**TECHNICAL DESIGN DOCUMENT**

**Expense Form Customization**

**05/09/2018**

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1. Document Information:

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

1. **Functional Overview:**

Examiner will enter Claim number in Expense form. After submitting the form, claim data is pulled from claim record to expense form. After entering data in the form, CPM and accountant will approve/ reject the form. An email is received by the examiner regarding approval status

1. **Flow Chart:**

*No flowchats*

1. **Integration involved:**

*No Integrations Involved*

1. **Detailed Logic Flow:**

The Expense approval request will be sent to CPM. CPM approves/ rejects it. An email is sent to Accountant. Accountant will approve/ reject and sends email to examiner regarding approval status.

Accountant will be able to go to claim record.

1. **General Technical Specification:**
   1. **Custom Fields:**

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

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

* 1. **Custom record:**

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

|  |  |  |
| --- | --- | --- |
| **Record Type Name** | | **Record Type ID** |
| [Expense Form](https://system.na2.netsuite.com/app/common/custom/custrecord.nl?id=283&e=T) | customrecord283 | |
| [Subrecord Expense Form](https://system.na2.netsuite.com/app/common/custom/custrecord.nl?id=284&e=T) | customrecord\_subrecord\_expense\_form | |

* 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** |
| Suitlet | ExpenseForm Suitelet | customscript\_expenseformsuitelet |
| Client | Client Expense Approval | customscript\_cliexpenseapproval |

* 1. **Workflows Used:**

*Instructions: Provide the Workflow details used if any*

|  |  |
| --- | --- |
| **Script Name** | **Script ID** |
| [Expense Form Approval WF](https://system.na2.netsuite.com/app/common/workflow/setup/workflowmanager.nl?id=14) | customworkflow\_wf\_exp\_form |

* 1. **Templates Used:**

*No templates used*

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

## Script and Function Details (post development):

* **Script Type 1:** Suitelet
* **Record Type:** Invoice Adjustment Request
* **Event Type:**
* **Detailed logic flow:**

1. Create Invoice Adjustment Request form using nlapiCreateForm.
2. After submitting, get the context using var o\_context = nlapiGetContext();**var** i\_user\_logegdIn\_id = o\_context.getUser();

**var** supervisor1 = nlapiLookupField('employee',

1. Search for the invoice id and pull the invoice record details into the Invoice adjustment request form.
2. Set current day date.
3. Add the sublist column names using

**var** sublist = form.addSubList('custpage\_sublist','inlineeditor', 'Items');

1. Get the client script using

form.setScript('customscript\_cliexpenseapproval');

1. Add the approval button using

form.addButton('approvebutton','Send For Approval','send\_approval\_status()');

* **Script Type 2:** Client Script
* **Record Type:** Invoice Adjustment Request
* **Event Type:** pageinit
* **Detailed logic flow:**

1. Get the fields of the custom record (Invoice Adjustment Request) using

nlapiGetFieldValue('custpage\_invnum2');

1. Set all the field values to the custom record
2. Set the child for the (Invoice Adjustment Request) and set the line item count using

**var** sublistCount = nlapiGetLineItemCount('custpage\_sublist');

1. Set all the line items in the sub record and attach it to the Suitlet using

**var url = nlapiResolveURL('SUITELET','customscript\_expenseformsuitelet', 'customdeploy1');**

## Post Deployment Activities:

*No post deployment activities*

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

1. **Document Change history:**

|  |  |  |  |
| --- | --- | --- | --- |
| Author | **Version** | **Date** | **Description of Changes** |
| Anusha Meka | 1.0 | 05/09/2018 | Document Created |
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