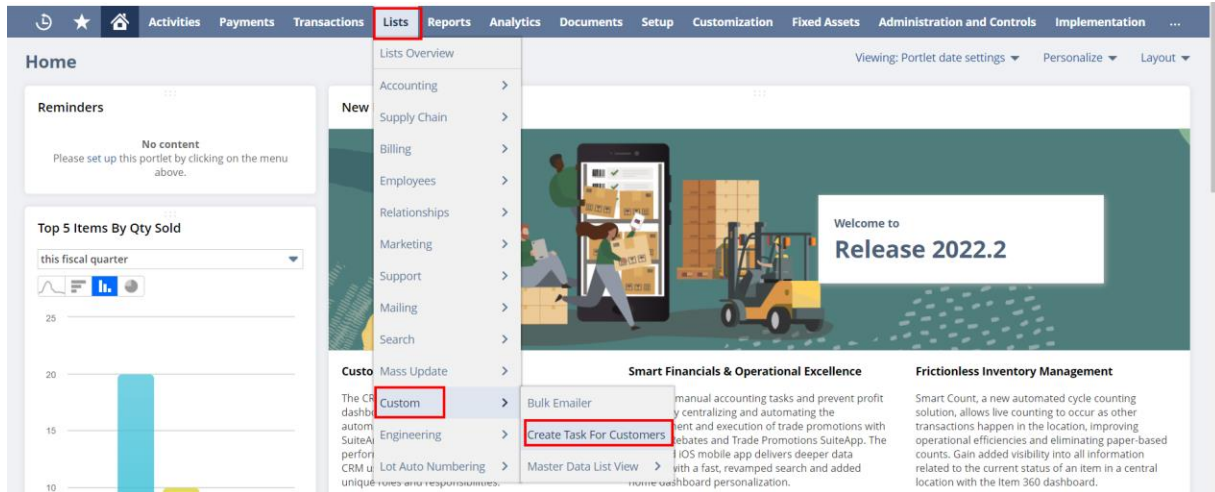


Bulk Task creation through Google Maps

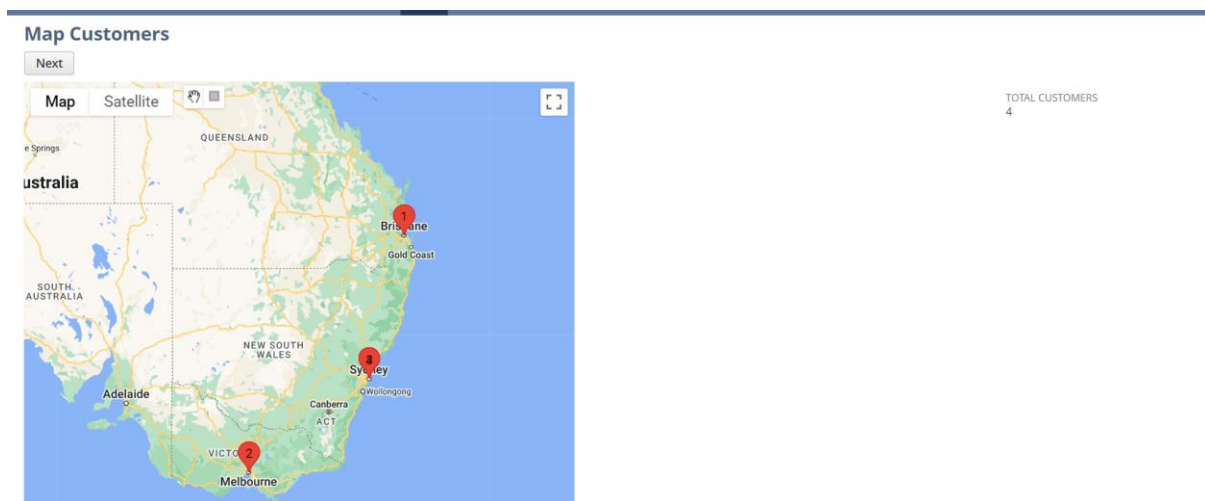
This document summarizes the setup of creating a bulk task for customers through a suitelet. A single task will create for several customers. The customers will be selected by plotting the location on the maps. The user could plot a particular location on the map and a task will be created for each of the customers in that particular location.

