



7/22/2015 - Tips and Tricks

Date Last Fulfilled

This process is used to create a custom field on Item Records that is updated with the current date each time an item is fulfilled. The goal is to be able to use that field in a Saved Search to look at inventory that may not have moved within a given time frame, i.e. 30, 60, 90, 120 days.

1. Create a custom field on the Item Record with a type of Date.
 - a. On the Display tab choose where you want the field displayed on your Item Record form

Custom Item Field ← → List

Save **Cancel** **Reset** **Change ID** **Apply to Forms** **Actions**

* LABEL: DESCRIPTION:

ID: TYPE:

INTERNAL ID: LIST/RECORD:

OWNER:

STORE VALUE: ☒ USE ENCRYPTED FORMAT: ☐ SHOW IN LIST: ☐ GLOBAL SEARCH: ☐ RECORD IS PARENT: ☐

Applies To **Display** **Validation & Defaulting** **Sourcing & Filtering** **Access** **History**

INVENTORY ITEM: ☒ GROUP: ☐

NON-INVENTORY ITEM: ☐ KIT/PACKAGE: ☐

SERVICE: ☐ SUBTYPE: BOTH ☒ PURCHASE ☐ SALE ☐

OTHER CHARGE: ☐ PRINT ON PRICE LIST: ☐

Save **Cancel** **Reset** **Change ID** **Apply to Forms** **Actions**

2. Next create a Saved Search to return the items that have been fulfilled today
 - a. New Saved Item Search
 - i. Criteria:
 1. Transaction: Type = Item Fulfillment
 2. Transaction: Date = today
 3. Date Last Fulfilled (Custom) = is not on today
 - ii. Results tab
 1. Only needs to be the Name field

FEEU

Criteria **Results** **Highlighting** **Available Filters** **Audience** **Roles** **Email** **Audit Trail** **Execution Log**

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS ☐

Standard • **Summary** •

FILTER *	DESCRIPTION *	FORMULA
Transaction : Type	is Item Fulfillment	
Transaction : Date	is on today	
Date last fulfilled (Custom)	is not on today	

Add **Cancel** **Insert** **Remove**

Save & Run **Reset** **Cancel** **Preview** **Change ID** **Actions**

3. Next create the Workflow to update the field Date Last Fulfilled
 - a. Create a new Workflow with the following parameters:
 - i. Record Type = Item
 - ii. Sub Type = Inventory Part
 - iii. Initiation = Scheduled
 - iv. Saved Search = Date last fulfilled search (or whatever you named the saved search you just made)
 - v. Repeat is checked
 - vi. Frequency = Every 30 Minutes

The screenshot shows the 'Workflow' configuration window. At the top, there are buttons for 'Save', 'Cancel', 'Change ID', 'Execute now', and an 'Actions' dropdown. Below these is a 'Save & New' button. The main content area is divided into three sections: 'Basic Information', 'Initiation', and 'Schedule'. In the 'Basic Information' section, the 'NAME' is 'Update "Date last fulfilled"', the 'ID' is 'customworkflow73', the 'RECORD TYPE' is 'Item', and the 'SUB TYPES' list includes 'Description Item', 'Discount Item', 'Inventory Part' (which is selected), 'Item Group', and 'Kit Item'. The 'DESCRIPTION' field is empty. The 'OWNER' is 'E102 Cory S Anderson'. There are checkboxes for 'EXECUTE AS ADMIN', 'ENABLE LOGGING', and 'INACTIVE', all of which are currently unchecked. The 'RELEASE STATUS' is set to 'Released'. In the 'Initiation' section, 'EVENT BASED' is selected with a radio button, and 'SCHEDULED' is also selected with a radio button. In the 'Schedule' section, the 'SAVED SEARCH' is 'Date last fulfilled search'. The 'REPEAT' checkbox is checked. The 'FREQUENCY' is 'Every 30 minutes'. The 'SCHEDULED FROM DATE' is '9/6/2013', and the 'SCHEDULED UNTIL DATE' is empty. At the bottom, there are tabs for 'Fields' and 'History', and a red 'X' icon in the bottom right corner.

- b. In the State 1 that is automatically created for the Workflow you just need one Action
 - i. Click on the State 1 box
 - ii. Then New Action (bottom right of screen)
 - iii. Trigger On = Entry
 - iv. Field = Date last fulfilled
 - v. Value = Date

1. Then choose 'today' from the drop down menu

Parameters

* FIELD: Date last fulfilled

Value

STATIC VALUE ☐

TEXT

CHECKED ☐

SELECTION

DATE ☒

today

FROM FIELD ☐

RECORD: Current Record

FIELD

FORMULA ☐

FORMULA

Save Cancel Make Copy Change ID Actions

2. Screenshot is the bottom part of the New Action window

- c. If you want you can also add an email action that emails you whenever this workflow triggers. I use this to test and verify workflows.
- d. To test, go back to the main setup window for this Workflow
 - i. Set Release Status to Testing – then Save
 - ii. Then go back in to the same window and hit Execute Now. This will execute the workflow on the first 20 records in the Saved Search.
- e. When testing is complete, set the Release Status to Released

Workflow

Save Cancel Change ID Execute now

Basic Information

* NAME: Update "Date last fulfilled"

ID: customworkflow73

RECORD TYPE: Item

* SUB TYPES: Description Item, Discount Item, Inventory Part, Item Group, Kit Item

DESCRIPTION:

OWNER: E102 Cory S Anderson

EXECUTE AS ADMIN: ☐

RELEASE STATUS: Testing

ENABLE LOGGING: ☐

INACTIVE: ☐

Initiation

EVENT BASED ☐ SCHEDULED ☒

Schedule

* SAVED SEARCH: Date last fulfilled search

REPEAT: ☒

FREQUENCY: Every 30 minutes

* SCHEDULED FROM DATE: 9/6/2013

SCHEDULED UNTIL DATE:

Fields History