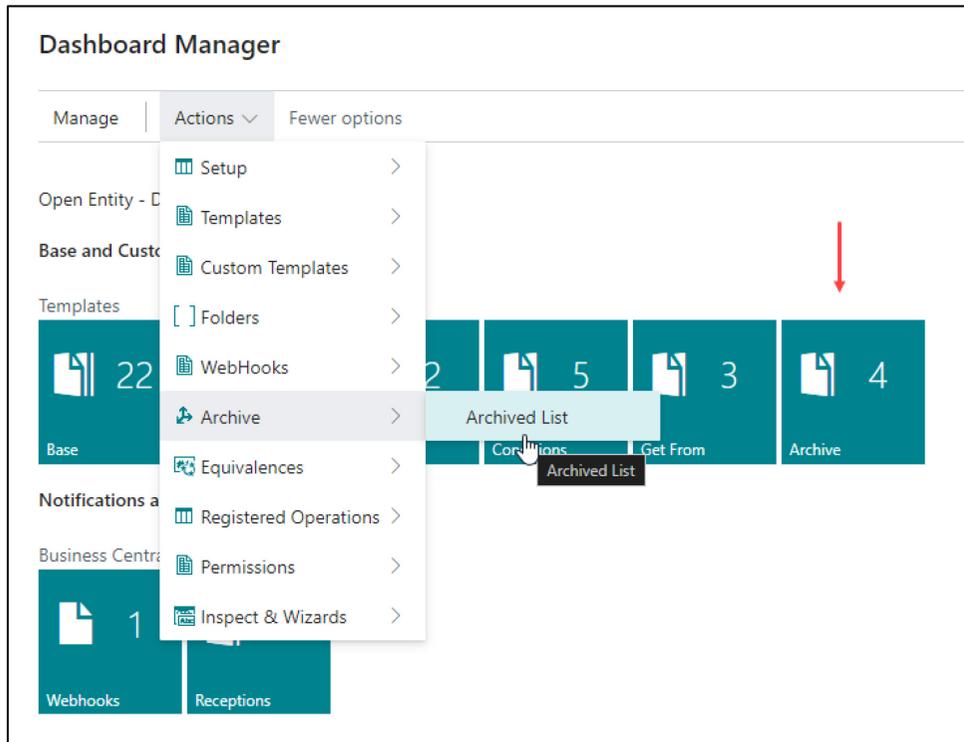


ARCHIVE

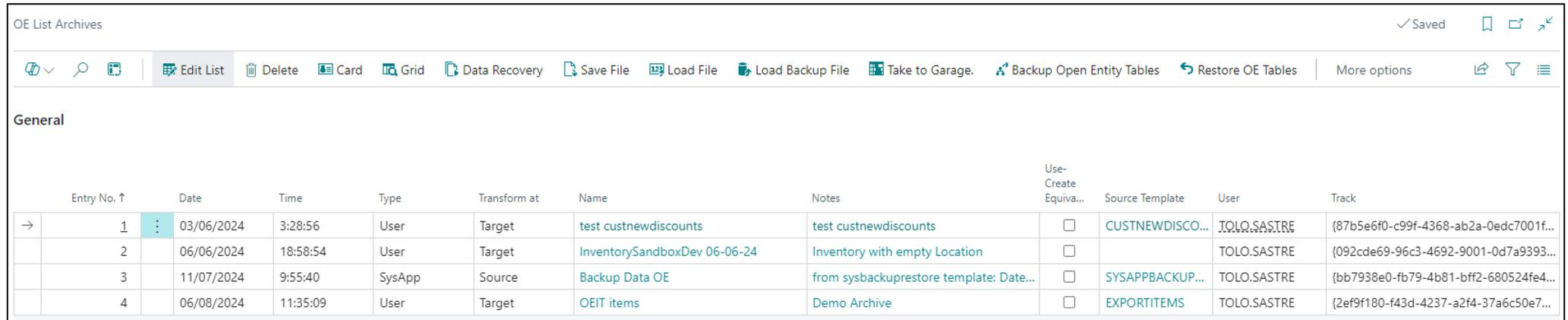
In the **Archive** section, we can store a set of data that we've selected and saved from any Open Entity page that includes the '**Archive**' action. This can be used to create various types of records, such as a history, data from a request made to another company, or a local data backup. Additionally, we can load external data using the '**Load File**' action.

Access to Archive: Go to **Manager Control Panel -> Actions -> Archive -> Archived List** or click on the **Archive** cue.



By selecting any of these actions, a list will display the items we have archived using the various '**Archive**' actions available in the Open Entity application.