The navigation for this section is List > Custom > Create task for Customers



The first page consists of 5 types of filters, which are Sales rep partner, Customer category, Training Grading, HOG Brick, and Saved search. The user should select at least one filter.

The first filter is **Sales rep partners**. The user could select a sales rep partner and when the user clicks the Next button, the map will list all the customers under the selected Sales rep partner.



User could zoom out and zoom in on the map to view the whole section. Each customer will be marked using a red marker.

The second filter is **Customer Category**, which is a field on the customer record.

Customer

CUST0001:149 JJ Test 101

Edit

Back

Accept Payment

Update LSA

Sync to Shopify

Actions

Drop files here. Click for more options.

Primary Information

CUSTOMER ID
CUST0001:149 JJ Test 101

TYPE
Company

COMPANY NAME
JJ Test 101

PARENT COMPANY
CUST0001 Go Vita Group Limited

SUBSIDIARY
HERBS OF GOLD PTY LTD

REPRESENTS SUBSIDIARY

STATUS
CUSTOMER:Closed Won

CATEGORY
CO

TERMS
30EOM

EMAIL

PHONE

FAX

SALES REP
Daniel Bromley

LEAD SOURCE

WEB ADDRESS

HoG Data

OLD CUSTOMER ID
40800

RRMA ZONE

OTHER TRADING NAME

Third filter is **Training Grading** and the fourth one is **HOG Brick** where both of these values are from Customer record. Both of these values are populating on the customer record from another child record **Planograms**.

DATE ORDER

CRM FORM
Blooms

LAST SALES ACTIVITY

on Sales Customer360 Relationships Financial Support Marketing Address Preferences System Information Bank Payment Details (Debit) Bank Payment Details (Credit) In8Sync

Planogram

PLANOGRAMS

grams Attach Customise View

ID	PROMOTION AND DEALS NOTES	LOYALTY PROGRAM	ACCELERATE PROGRAM	TRAINING GRADING	HOG BRICK	REMOVE
2	JJ Test	No	Yes	4	QLD1-Burleigh	Remove

Planograms

Edit

Back

Actions

ID
2

OWNER
Jobin n jismi

DATE CREATED
25/10/2022 5:39 pm

LAST MODIFIED
25/10/2022 5:39 pm

BY
Jobin n jismi

INACTIVE

PROMOTION AND DEALS NOTES
JJ Test

LOYALTY PROGRAM

ACCELERATE PROGRAM

SHELF WIDTH
600 mm

PARENT CUSTOMER
CUST0001:149 Go Vita Group Limited : JJ Test 101

TRAINING GRADING
4

HOG BRICK
QLD1-Burleigh

The last filter is **saved search**, which lists Customer searches. To list these customer searches, there is another [saved search](#) is used, where the user could specify the internal ID of the searches, they want to list on the Saved search filter.

Activities Payments Transactions Lists Reports Analytics Documents Setup Customization Fixed Assets Administration and Controls Implementation

