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| **Client Name:** | Infinity Global | | | | | | **Start Date:** |  | |
| **Project Name:** | Infinity Global Implementation | | | | | | **End Date:** |  | |
| SOW Authors/Contact: |  | | | | | | | | |
|  | | |  | | | | | |
| Change Date: | 4/1/2022 | | | | | | **Version:** | 1 | |
| Justification | | | | | | | | | |
| Infinity Global needs to use the Opportunity record in order to generate sales orders via templates. We are using the opportunity record as the template. Infinity Global is always updating their pricing on items and we want to ensure that Sales Orders created from Opportunities are using the most up-to-date pricing from the item record. | | | | | | | | | |
| **Scope of Work** | | | | | | | | | |
| Opportunity record: (It has been renamed to NEW STORE ORDER TRANSFER TO SO in their sandbox.)    IF you look at the item record 001022-00 (ID: 45), notice that the price is actually 62.70.  But the template shows 55 because this was the price at the time of Opportunity creation.  Netsuite does not automatically update the price on existing orders.  I am looking for as script that will run on the opportunity record to update the Prices on the Items tab. Ideally, if we had a button on the Opportunity record to “Update Item Prices” so that the system will pick up the New price level on the item record, that would be great.  They way to change the opportunity’s price rate is to Edit it, go to the line level, toggle the price level to something different (ex base price, then toggle back to 10% markup). You will notice the Rate changes to 62.70.  Screenshot of Opportunity after toggling the Price level, Rate now = 62.50.    We are looking for the script to do this automatically so that the new price rate is picked up for the 10% markup price level on the item record.  Can we also setup a popup on the opportunity record to remind users to update the price, before creating the sales order. The message can say “Please remember to click on the “Update Item Prices” button before creating a New Sales Order.  Definitions:  **Agent** – The user or system agent which performs the current step in the process (e.g. User, Workflow, Script, Integration)  **Context** – The execution context (e.g. User Interface, Web Services Integration, E-Commerce***. If multiple, include all***)  **Event** – A description of the task being performed   |  |  |  | | --- | --- | --- | | **Use Case 1** | | | | Agent | Context | Event | | 1. User | UI | 1. **Opportunity already created. With a Price level of 10% markup and a rate 50. Then user goes into the item record and manually updates the item’s 10% markup price level to 65.** User clicks on Custom buttom: “Update Item Prices” on the Opportunity record | | 2) User | UI | 2. User does not click on the Update Item Prices button and tries to create a sales order. | |  |  |  |   **Expected Result:**   1. Item on the line level of the opportunity has a new price rate of 65, based on the item record.   2. User error is prompted stating that they need to update the item’s price rate before creating the sales order.  **Reporting Requirements:**  **List of existing customizations being used in this requirement:** | | | | | | | | | |
| **Assumptions** | | | | | | | | | |
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| **Project Deliverables** | | | | | | | | | |
| All deliverables will be consistent with those defined in the SOW. | | | | | | | | | |
| **Additional Hours** | | | | | | | | | |
| **Task** | | **Area** | **Type** | | **Hours** | **Rate** | **Total** | **Notes** |
| Scripted customization | | Order 2 Cash |  | | 0 | 0 |  |  |
| **TOTAL** | | | | | | | **0** |  |

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| **Change Order Review and Approval** | | | |
| Caravel Project Sponsor: |  | **Date:** |  |
| Client Sponsor: |  | **Date:** |  |

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