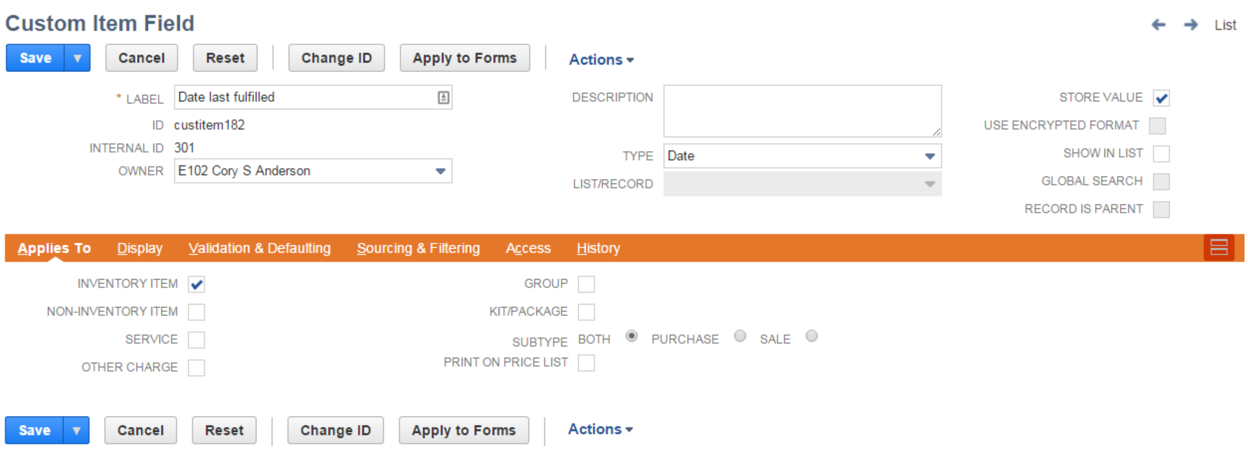
RMNSUG
ROCKY MOUNTAIN NETSUITE USER GROUP

7/22/2015 - Tips and Tricks

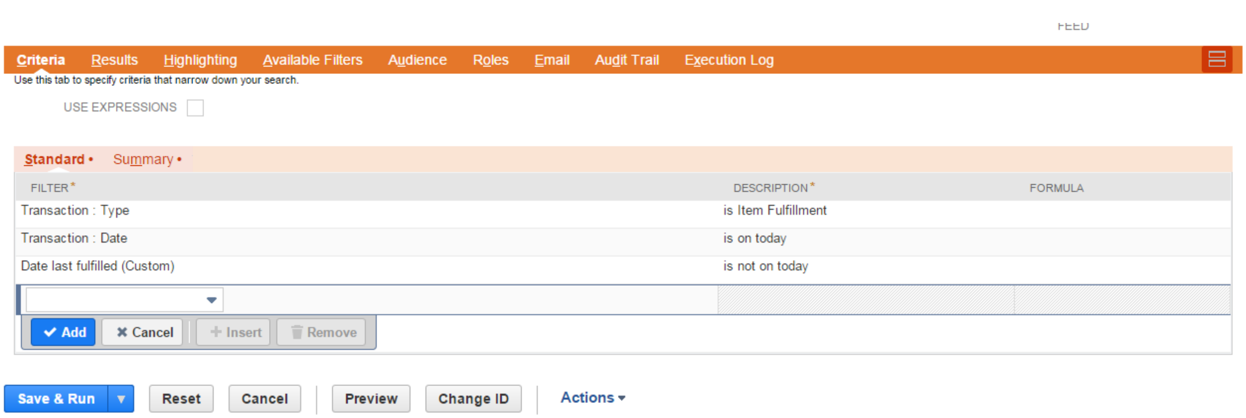
<u>Date Last Fulfilled</u>

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.