In the **Archive** list, you'll see several actions at the top of the page:



The screenshot shows the 'OE List Archives' interface. At the top, there is a toolbar with icons for 'Edit List', 'Delete', 'Card', 'Grid', 'Data Recovery', 'Save File', 'Load File', 'Load Backup File', 'Take to Garage', 'Backup Open Entity Tables', and 'Restore OE Tables'. Below the toolbar is a 'General' section containing a table of archive entries. The table has columns for 'Entry No.', 'Date', 'Time', 'Type', 'Transform at', 'Name', 'Notes', 'Use-Create Equiva...', 'Source Template', 'User', and 'Track'. The first row is selected, and its details are visible in the table below.

Entry No. ↑	Date	Time	Type	Transform at	Name	Notes	Use-Create Equiva...	Source Template	User	Track
→ 1	03/06/2024	3:28:56	User	Target	test custnewdiscounts	test custnewdiscounts	<input type="checkbox"/>	CUSTNEWDISCO...	TOLO.SASTRE	{87b5e6f0-c99f-4368-ab2a-0edc7001f...
2	06/06/2024	18:58:54	User	Target	InventorySandboxDev 06-06-24	Inventory with empty Location	<input type="checkbox"/>		TOLO.SASTRE	{092cde69-96c3-4692-9001-0d7a9393...
3	11/07/2024	9:55:40	SysApp	Source	Backup Data OE	from sysbackuprestore template: Date...	<input type="checkbox"/>	SYSAPPBACKUP...	TOLO.SASTRE	{bb7938e0-fb79-4b81-bff2-680524fe4...
4	06/08/2024	11:35:09	User	Target	OEIT items	Demo Archive	<input type="checkbox"/>	EXPORTITEMS	TOLO.SASTRE	{2ef9f180-f43d-4237-a2f4-37a6c50e7...

Delete: Deletes the selected records or the archive entry where the cursor is positioned.

Edit List: Allows editing of certain fields within the data archive.

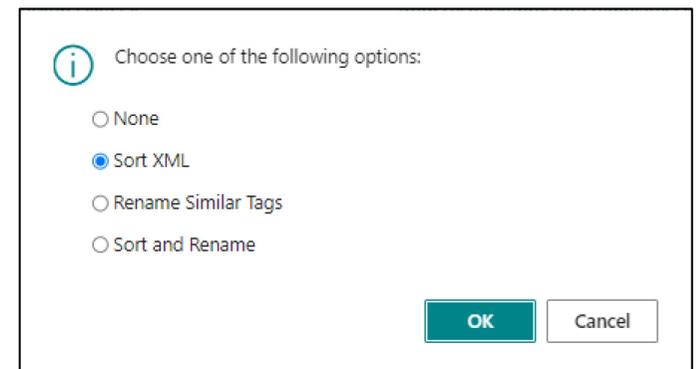
Card or Grid: Displays the archive information in either card (detailed) or grid (list) view.

Data Recovery: Executes the associated template (**Source Template**) on the selected line with the archived information, restoring the data to Business Central tables. When selecting this action, a confirmation message appears with a generic warning that the archived data may be outdated.

Save-File: Saves the archived information as an XML file on your computer.

Load-File: Loads and archives the information from an XML or JSON file on your computer. Only XML or JSON files should be loaded (if the file is JSON, it will be transformed into XML data). After dragging your file into the **Open File** window that appears, you'll see a menu of options upon completion:

- **None:** Loads the file without modifications.
- **Sort XML:** Organizes the XML data.
- **Rename Similar Tags:** Renames tags with similar names to avoid conflicts.
- **Sort and Rename:** Applies both sorting and renaming to the XML data.



Choose one of the following options:

- None
- Sort XML
- Rename Similar Tags
- Sort and Rename

OK Cancel

Select the option best suited for the template that is expected to import the data (**Data Recovery**). Once the action is complete, you'll see an asterisk (*) in the **'Name,'** **'Notes,'** and **'Source Template'** columns, indicating that these values can be updated if needed.

OE List Archives

✕ The file has been uploaded!

General

Entry No. ↑	Date	Time	Type	Transform at	Name	Notes	Use-Create Equiva...	Source Template	User	Track
1	03/06/2024	3:28:56	User	Target	test custnewdiscounts	test custnewdiscounts	<input type="checkbox"/>	CUSTNEWDISCO...	TOLO.SASTRE	{87b5e6f0-c99f-4368-ab2a-0edc7001f...
2	06/06/2024	18:58:54	User	Target	InventorySandboxDev 06-06-24	Inventory with empty Location	<input type="checkbox"/>		TOLO.SASTRE	{092cde69-96c3-4692-9001-0d7a9393...
3	11/07/2024	9:55:40	SysApp	Source	Backup Data OE	from sysbackuprestore template: Date ...	<input type="checkbox"/>	SYSAPPBACKUPR...	TOLO.SASTRE	{bb7938e0-fb79-4b81-bff2-680524fe4...
4	06/08/2024	11:35:09	User	Target	OEIT items	Demo Archive	<input type="checkbox"/>	EXPORTITEMS	TOLO.SASTRE	{2ef9f180-f43d-4237-a2f4-37a6c50e7d...
→	5	:	18/08/2024	2:03:09	User	Target	*	*	TOLO.SASTRE	{33094e78-f990-426c-a9ae-986169b8...