Filter out customers to show on map

More

Show In Map

SELECT SALES REP

CUSTOMER CATEGORY

TRAINING GRADING

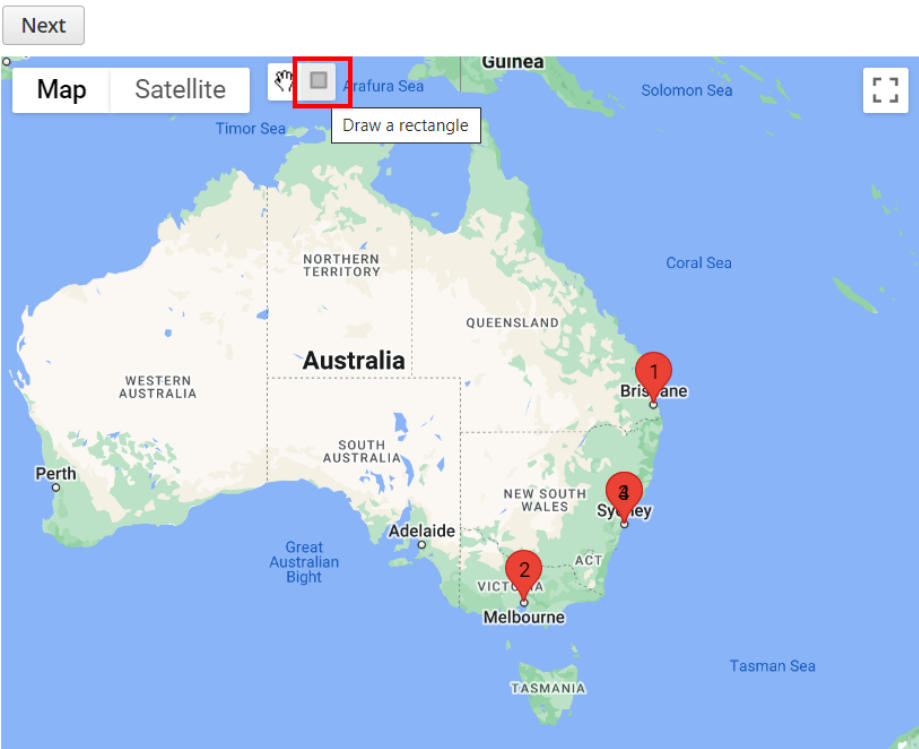
HOG BRICK

SELECT A SAVED SEARCH

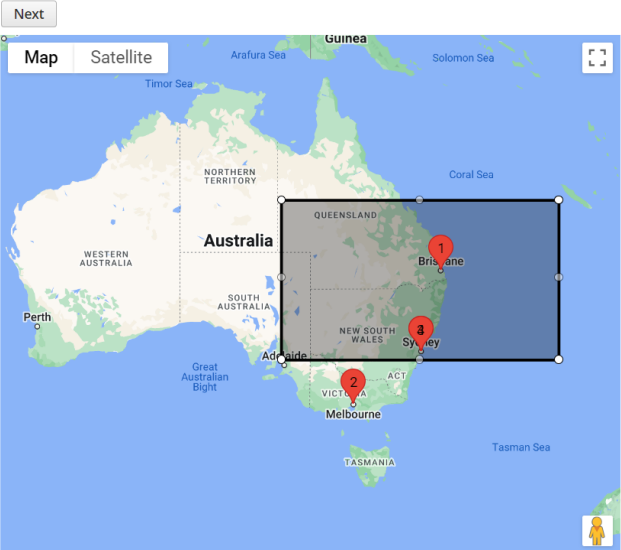
New Customers
Leads, prospects, and customer without sales activity in the last week

On the next page, user could plot the customers on the map using the square label on the map.

Map Customers



Map Customers



TOTAL CUSTOMERS
4

Activate V
Go to Setting

After plotting the customers, click on the Next button. It will lead to the 3rd page, where the plotted customer details will be listed.

Map Customers
More

Create Task
Mark All Customers
Unmark All Customers

Add Task Information

ASSIGNED TO *

PRIORITY *
Medium

START DATE *

DUE DATE *

☐ RESERVE TIME

START TIME

END TIME

Choose Customers To Create Task •

SELECT	INTERNAL ID *	CUSTOMER NAME *	TITLE *	ASSIGNED TO	PRIORITY	START DATE	END DATE	RESERVE TIME	START TIME	END TIME
<input type="checkbox"/>	3628	CUST0001:7 Go Vita Group Limited : Go Vita Springfield	Go Vita Springfield		Medium					
<input type="checkbox"/>	175684	CUST0001:149 Go Vita Group Limited : JJ Test 101	JJ Test 101		Medium					
<input type="checkbox"/>	175685	CUST0001:150 JJ Test 100	JJ Test 100		Medium					
<input type="checkbox"/>		<Type then tab>		<Type then tab>	Medium					

Add
Cancel
Insert
Remove

Create Task
Mark All Customers
Unmark All Customers

Activate Windows
Go to Settings to activate Windows.

This is the page where the task creation initializes. There are some mandatory fields are available here.

All tasks should have an assignee. This can be selected on the **Assigned To** field. The same field is also available on the sub list, where there the user could change the assignee for a particular task. All the fields on the Body level are a common field. Ie; the value on the body-level fields will be common for all the tasks. To change the values for any particular task, the user could do on the line- level.

