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DOCUMENTATION LIBRARY

CSDocs Demo

Reference documentation generated from the latest NetSuite source snapshot for review, support, and change planning.

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Jun 9, 2026, 11:34 AM (EST)	**970 documents**	**10 sections**

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SECTION

Projects

Grouped automation and configuration areas with their connected components.

61 documents

Projects contents

Grouped automation and configuration areas with their connected components.

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Backorder Review Queue

Source: `Projects/backorder-review-queue`

Backorder Review Queue groups 27 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 27 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how backorder review queue behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Backorder Review Queue Review Search 141	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 41	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 315	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 263	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 311	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 62	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 12	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 195	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 170	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 100	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 113	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 202	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 1	Saved Search	Surfaces records that need review for backorder review queue.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Backorder Review Queue Review Search 161	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 40	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 38	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 183	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 145	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 174	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 47	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 81	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 122	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 177	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 116	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 46	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 312	Saved Search	Surfaces records that need review for backorder review queue.
Backorder Review Queue Review Search 53	Saved Search	Surfaces records that need review for backorder review queue.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Billing Schedule Monitor

Source: `Projects/billing-schedule-monitor`

Billing Schedule Monitor groups 25 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 25 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how billing schedule monitor behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Billing Schedule Monitor Review Search 109	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 294	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 252	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 287	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 213	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 106	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 13	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 52	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 196	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 175	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 274	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 130	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 276	Saved Search	Surfaces records that need review for billing schedule monitor.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Billing Schedule Monitor Review Search 144	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 282	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 237	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 107	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 180	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 149	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 250	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 142	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 119	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 126	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 121	Saved Search	Surfaces records that need review for billing schedule monitor.
Billing Schedule Monitor Review Search 14	Saved Search	Surfaces records that need review for billing schedule monitor.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Campaign Response Routing

Source: `Projects/campaign-response-routing`

Campaign Response Routing groups 23 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 23 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how campaign response routing behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Campaign Response Routing Review Search 164	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 303	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 45	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 96	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 313	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 21	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 82	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 24	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 146	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 152	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 298	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 275	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 159	Saved Search	Surfaces records that need review for campaign response routing.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Campaign Response Routing Review Search 117	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 75	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 89	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 269	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 278	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 143	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 58	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 293	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 3	Saved Search	Surfaces records that need review for campaign response routing.
Campaign Response Routing Review Search 9	Saved Search	Surfaces records that need review for campaign response routing.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Case Escalation Management

Source: `Projects/case-escalation-management`

Case Escalation Management groups 22 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 22 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how case escalation management behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Case Escalation Management Review Search 90	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 297	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 133	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 110	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 179	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 64	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 129	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 203	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 190	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 16	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 36	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 29	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 296	Saved Search	Surfaces records that need review for case escalation management.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Case Escalation Management Review Search 91	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 59	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 199	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 209	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 79	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 197	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 136	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 37	Saved Search	Surfaces records that need review for case escalation management.
Case Escalation Management Review Search 18	Saved Search	Surfaces records that need review for case escalation management.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Case Follow-up Reminder

Source: `Projects/case-follow-up-reminder`

Case Follow-up Reminder groups 21 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 21 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how case follow-up reminder behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Case Follow-up Reminder Review Search 244	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 151	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 148	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 32	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 111	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 158	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 172	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 31	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 253	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 302	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 128	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 163	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 17	Saved Search	Surfaces records that need review for case follow-up reminder.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Case Follow-up Reminder Review Search 166	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 268	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 86	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 300	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 25	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 181	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 131	Saved Search	Surfaces records that need review for case follow-up reminder.
Case Follow-up Reminder Review Search 259	Saved Search	Surfaces records that need review for case follow-up reminder.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Cash Sale Exception Review

Source: `Projects/cash-sale-exception-review`

Cash Sale Exception Review groups 20 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 20 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how cash sale exception review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Cash Sale Exception Review Review Search 87	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 284	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 50	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 6	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 220	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 124	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 112	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 301	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 205	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 173	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 55	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 132	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 267	Saved Search	Surfaces records that need review for cash sale exception review.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Cash Sale Exception Review Review Search 43	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 139	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 281	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 2	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 304	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 230	Saved Search	Surfaces records that need review for cash sale exception review.
Cash Sale Exception Review Review Search 210	Saved Search	Surfaces records that need review for cash sale exception review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Commission Eligibility Flags

Source: `Projects/commission-eligibility-flags`

Commission Eligibility Flags groups 19 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 19 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how commission eligibility flags behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Commission Eligibility Flags Review Search 241	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 201	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 240	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 229	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 73	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 169	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 239	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 225	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 8	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 200	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 309	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 147	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 69	Saved Search	Surfaces records that need review for commission eligibility flags.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Commission Eligibility Flags Review Search 51	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 246	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 99	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 137	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 134	Saved Search	Surfaces records that need review for commission eligibility flags.
Commission Eligibility Flags Review Search 74	Saved Search	Surfaces records that need review for commission eligibility flags.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Contract Renewal Alerts

