**TECHNICAL DESIGN DOCUMENT**

**Send Task to Accounting Team When a New Adjuster is assigned to his/her First Claim**

**06/06/2019**

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1. Document Information:

|  |  |
| --- | --- |
| Document Name | **Automated Bill Payments** |
| Document Author | **Anusha Meka** |
| Document Version | 1.0 |
| Document Status | Active |
| Date Released | TBD |

1. **Functional Overview:**

When a new adjuster is assigned to his/her first claim, assign task to accounting team. This task will help accounting team to identify new adjuster and enter adjuster bank details in Netsuite Vendor Record.

**Flow Chart:**

*No flowchats*

1. **Integration involved:**

*No Integrations Involved*

1. **Detailed Logic Flow:**

Identify new and check if claim is adjuster’s first claim. If yes, assign task to accounting team.

**General Technical Specification:**

* 1. **Custom Fields:**

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

|  |  |  |
| --- | --- | --- |
| **Field Name** | | **Field ID** |
| Assigned First Claim | custentity\_assignment\_for\_task | |

* 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** |

* 1. **Item:**

|  |  |
| --- | --- |
| **Item** | **Item ID** |

* 1. **Custom Lists:**

|  |  |
| --- | --- |
| **List** | **List ID** |
|  |  |

* 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** |
| Scheduled | AssignTaskToNewAdjusterForNewAssignment | customscript\_assign\_task\_adj\_assignment |

* 1. **Role:**

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

* 1. **Workflows Used:**

*Instructions: Provide the Workflow details used if any*

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

* 1. **Templates Used:**

*No templates used*

|  |  |  |  |
| --- | --- | --- | --- |
| **Template Name** | **ScriptID** | **Record** | **Purpose** |
| Custom Sales Order PDF/HTML Template | CUSTTMPL\_100\_4667405\_560 | Claim |  |

## Script and Function Details (post development):

* **Script Type 1:** Scheduled
* **Record Type:** Claim (Sales Order)
* **Event Type:**
* **Detailed logic flow:**

1. Search the sales order with the following criteria.

**var** salesorderSearchObj = search.create({

type: "salesorder",

filters:

[

["type","anyof","SalesOrd"],

"AND",

["systemnotes.field","anyof","CUSTBODY\_SXRD\_ADJUSTER"],

"AND",

["systemnotes.type","any",""],

"AND",

["systemnotes.date","within","today"],

"AND",

["custbody\_sxrd\_adjuster.custentity\_assignment\_for\_task","is","F"],

"AND",

["custbody\_sxrd\_adjuster.datecreated","onorafter","6/4/2019 12:00 am","6/4/2019 12:00 am"]

],

columns:

[

// search.createColumn({name: "trandate", label: "Date"}),

// search.createColumn({name: "type", label: "Type"}),

search.createColumn({name: "tranid", summary: "GROUP", label: "Document Number"}),

// search.createColumn({name: "entity", label: "Name"}),

search.createColumn({name: "custbody\_sxrd\_adjuster", summary: "GROUP", label: "Adjuster"})

]

});

1. Get the value of the vendor.
2. Load the vendor record and get the value for “Assigned First claim” field value as shown below.

**var** istrue = venRecord.getValue({ fieldId: 'custentity\_assignment\_for\_task'});

1. If “istrue” is false, then check the box to true and create task record and assign it to a person.

venRecord.setValue({fieldId: 'custentity\_assignment\_for\_task', value: **true**, ignoreFieldChange: **true**});

**var** recordId = venRecord.save();

log.debug('recordId',recordId);

**var** taskRecord = record.create({type: record.Type.TASK });//,defaultValues: null

//.setValue{title:'start', priority : 'medium', status: 'notStarted', company: recordId, assigned: 22085} });

taskRecord.setValue({fieldId: 'title',value: adjEntitiId});;

// ignoreFieldChange: true

taskRecord.setValue({fieldId: 'priority',value: 'MEDIUM'});

taskRecord.setValue({fieldId: 'status',value: 'NOTSTART'});

taskRecord.setValue({fieldId: 'company',value: recordId});

taskRecord.setValue({fieldId: 'assigned', value: 22085});

taskRecord.setValue({fieldId: 'sendemail', value: **false**});

//taskRecord.setValue({fieldId: 'startdate'value: 4/9/2019});

//taskRecord.setValue({fieldId: 'duedate' value: 4/9/2019});

taskid = taskRecord.save();

Post Deployment Activities:

*No post deployment activities*

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

1. **Document Change history:**

|  |  |  |  |
| --- | --- | --- | --- |
| Author | **Version** | **Date** | **Description of Changes** |
| Anusha Meka | 1.0 | 01/03/2018 | Document Created |
|  |  |  |  |
|  |  |  |  |