'Load Backup File': loads a backup file that was previously created and downloaded to our local computer.

'Take to Garage': sends the file to the garage for testing. It is important to have the fields 'Transform at' and 'Template Source' filled in (editable fields), as these fields are essential to "start" the engine.

'Backup Open Entity Tables': generates a backup of all tables used by the Open Entity application and archives it. This action uses the system template 'SYSAPPBACKUPRESTORE'.

If we want to disable or enable any Open Entity table (for example, transaction log data, imports, and exports) we can edit it from the 'Setup' page, navigate to the templates from the 'App System' section, and edit the mentioned template.

By default, the template does not enable the Entity tables (records of the 'Inbound-Outbound Folders) nor the 'Operation Log' to economize on data size, but they can be activated if needed.

OE Setup

[Get System App Templates](#)
[Get Demo Templates](#)
[Upload Template file](#)
[More options](#)

Business Central Resources

Export Resource importEntities Template Resource readTemplates
 Log Resource importLogs

External Apps Resources

Unique Entry Point entryEntities OE Resources OE

Company Data >

App System

System Template Log ... · SYSAPLOGOPE ... System Backup-Resto... · SYSAPPBACKUPRESTORE ...
 System Export Templa... · SYSAPPEXPORTTEMPLATE ...

OE Template Base

SYSAPPBACKUPRESTORE

[Copy-Paste](#)
[Export Data](#)
[Excel](#)
[Run Process](#)
[Save File](#)
[Archive](#)
[Copy Template](#)

Operation Insert-Modify

Table Trigger

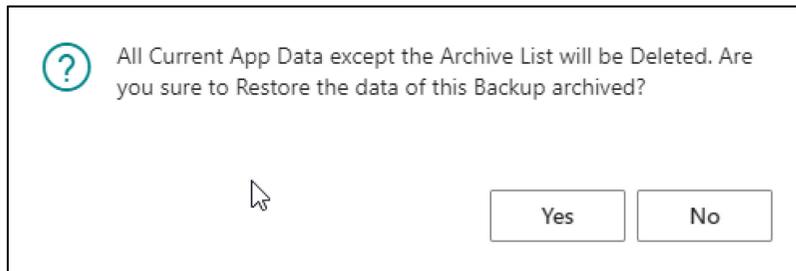
[New Line](#)
[Delete Line](#)
[Use Key](#)
[Clear Key](#)
[Excel Header](#)
[Excel Line](#)
[Indent](#)

Target Table ID	Target Table Name	Related Table ID	Tag	Operation	Table Trig...	Key	Fields	Formu...	Filters	Fusion	Excel	Ena...	Force
72139577	NOW Field Relation	0		Insert-Mod...	<input type="checkbox"/>		11	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
72139578	NOW Field Lines	0		Insert-Mod...	<input type="checkbox"/>		32	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
72139580	NOW Template Permissions	0		Insert-Mod...	<input type="checkbox"/>		6	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
72139582	NOW Entity	0		Insert-Mod...	<input type="checkbox"/>		35	No	0	No	0	<input type="checkbox"/>	<input type="checkbox"/>
72139583	NOW OE Setup	0		Insert-Mod...	<input type="checkbox"/>		20	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
72139584	NOW Tenants	0		Insert-Mod...	<input type="checkbox"/>		13	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
72139585	NOW Company By Tenant	0		Insert-Mod...	<input type="checkbox"/>		4	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
72139586	NOW Template by Company	0		Insert-Mod...	<input type="checkbox"/>		4	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
→ 72139587	⋮ NOW Log Operations	0		Insert-Mod...	<input type="checkbox"/>		8	No	0	No	0	<input type="checkbox"/>	<input type="checkbox"/>
72139588	NOW Filter Lines	0		Insert-Mod...	<input type="checkbox"/>		20	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>
72139589	NOW Excel Fields	0		Insert-Mod...	<input type="checkbox"/>		15	No	0	No	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The 'Backup OE Tables' action will ask for confirmation before being executed. Once completed, it will have created a new file entry like the following:

