**TECHNICAL DESIGN DOCUMENT**

**1099 Custom Vendor Center Role Customization**

**08/17/2018**

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1. Document Information:

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| --- | --- |
| Document Name | **Expense Form Request Workflow** |
| Document Author | **Anusha Meka** |
| Document Version | 1.0 |
| Document Status | Active |
| Date Released | TBD |

1. **Functional Overview:**

1099 Vendor submits the purchase order based on Fee Schedule.

1. **Flow Chart:**

*No flowchats*

1. **Integration involved:**

*No Integrations Involved*

1. **Detailed Logic Flow:**
   1. When a vendor enters Claim #, Carrier Name and Insured Name will be auto populated.
   2. Popup an alert when Carrier name is selected without selecting claim #.
   3. Calculate line item value using Invoice gross loss and Fee Schedule.
   4. Shows an alert when Fee schedule is selected without entering values for Invoice gross loss.
   5. Restrict line item to only one. More than one line item will not be calculate fee schedule except manually.

**General Technical Specification:**

* 1. **Custom Fields:**

*Instructions: Provide the custom field details used if any*

|  |  |  |
| --- | --- | --- |
| **Field Name** | | **Field ID** |
| [CLAIM #](javascript:void(%22help%22)) (Already exiting Field) | custbody\_claim\_num | |
| [Carrier Name](https://system.netsuite.com/app/common/custom/bodycustfield.nl?id=618&e=T) | custbody\_carrier\_name\_po | |
| [Insured Name](https://system.netsuite.com/app/common/custom/bodycustfield.nl?id=536&e=T)(Already exiting Field) | custbody\_sxrd\_insured\_name | |
| [Fee Schedule PO](https://system.netsuite.com/app/common/custom/bodycustfield.nl?id=622&e=T)(Hidden) | custbody\_fee\_schedule\_po\_2 | |
| [Invoice Gross Loss](https://system.netsuite.com/app/common/custom/bodycustfield.nl?id=508&e=T)(Already exiting Field) | custbody\_sxrd\_invoice\_gross\_loss | |
| [Fee Schedule Purchase Order](https://system.netsuite.com/app/common/custom/bodycustfield.nl?id=620&e=T) | custbody\_fee\_schedule\_po | |
|  |  | |

* 1. **Custom record:**

*Instructions: Provide the custom record details used if any*

|  |  |  |
| --- | --- | --- |
| **Record Type Name** | | **Record Type ID** |
|  |  | |
|  |  | |

* 1. **Fee Schedule:**

|  |  |
| --- | --- |
| **Fee Schedule** | **Fee Schedule ID** |
| Review fee | 128 |
| Re-write Fee | 129 |
|  |  |

* 1. **Item:**

|  |  |
| --- | --- |
| **Item** | **Item ID** |
| [Review/ Re-write Fee](https://system.netsuite.com/app/common/item/item.nl?id=254) | [254](https://system.netsuite.com/app/common/item/item.nl?id=254) |

* 1. **Custom Lists:**

|  |  |
| --- | --- |
| **List** | **List ID** |
| PO Fee Schedule List | PO Fee Schedule List |

* 1. **Saved Search:**

*No Saved searches involved*

|  |  |
| --- | --- |
| **Save Search Name** | **Save Search ID** |
|  |  |

* 1. **Scripts Used:**

*Instructions: Provide the scripting details used if any*

|  |  |  |
| --- | --- | --- |
| **Script Type** | **Script Name** | **Script ID** |
| Suitelet | [SUT] Vendor Center Suitlet2\_0 | customscript\_sut\_ven\_cen\_2\_0 |
| Client | PO Fee Schedule script | customscript187 |
| User Event | [UES]Vendor Name | customscript\_vendor\_center\_vendor\_name |

* 1. **Role:**

|  |  |
| --- | --- |
| **Name** | **Name ID** |
| Center Tab | [Purchase Order Form](https://system.na2.netsuite.com/app/common/custom/custsection.nl?id=32) |
| Center Category | Purchase Order |
|  |  |

* 1. **Workflows Used:**

*Instructions: Provide the Workflow details used if any*

|  |  |
| --- | --- |
| **Script Name** | **Script ID** |
|  |  |

* 1. **Templates Used:**

*No templates used*

|  |  |
| --- | --- |
| **Template Name** | **Purpose** |
|  |  |

## Script and Function Details (post development):

* **Script Type 1:** Client
* **Record Type:** Purchase Order
* **Event Type:** FieldChange
* **Detailed logic flow:**

1. When Carrier Name is select on Purchase Order, vendor must be able to view its corresponding “Fee Schedule PO” and set it on “Fee Schedule Purchase Order” field.
2. Get text for “Fee Schedule PO” using po\_fee=rec.getText({fieldId:'custbody\_fee\_schedule\_po'});
3. If po\_fee is not null, set its value using rec.setText({fieldId:'custbody\_fee\_schedule\_po\_2',text:po\_fee});
4. Now get the value from above and check whether its null or not using

var rec\_Id=rec.getValue({fieldId:'custbody\_fee\_schedule\_po\_2'});

if(rec\_Id!='' && rec\_Id!=null)

1. Get the gross loss value and “fee schedule PO” and set the line item.
2. If the user changes “fee schedule PO”, then field change will trigger and checks for gross loss. If gross loss is not present , it trows an alert to enter gross loss. When grossloss and “fee schedule PO” are present, it calculates line item.
3. When claim # is entered, Carrier Name and Insured gross value should be autopopulated.
4. Get the Claim # using var claim\_num = rec.getValue({fieldId :'custbody\_claim\_num'});
5. Write the suitelet for searching claim # in sales order.
6. Call from suilelet to client fieldchange using url.
7. var output\_url='https://system.na2.netsuite.com/app/site/hosting/scriptlet.nl?script=166&deploy=1';
8. output\_url+='&claim\_num='+claim\_num;

* **Script Type 2:** Suitelet
* **Record Type:** PurchaseOrder
* **Event Type:**
* **Detailed logic flow:**

1. Get the claim number from client script using **var** claim\_num = context.request.parameters.claim\_num;
2. Search for the claim number in Sales order and obtain Carrier Name and Insured name.
3. Send the parameters to the client script using context.response.write(''+entity\_name+'&#&'+insur\_name+'');

**Script Type 2:** UserEvent

**Record Type:** PurchaseOrder

**Event Type:** BeforLoad

**Detailed logic flow:**

1. Get the user context and email and search the vendor using email if the role is 1099 Custom Vendor Center role.
2. Set the vendor when vendor opens Purchase Order in 1099 Custom vendor Center.

## Post Deployment Activities:

*No post deployment activities*

|  |  |
| --- | --- |
| **Script Name** | **Activity** |
|  |  |
|  |  |

1. **Document Change history:**

|  |  |  |  |
| --- | --- | --- | --- |
| Author | **Version** | **Date** | **Description of Changes** |
| Anusha Meka | 1.0 | 08/17/2018 | Document Created |
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