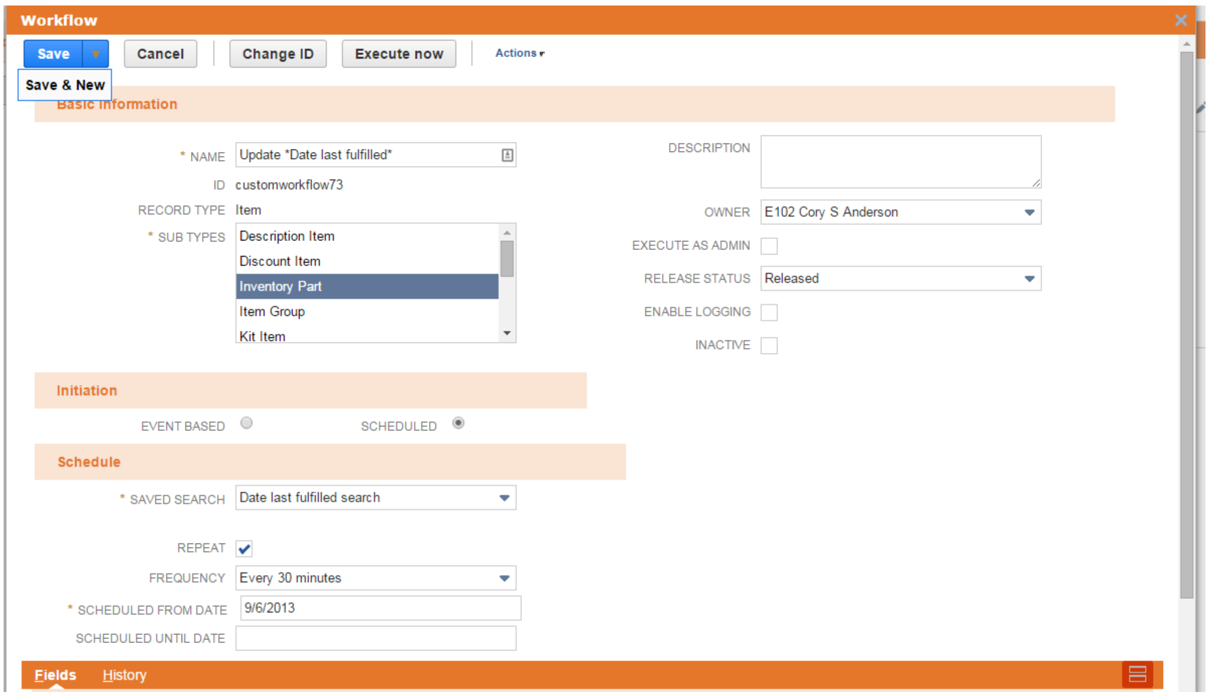
1. Create a custom field on the Item Record with a type of Date.
    a. On the Display tab choose where you want the field displayed on your Item Record form



2. Next create a Saved Search to return the items that have been fulfilled today
    a. New Saved Item Search
        i. Criteria:
            1. Transacton: 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

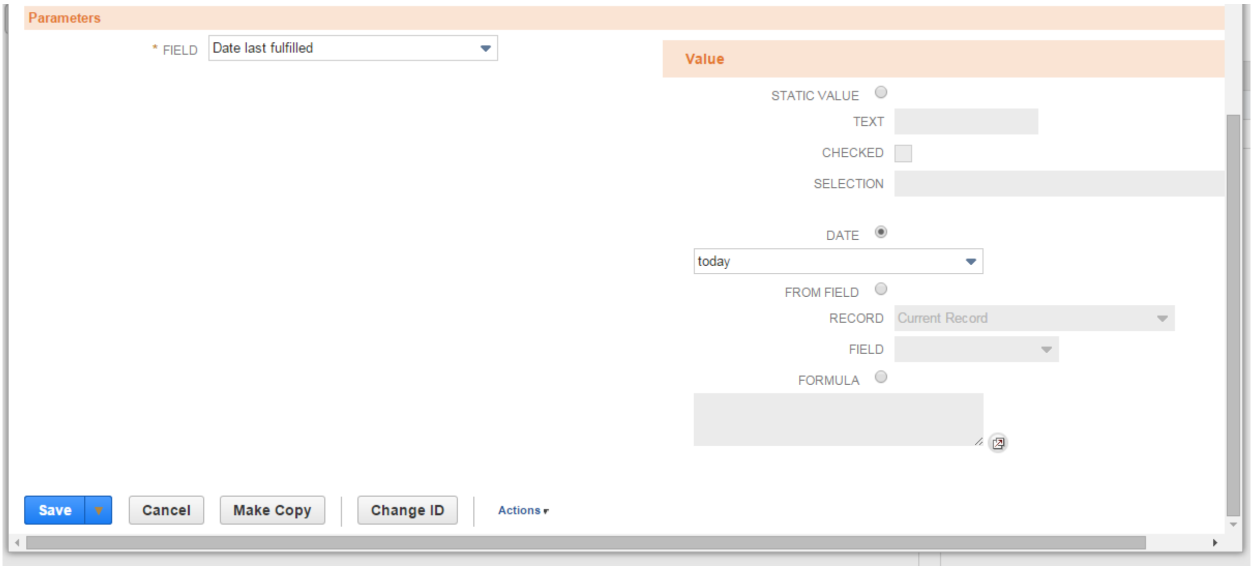


3. Next create the Workflow to update the field Date Last Fulfilled
    a. Create a new Workflow with the following parameters:
        i. Record Type = Item
        ii. Sub Type = Inventory Part
        iii. Initiation = Scheduled
        iv. Saved Search = Date last fulfilled search (or whatever you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



    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



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