Entry No. ↑	Date	Time	Type	Transform at	Name	Notes	Use-Create Equiva...	Source Template	User	Track
1	03/06/2024	3:28:56	User	Target	test custnewdiscounts	test custnewdiscounts	<input type="checkbox"/>	CUSTNEWDISCO...	TOLO,SASTRE	{87b5e6f0-c99f-4368-ab2a-0edc7001f...
2	06/06/2024	18:58:54	User	Target	InventorySandboxDev 06-06-24	Inventory with empty Location	<input type="checkbox"/>		TOLO,SASTRE	{092cde69-96c3-4692-9001-0d7a9393...
4	06/08/2024	11:35:09	User	Target	OEIT items	Demo Archive	<input type="checkbox"/>	EXPORTITEMS	TOLO,SASTRE	{2ef9f180-f43d-4237-a2f4-37a6c50e7d...
5	18/08/2024	2:03:09	User	Target	*	*	<input type="checkbox"/>	*	TOLO,SASTRE	{33094e78-f990-426c-a9ae-986169b8...
→ 6	18/08/2024	2:22:27	SysApp	Source	Backup Data OE	from sysbackuprestore template: Date ...	<input type="checkbox"/>	SYSAPPBACKUPR...	TOLO,SASTRE	{858fe87f-bfa1-49e3-bf7c-6c6c6731f1...

'Restore OE Tables': will ask for confirmation to restore the data contained in the archived backup entry and will recover the data after deleting all tables except those in the file. This exception is useful to avoid losing the backup we are currently restoring, which we will likely want to keep.



This action will not leave a record in the application's inboxes and outboxes but will appear in the Operation Log.

The columns in the file list are self-explanatory, and their meanings have been mentioned in previous documents.

EQUIVALENCES

In the 'Open Entity' application, an equivalence implies the association or linkage of a source entity with one or more destination entities, so that when the recipient executes an action deployed from a source, the actions are applied to its equivalent entities.

We access equivalences by navigating from the Control Panel Actions -> Equivalences -> Equivalences List or directly from the 'Equivalences' cue.

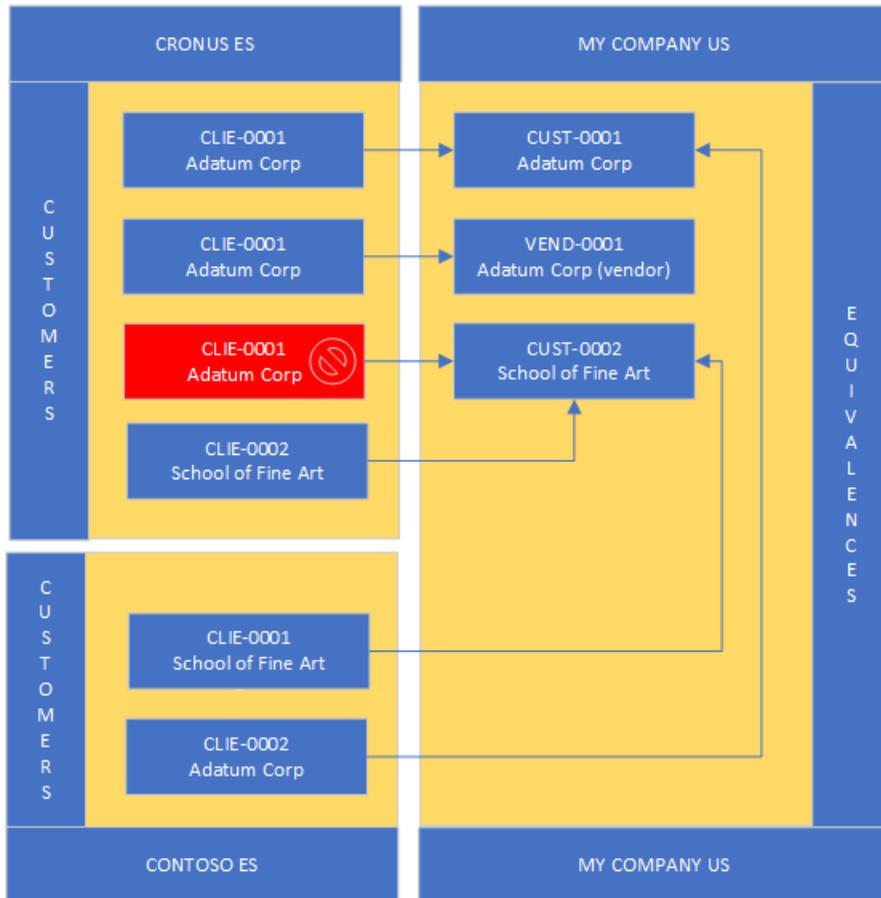
Dashboard Manager

The screenshot shows the Dashboard Manager interface. On the left, a 'Manage' menu is open, showing 'Actions' with a dropdown arrow. The 'Actions' dropdown menu is expanded, listing various options: Setup, Templates, Custom Templates, Folders, WebHooks, Archive, Equivalences, Registered Operations, Permissions, and Inspect & Wizards. The 'Equivalences' option is highlighted, and a sub-menu 'Equivalences List' is visible. A red arrow points to the 'Equivalences' tile in the 'Customizations' section on the right. The 'Equivalences List' tile is also visible in the 'Customizations' section, showing a count of 8. The 'Activity' section shows three tiles: Inbounds (13), Outbounds (13), and Logs (233).

