Create Transaction

Installation and usage

Contents

Overview

This bundle contains a workflow action script to create a transaction. Creating transactions via workflow is not yet supported in standard.

Installation

Install the bundle XXXX, Create Transaction from production account XXXX. The new account must first have been given permission to the bundle.

Contents

The record type Transaction queue is a help record type used by the script to monitor the script execution. The transaction queue is also returned to the workflow and can be subscribed to.

There are two suitescripts:
The workflow action script is the script called from the workflow.
The scheduled script is called by the action script when needed.

Usage

The workflow action script needs to be deployed to the record type of the workflow to use the action.

There are 12 in parameters:
Transaction Type: The internal id of transaction type to create, e.g. invoice

Saved Search: The saved search that contains all data needed to create the transaction. The saved search should return one row for each transaction line. The columns of the saved search are mapped to the transaction fields by the label. Body fields should be labeled H:field_name (e.g. H:entity) and Column fields should be labeled L:list_type:column_name (e.g. L:item:quantity).

Group by: The column in the saved search to group the transaction on identified by its label. All consecutive rows in the search with the same value in the group by column will be on the same transaction.

Attach to record type: If the transaction created should referenced on a different record, give the record type of that record.
Attach to record id: Give the internal id of the record to reference the created transaction.
Attach to field: Give the field in which to reference the created transaction.

Transaction form: Select the form to use for the created transaction.

Filter by: The internal id to filter the saved search on. The filter by value will be compared to the column in the saved search with the label of filter_by.

Single Invoice: If this checkbox is checked the transaction will be created directly by the action script. If it is unchecked the action script will call the scheduled script, which will handle the creation for governance purposes.

Search record type: The record type of the saved search stated in the Saved Search parameter.

Filer by operator: The operator to use when comparing the Filter by internal id to the filter_by column. Is, equalto, onorbefore, etc.

Transaction date: The transaction date to set on the created transaction.