The priority of the task can be selected on **Priority** field. User could provide a Start and Due date for the task. There is a check box available on the page **Reserve Time**, where this checkbox is checked, the user could enter Start time and End time for the task. The dropdown on the Start and End time fields consist of the time entries. Selected values will be automatically populated on the Text field near the drop down. The user could also edit the time on the Text field with the correct format.

Map Customers
More

Create Task
Mark All Customers
Unmark All Customers

Add Task Information

ASSIGNED TO *
<Type then tab>

PRIORITY *
Medium

START DATE *

DUE DATE *

☒ RESERVE TIME

START TIME
1:00 am

END TIME

Choose Customers To Create Task •

SELECT	INTERNAL ID *	CUSTOMER NAME *	TITLE *	ASSIGNED TO	START DATE	END DATE	RESERVE TIME	START TIME	END TIME
<input type="checkbox"/>	3628	CUST0001:7 Go Vita Group Limited : Go Vita Springfield	Go Vita Springfield						
<input type="checkbox"/>	175684	CUST0001:149 Go Vita Group Limited : JJ Test 101	JJ Test 101				Yes	1:00 am	

The user could add more customers on the list by selecting the customers on the sub list. When the customer is selected the Internal ID value will be auto populated.

ASSIGNED TO: <Type then tab>

PRIORITY: Medium

START DATE:

DUE DATE:

START TIME: 1:00 am

END TIME:

Choose Customers To Create Task

SELECT	INTERNAL ID *	CUSTOMER NAME *	TITLE *	ASSIGNED TO	PRIORITY	START DATE	END DATE	RESERVE TIME	START TIME	END TIME
	3628	CUST0001:7 Go Vita Group Limited : Go Vita Springfield	Go Vita Springfield		Medium			Yes	1:00 am	
	175684	CUST0001:149 Go Vita Group Limited : JJ Test 101	JJ Test 101		Medium			Yes	1:00 am	
	175685	CUST0001:150 JJ Test 100	JJ Test 100		Medium			Yes	1:00 am	
	3723	CUST0001:102 Go Vita Group Limited : Go Vita Engadine	Go Vita Engadine	<Type then tab>	Medium			Yes	1:00 am	

Tasks will be created for the lines, which are checked the SELECT checkbox. If there are any open tasks are available with the same assignee and customer, an alert will be populated and when the OK button clicks, the duplicate lines will be removed and tasks will be created for the remaining lines.

ORACLE NETSUITE | **SANDBOX herbsofgold** | 6687177-sb2.app.netsuite.com says

Open tasks existing for the task(s)
 1. Go Vita Springfield at line Number 1
 2. JJ Test 101 at line Number 2
 Task won't be created for these tasks

Map Customers

Add Task Information

ASSIGNED TO: Beka Dennis

PRIORITY: Medium

START DATE: 26/10/2022

DUE DATE: 28/10/2022

RESERVE TIME: ☒

START TIME: 1:00 am

END TIME:

Choose Customers To Create Task

Task Records To Be Created

OWNER: Jobin n Jjsmi

DATE CREATED: 26/10/2022 12:36 am

LAST MODIFIED: 26/10/2022 12:36 am BY: Jobin n Jjsmi

INACTIVE: ☐

CREATED BY: Jobin n Jjsmi

DATA TO PROCESS:

```
[{"internalID":"175685","customerName":"175685","title":"JJ Test 100","assignedTo":"212","priority":"Medium","startDate":"26/10/2022","endDate":"28/10/2022","isReservedTime":true,"startTime":"1:00 am","endTime":""}, {"internalID":"3723","customerName":"3723","title":"Go Vita Engadine","assignedTo":"233","priority":"Medium","startDate":"26/10/2022","endDate":"28/10/2022","isReservedTime":true,"startTime":"1:00 am","endTime":""}]
```

STATUS: Pending

Notes Files Workflow

User Notes System Notes

VIEW: Default

When this page is submitted, all the details will be stored in a custom record [Task Records To Be Created](#) a Map/Reduce script will be executed in the background. Original Task records will be created from that Map/Reduce script.