Section	Item	Count
Customizations	Clipboard Pages	49
	Custom Templates	13
	Template Groups	2
	Equivalences	8
Activity	Inbounds	13
	Outbounds	13
	Logs	233

The page will display a list where equivalences between a source record and the current destination record can be located (lists are always created in the destination). For example, if we export a customer from the company CRONUS ES to the company CRONUS USA with the 'Transform at' field set to 'Target or Both', and in our destination template, we have replaced the numbering with our own (No. Series field config.), and equivalences were requested from the source (the 'Use-Create Equivalence' field marked), in addition to creating the new customer with the new numbering, an entry will be made in the equivalence list that can be referenced in future operations.

NOTE: ONLY THE ROOT OR PRIMARY ENTITY WILL BE SUBJECT TO AN EQUIVALENCE. This means that if we export an entity composed of multiple tables, such as Customers along with their Sales Prices and Discounts, the equivalence will be created for the Customers, but no equivalences will be independently created for prices or discounts.



Equivalences between source and destination should always have a 1-to-1 relationship for a group in the source consisting of Tenant + Environment + Company + Entity Type or Table.

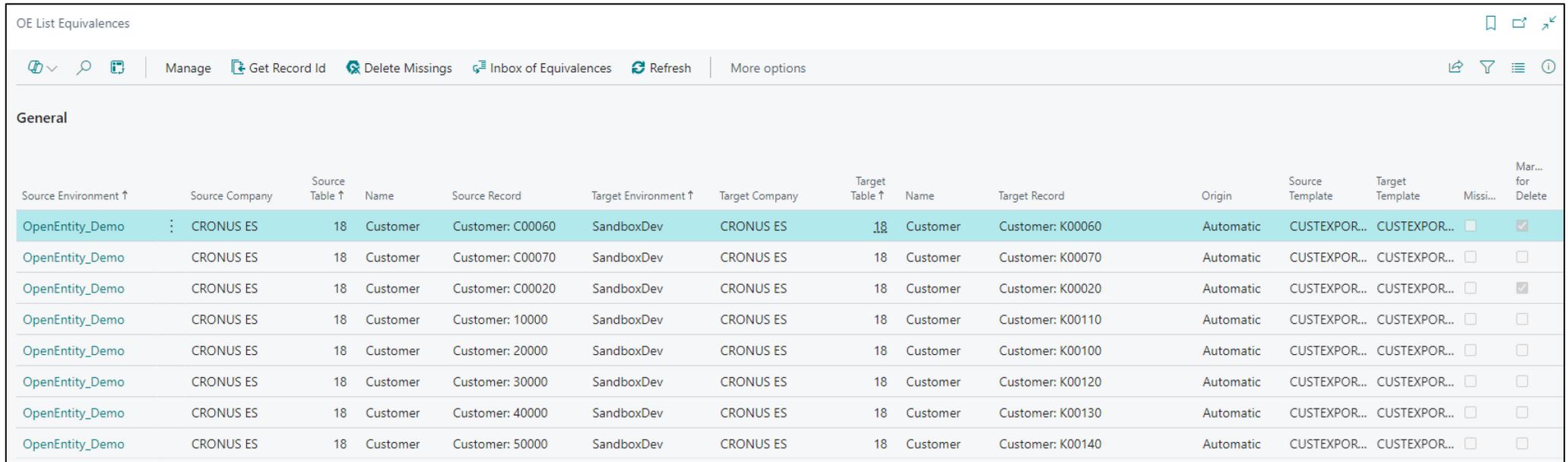
It is possible for two different entries in the source to point to the same destination if one of the elements in the group mentioned above is different.

The diagram on the left shows some relationships that can be created. The box in red indicates an error, and the equivalence will not be created because the customer with code CLIE-0001 had already been assigned to Customer CUST-0001 in the company 'My Company US'.

There are two ways to create a link: automatically from the source and manually from the destination.

To create an equivalence automatically, we must activate the 'Use-Create Equivalence' field in the general section of the base or custom template. Additionally, the 'Transform at' field in the base or custom template must delegate control to a Destination base template (values 'Target' or 'Both').

