Objective: Create records and automate FedEx shipping labels for each 'packing slip'. Create two new sublists on the dashboard. One referencing **QA records** from a search and the other referencing **Vendor Box Items** which will be manually added by users on the dashboard.

Current Process: User hits 'print' button on the vendor box dashboard and a packing slip prints for each vendor. If value of packing slip exceeds 70k then a new packing slip will create for that vendor After the first box creates, the rest of the boxes should have an insurance limit of 50k. Currently, this only lists line items as records. User must manually write and calculate values for QA records and any additional items that are not line items.

New Process:

Create a Box Record for every Packing Slip

1. Replace **'Print'** button with **'Create Vendor Box'**

Box Record link: https://system.sandbox.netsuite.com/app/common/custom/custrecord.nl?id=592&e=T

▪ When user hits **'Create Vendor Box'** a box record will create for all sublists and combine them into one box record. These records include line items, QA records and Vendor Box Items. Each box will have a sublist for each record referencing the items included in the packing slip. Each record will be linked to the box record. Once the box reaches a limit of 70k for the insurance value of the vendor, a new box will create. After the first box creates, the rest of the boxes should have an insurance limit of 50k.
   o **Exceptions**
      ▪ *All QA records for Unique New York will combine into their own box (same insurance limits apply)*
      ▪ *All record types for vendor **Casting House** will combine in their own box (no insurance limits) There will always be one box for casting house.*
1. The box record will populate with the following fields: (will give additional requirements for label creation soon)
   o **SHIPPING LABEL** (Field ID: custrecord_box_shipping_label) - A FedEx label will create for each box
      ▪ Label will download to the SHIPPING LABEL field
      ▪ **DO NOT CREATE** a label under the following conditions:
         • Vendor = 'Casting House'
         • Vendor = 'Unique New York' and Record Type = 'QA Record'
   o **INSURANCE VALUE** (Field ID: custrecord_box_insurance_value) – this will sum the insurance value for all records
      ▪ If record *= line item*, then pull insurance from Item Link Insurance field, if null then pull the full production insurance value
      ▪ If record *= qa record* source from search insurance value field
      ▪ If record *= vendor box item* source from insurance field (Field ID: custrecord_vbi_insurance)
   o **Address (Tab)** – this will sync from the vendor preferred address fields

- COUNTRY (Field ID: custrecord_box_country)
- ATTENTION (Field ID: custrecord_box_attention)
- ADDRESSEE (Field ID: custrecord_box_addressee)
- PHONE (Field ID: custrecord_box_phone)
- ADDRESS 1 (Field ID: custrecord_box_address1)
- ADDRESS 2 (Field ID: custrecord_box_address2)
- CITY (Field ID: custrecord_box_city)
- STATE (Field ID: custrecord_box_state)
- ZIP (Field ID: custrecord_box_zip)
  - **SHIPPING METHOD** (Field ID: custrecord_box_shipping_method) – this will default as 'Web Services - FedEx Priority Overnight®' but will have the capabilities of being editable
  - **SHIP DATE** (Field ID: custrecord_box_ship_date): Ship Date *(Field ID: custrecord_box_ship_date)*= Today's Date
  - **TOTAL ITEMS** (Field ID: custrecord_box_record_total_items): Sum of the items on each sublist (qa record/line item/vendor box item)

2. When a QA record is added to a box record, that box record will sync to the <u>BOX RECORD</u> field on the QA record *(Field ID: custrecord_box_record_qa)*
3. When a Vendor Box Item is added to a box record, that box record will sync to the <u>BOX RECORD</u> field on the QA record *(Field ID: custrecord_vbi_box_record)*
4. When a Line Item is added to a box record, that box record will sync to the <u>BOX RECORD</u> column field *(Field ID: custcol_box_record_po)*
5. Record should only be added to one box record – once assigned a box the record will not be added to another box record

Create a 'Update Packing Slip' Button

- This will recalculate the <u>insurance value</u>, <u>total items</u> and create a new packing slip pdf. This will be used if a user adds another item after the boxes are created.

