Condition** icon (). To remove a condition, click the **Remove Condition** (). To clear all conditions in a block, click the **Delete Condition Block** icon ()

Note that when you create multiple conditions, the condition group is considered fulfilled only if all the conditions within a group are met.



6. Optional: You can also create an OR condition by clicking the **+ Or** button. The system displays additional condition blocks. Follow the same steps as earlier to fill one or more OR condition blocks.

Note

When you create multiple OR conditions, the condition group is considered fulfilled if any one of the block conditions are met.

Under the **Summary** header, the system shows you a summary of all the conditions that you've entered.



7. In the **Assignment Block** perform the following actions:
 - Use a row to assign or calculate value to a specific field.
 - Write the expressions and calculations in free-style format.
 - Mention the target field first, followed by “=” and then specify the expression. For example, {status} = ('Open')
 - Enclose all entity fields in curly braces: For example, {status}, {ID}, and so on.

- Ensure that you add the extension/custom fields under the extensions structure. For example, {extensions/customfield}
- Get the technical name of the fields using the dropdown in the **Condition Block**.
- Use expressions consisting of operators and certain pre-defined functions specified in the **Assignment Block**.
- Ensure that you check the feedback provided by the system in case of invalid expressions. The error messages are configured to give exact feedback so that you can correct the expression.
- Create additional assignment rows by clicking the **Add Assignment** icon (). To remove a row, click the **Remove Assignment** icon (). Click **Clear All** to remove all assignment rows.
- Click **+ Else** to create one more set of condition blocks that are triggered if the initial sets of conditions are not satisfied. Note that you can create an Else block only when you have at least one condition in the initial IF block. Follow the same steps to create Else conditions and assignments inside the Else block.

8. Click **Save and Activate**.

Note

You can create a maximum of five determinations per entity.

In the **Determinations** tab, the system lists all determinations for a specified entity. Click the **Edit** () or **Delete** () icons to edit or delete the corresponding determination.