When exporting the customer with the 'Use-Create Equivalence' option, the destination inbox will reflect it in the corresponding column, and we will obtain a new entry in the Equivalences List:



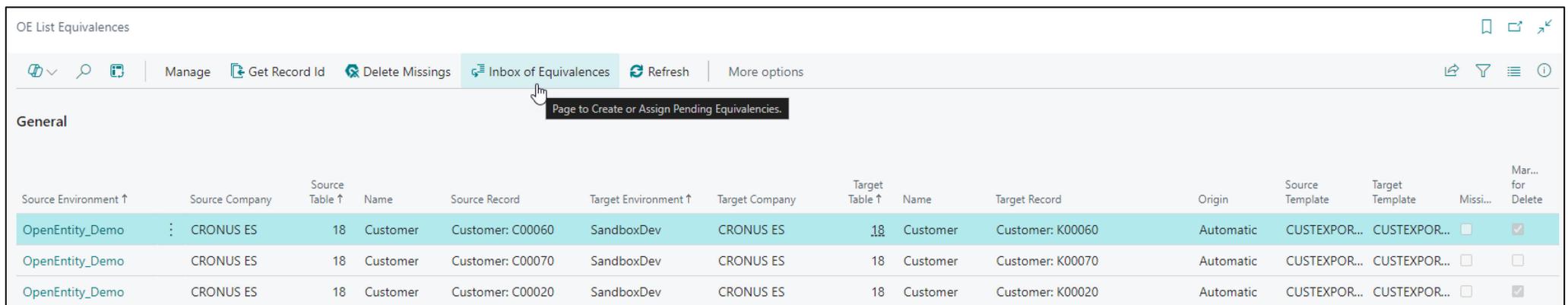
The screenshot shows the 'OE List Equivalences' interface. At the top, there is a toolbar with icons for search, refresh, and other actions. Below the toolbar, there is a 'General' section containing a table with the following columns: Source Environment, Source Company, Source Table, Name, Source Record, Target Environment, Target Company, Target Table, Name, Target Record, Origin, Source Template, Target Template, Missi..., and Mar... for Delete. The table contains eight rows of data, each representing a source record and its corresponding target record. The first row is highlighted in light blue.

Source Environment ↑	Source Company	Source Table ↑	Name	Source Record	Target Environment ↑	Target Company	Target Table ↑	Name	Target Record	Origin	Source Template	Target Template	Missi...	Mar... for Delete
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00060	SandboxDev	CRONUS ES	18	Customer	Customer: K00060	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00070	SandboxDev	CRONUS ES	18	Customer	Customer: K00070	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00020	SandboxDev	CRONUS ES	18	Customer	Customer: K00020	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 10000	SandboxDev	CRONUS ES	18	Customer	Customer: K00110	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 20000	SandboxDev	CRONUS ES	18	Customer	Customer: K00100	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 30000	SandboxDev	CRONUS ES	18	Customer	Customer: K00120	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 40000	SandboxDev	CRONUS ES	18	Customer	Customer: K00130	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 50000	SandboxDev	CRONUS ES	18	Customer	Customer: K00140	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>

The equivalence between source and destination will always be remembered if the source template or any custom template has the previously mentioned field activated.

MANUAL

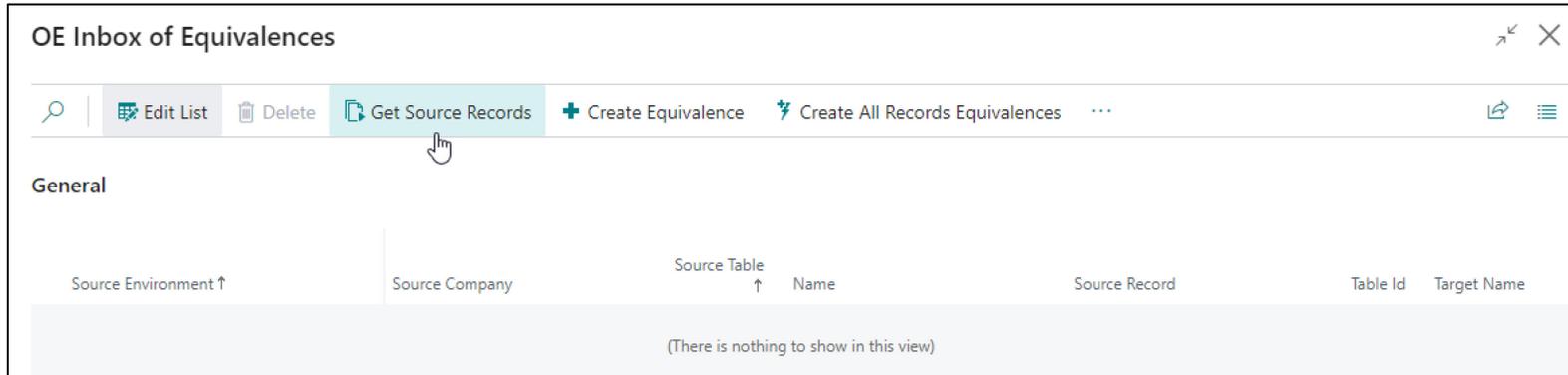
To create a link or equivalence between a source entity and a destination manually, we will use the action **Inbox of Equivalences**.