Dashboard Enhancements:

2. Add the ability to sort the following columns:
   a. Status
   b. Item Link
   c. Delivery Date
      i. This column needs to be added to dashboard between DATE SENT FROM SF and INSURANCE VALUE
3. Change field display type of <u>item link</u> column to **inline** and **hyperlink** the record
4. Make the <u>INSURANCE VALUE</u> column an editable field
5. <u>CUSTOMER SELECTED GEM NOTIFICATION</u> column should pull the field of the 'created from' record instead of the purchase order
   a. Make this field not editable
6. Only one user can update the dashboard now– can you look into how to optimize this script so that up to 4 users are able to update?
7. Add <u>status</u> filter
8. Create a new sublist of QA records that include QA Sendbacks (See Image 1)

a. This should pull any records that fall onto the QA Search Dashboard search
b. Include the following columns:
   i. Vendor
   ii. PO Number
   iii. Sales Order
   iv. Item
   v. Description
   vi. Insurance value
   vii. Type of QA
9. Create a new sublist of record = Vendor Box Items
   a. Record URL:
      https://system.sandbox.netsuite.com/app/common/custom/custrecord.nl?id=640&e=T
   b. This will list any records where DATE SENT FROM SF (Field ID:
      custrecord_vbi_date_sent_from_sf) = Today
10. When user filters a vendor – only create box records for that vendor

1. Add an additional column Item Link Insurance
   a. This should calculate as 80% of the amount on the item link record page
   b. This should auto-populate when user or system updates the item link field
   c. This should not be visible on the PO – this will only be used to for the vendor box dashboard
   d. Add this column to dashboard – this should be an editable field

Packing Slips:

1. Add a Ship Date at the top of the packing slip. This will default to today's date.
2. Mapping **QA Records**:
   a. Each QA record will add one line item to the packing slip grouped by vendor
      i. PO number syncs to Order# column
      ii. Description syncs to the third column
      iii. Insurance value syncs to the ins value column
3. Mapping **Vendor Box Items**:
   a. Each QA record will add one line item to the packing slip grouped by vendor
      i. PO NUMBER (Field ID: custrecord_vbi_po_number) syncs to Order# column (if blank leave empty, do not return error)
      ii. DESCRIPTION (Field ID: custrecord_vbi_item_description) syncs to the third column
      iii. INSURANCE (Field ID: custrecord_vbi_insurance) syncs to the ins value column
4. Include sum of line items on packing slips
5. Include Box Record # at the top

Vendor Box Dashboard

| Create Vendor Box | Update Date Sent from SF |

VENDOR

[_____ ▼]

Line Items · QA Sendbacks · Vendor Box Items ·

PURCHASE ORDER	VENDOR	ITEM	DESCRIPTION	STATUS	NOTES	SO IMPO...
209040	Trung Do's JD & Co.	Repair Ring .	18K White Gold Luxe Willow Halo Diamond Ring (1/2 ct. tw.), Size 6.5	Completed	Set with: - Dia stock # 2034717A 0.71 Carat, Round, Very Good Cut, J Color, VVS2 Clarity, 5.59 x 5.55 x 3.62 Measurements	6.2 Astrou says they worked o jeweler (n times). Se form befo repair

Create Vendor Box

VENDOR

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Line Items · QA Sendbacks · Vendor Box Items ·

QA VENDOR ▲	PO NUMBER	SALES ORDER	ITEM	INSURANCE VALUE	TYPE OF QA
Forgeous Jewelers	Purchase Order #207786	Sales Order #2017334948SZ6	Resize Ring	2,856	Sendback
Forgeous Jewelers	Purchase Order #208515	Sales Order #2017333371SZ425	Resize Ring	4,884	Sendback
Harout R	Purchase Order #207335	Sales Order #2017338467	BE2H21470-18KW-S85	2,392	Sendback
Sasha Primak	Purchase Order #206983	Sales Order #2017338250	BE2M2621-18KW-S12	2,392	Sendback
Sasha Primak	Purchase Order #207092	Sales Order #2017338376	BE266E-PT-S525	1,160	Sendback
Sasha Primak	Purchase Order #207202	Sales Order #2017337964	BE1M54DH-PT-N-S6	3,472	Sendback
Trung Do's JD & Co.	Purchase Order #207788	Sales Order #20173353985Z55	Resize Ring	1,952	Sendback
Trung Do's JD & Co.	Purchase Order #207829	Sales Order #20173329985Z375	Resize Ring	872	Sendback
Trung Do's JD & Co.	Purchase Order #207506	Sales Order #2016301768RP	Repair Ring	3,368	Sendback
Unique New York	Purchase Order #207123	Sales Order #2017338419	BE1PD28R15-PT-N-S675	10,096	Sendback
Unique New York	Purchase Order #207950	Sales Order #2017159327	BE2PD25R25-18KW-S6	712	Sendback
Unique New York	Purchase Order #207128	Sales Order #2017338319	BE156-18KW-N-S875	1,320	Sendback
Unique New York	Purchase Order #205149	Sales Order #2017159134	Custom Engagement Ring-PT	16,976	Sendback

Create Vendor Box

VENDOR

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Line Items · QA Sendbacks · Vendor Box Items ·

ID ▲	ITEM NAME/NUMBER	INSURANCE	VENDOR	NOTES	DATE SENT FROM SF	DESCRIPTION
1	test				6/16/2017	
2	testdiamond1				6/16/2017	