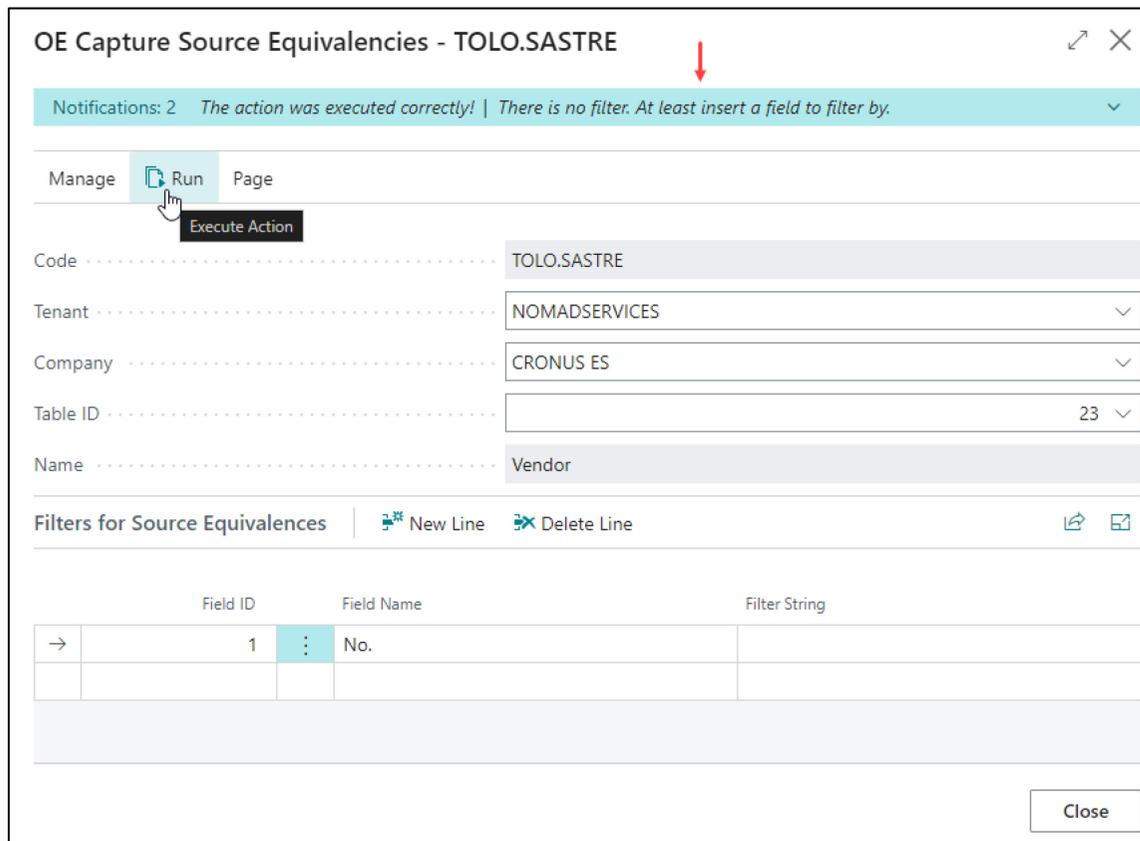
The screenshot shows the 'OE List Equivalences' interface, similar to the previous one, but with the 'Inbox of Equivalences' button in the toolbar highlighted. A tooltip is visible over the button, reading 'Page to Create or Assign Pending Equivalencies.' The table below the toolbar is identical to the one in the previous screenshot.

Source Environment ↑	Source Company	Source Table ↑	Name	Source Record	Target Environment ↑	Target Company	Target Table ↑	Name	Target Record	Origin	Source Template	Target Template	Missi...	Mar... for Delete
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00060	SandboxDev	CRONUS ES	18	Customer	Customer: K00060	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00070	SandboxDev	CRONUS ES	18	Customer	Customer: K00070	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00020	SandboxDev	CRONUS ES	18	Customer	Customer: K00020	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input checked="" type="checkbox"/>

On this page, we will first try to read a source record using the 'Get Source Records' action.



En la página que nos muestre escogeremos la fuente de la información (inquilino y empresa), la entidad (tabla) y definiremos los filtros que deseemos.



It is mandatory to enter at least one field in the 'Source Equivalence Filters' section, even if we are not applying any filtering. This prevents us from accidentally retrieving all records from the table. By doing this, we indicate to Open Entity that we intentionally want to retrieve all existing records and that our action is deliberate.

If we want to filter the data capture, we will write a filter in the 'Filter String' column.

When we execute this Equivalences 'Launcher', it will bring the requested information to the previous 'Inbox of Equivalences' page. However, the current page will not disappear until the 'Close' button is clicked. This behavior is intentional so that we do not have to repeatedly enter and exit to retrieve more equivalences from other information sources or tables.

When exiting the 'Capture Source Equivalences' page with the Close button, we will be able to see the 'half' of the entry in our 'Inbox of Equivalences' page. Now we only need to assign the remaining half by selecting the Destination or Current Table in the 'Table Id' column and then clicking on the box in the Selector column, which will display a list of data from which we can select the desired record.

In the current case, we have selected the Vendor table and code 50000.

Source Environment ↑	Source Company	Source Table ↑	Name	Source Record	Table Id	Target Name	Sele...	Target Record Id
→ <u>OpenEntity_Demo</u>	CRONUS ES	23	Vendor	Vendor: 10000	23	Vendor	<input type="checkbox"/>	Vendor: 500...
OpenEntity_Demo	CRONUS ES	23	Vendor	Vendor: 20000	0		<input type="checkbox"/>	
OpenEntity_Demo	CRONUS ES	23	Vendor	Vendor: 30000	0		<input type="checkbox"/>	
OpenEntity_Demo	CRONUS ES	23	Vendor	Vendor: 40000	0		<input type="checkbox"/>	
OpenEntity_Demo	CRONUS ES	23	Vendor	Vendor: 50000	0		<input type="checkbox"/>	
OpenEntity_Demo	CRONUS ES	23	Vendor	Vendor: 82000	0		<input type="checkbox"/>	

Once the equivalence is completed, we can now create it as a definitive equivalence using the 'Create Equivalence' action. The 'Create All Records Equivalences' action serves the same purpose as 'Create Equivalence' but applies to ALL ENTRIES THAT ARE COMPLETED (source and destination). Those still pending will remain in this 'folder' until they are completed and become definitive equivalences or are deleted.

The **Delete All Records (Equivalence Bin)** action, after confirmation, will delete all entries on the page, whether they are completed or not.

Source Environment ↑	Source Company	Source Table ↑	Name	Source Rec	Name	Sele...	Target Record Id	
→ <u>OpenEntity_Demo</u>	CRONUS ES	23	Vendor	Vendor: 10000	23	Vendor	<input type="checkbox"/>	Vendor: 500...
OpenEntity_Demo	CRONUS ES	23	Vendor	Vendor: 20000	0		<input type="checkbox"/>	

Once accepted as a valid equivalence using the **Create Equivalence** action, the new manually created equivalence will appear in the list and will be operational for all source templates that can use it.

Source Environment ↑	Source Company	Source Table ↑	Name	Source Record	Target Environment ↑	Target Company	Target Table ↑	Name	Target Record	Origin	Source Template	Target Template	Missi...	Mar... for Delete
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00060	SandboxDev	CRONUS ES	18	Customer	Customer: K00060	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00070	SandboxDev	CRONUS ES	18	Customer	Customer: K00070	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: C00020	SandboxDev	CRONUS ES	18	Customer	Customer: K00020	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input checked="" type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 10000	SandboxDev	CRONUS ES	18	Customer	Customer: K00110	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 20000	SandboxDev	CRONUS ES	18	Customer	Customer: K00100	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 30000	SandboxDev	CRONUS ES	18	Customer	Customer: K00120	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 40000	SandboxDev	CRONUS ES	18	Customer	Customer: K00130	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	CRONUS ES	18	Customer	Customer: 50000	SandboxDev	CRONUS ES	18	Customer	Customer: K00140	Automatic	CUSTEXPOR...	CUSTEXPOR...	<input type="checkbox"/>	<input type="checkbox"/>
OpenEntity_Demo	⋮ CRONUS ES	23	Vendor	Vendor: 10000	SandboxDev	CRONUS ES	23	Vendor	Vendor: 50000	Manual			<input type="checkbox"/>	<input type="checkbox"/>

It is possible that destination records may be deleted at some point due to maintenance or other plausible reasons. When an export is performed at the source and the equivalence is not found at the destination, the program will detect this and mark the box in the 'Missing' column. From that point on, this equivalence will be disabled. With the **Delete Missings** action, we can permanently delete these lost equivalences.

Similarly, the source record may have already disappeared. With the **Get Record Id** action, we can also check if it exists; if it does not, the 'Source Record' column will be cleared, and the 'Missing' field will be marked. This equivalence, without a source, obviously will not work, and we can delete it as well.

Lastly, note that the 'Marked for Delete' column is used exclusively in the context of webhooks combined with Custom Templates that use Equivalences and serves as a notification that a deletion of the record has been reported at the source, although it still exists at the destination.

To see a demonstration of this combination on YouTube: https://youtu.be/VGfOKFDxUZ0?si=Zm9_7-npMAgVp1QQ