Source: `Projects/contract-renewal-alerts`

Contract Renewal Alerts groups 18 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 18 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how contract renewal alerts behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Contract Renewal Alerts Review Search 104	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 248	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 261	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 258	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 156	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 243	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 54	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 20	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 289	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 160	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 23	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 228	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 233	Saved Search	Surfaces records that need review for contract renewal alerts.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Contract Renewal Alerts Review Search 84	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 307	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 285	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 157	Saved Search	Surfaces records that need review for contract renewal alerts.
Contract Renewal Alerts Review Search 76	Saved Search	Surfaces records that need review for contract renewal alerts.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Credit Hold Review

Source: `Projects/credit-hold-review`

Credit Hold Review groups 17 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 17 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how credit hold review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Credit Hold Review Review Search 15	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 226	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 247	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 224	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 167	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 184	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 135	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 299	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 114	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 191	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 39	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 83	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 288	Saved Search	Surfaces records that need review for credit hold review.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Credit Hold Review Review Search 22	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 238	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 215	Saved Search	Surfaces records that need review for credit hold review.
Credit Hold Review Review Search 95	Saved Search	Surfaces records that need review for credit hold review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Customer Credit Recheck

Source: `Projects/customer-credit-recheck`

Customer Credit Recheck groups 16 related components across Saved Searches / Scripts. The configuration centers on saved searches and includes 15 scripts that support the process.

How the pieces work together

- This configuration has 16 documented components, with the strongest activity in Saved Searches, Scripts.
- Review the scripts and workflows first when changing how customer credit recheck behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Credit Recheck Review Search 214	Saved Search	Surfaces records that need review for customer credit recheck.
Customer Credit Recheck Suitelet	Suitelet	Runs automation logic for customer credit recheck.
Customer Credit Recheck Client	Client Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck Client	Client Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck Workflow Action	Workflow Action Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck Scheduled	Scheduled Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck Client	Client Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck Map Reduce	Map/Reduce Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck User Event	User Event Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck User Event	User Event Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck Bundle Installation	Bundle Installation Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck User Event	User Event Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck Portlet	Portlet Script	Runs automation logic for customer credit recheck.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Credit Recheck Map Reduce	Map/Reduce Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck User Event	User Event Script	Runs automation logic for customer credit recheck.
Customer Credit Recheck User Event	User Event Script	Runs automation logic for customer credit recheck.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Customer Deposit Matching

Source: `Projects/customer-deposit-matching`

Customer Deposit Matching groups 15 related components across Scripts. The configuration centers on scripts and includes 15 scripts that support the process.

How the pieces work together

- This configuration has 15 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how customer deposit matching behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Deposit Matching Scheduled	Scheduled Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching Client	Client Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching User Event	User Event Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching Map Reduce	Map/Reduce Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching Portlet	Portlet Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching Workflow Action	Workflow Action Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching RESTlet	RESTlet	Runs automation logic for customer deposit matching.
Customer Deposit Matching User Event	User Event Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching User Event	User Event Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching Client	Client Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching Map Reduce	Map/Reduce Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching RESTlet	RESTlet	Runs automation logic for customer deposit matching.
Customer Deposit Matching Portlet	Portlet Script	Runs automation logic for customer deposit matching.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Deposit Matching Client	Client Script	Runs automation logic for customer deposit matching.
Customer Deposit Matching Client	Client Script	Runs automation logic for customer deposit matching.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Customer Duplicate Review

Source: `Projects/customer-duplicate-review`

Customer Duplicate Review groups 14 related components across Scripts. The configuration centers on scripts and includes 14 scripts that support the process.

How the pieces work together

- This configuration has 14 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how customer duplicate review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Duplicate Review Scheduled	Scheduled Script	Runs automation logic for customer duplicate review.
Customer Duplicate Review Suitelet	Suitelet	Runs automation logic for customer duplicate review.
Customer Duplicate Review RESTlet	RESTlet	Runs automation logic for customer duplicate review.
Customer Duplicate Review User Event	User Event Script	Runs automation logic for customer duplicate review.
Customer Duplicate Review User Event	User Event Script	Runs automation logic for customer duplicate review.
Customer Duplicate Review Client	Client Script	Runs automation logic for customer duplicate review.
Customer Duplicate Review User Event	User Event Script	Runs automation logic for customer duplicate review.
Customer Duplicate Review RESTlet	RESTlet	Runs automation logic for customer duplicate review.
Customer Duplicate Review User Event	User Event Script	Runs automation logic for customer duplicate review.
Customer Duplicate Review User Event	User Event Script	Runs automation logic for customer duplicate review.
Customer Duplicate Review Suitelet	Suitelet	Runs automation logic for customer duplicate review.
Customer Duplicate Review Suitelet	Suitelet	Runs automation logic for customer duplicate review.
Customer Duplicate Review Suitelet	Suitelet	Runs automation logic for customer duplicate review.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Duplicate Review Client	Client Script	Runs automation logic for customer duplicate review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Customer Onboarding Controls

Source: `Projects/customer-onboarding-controls`

Customer Onboarding Controls groups 98 related components across Custom Fields. The configuration centers on custom fields and includes configuration records that support the process.

How the pieces work together

- This configuration has 98 documented components, with the strongest activity in Custom Fields.
- Review the scripts and workflows first when changing how customer onboarding controls behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Onboarding Controls Hold Reason	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Other Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Hold Reason	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Item Number Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Item Number Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Item Option Custom Field	Stores values used by customer onboarding controls.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Onboarding Controls Approval Level	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Hold Reason	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Item Number Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Hold Reason	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Column Custom Field	Stores values used by customer onboarding controls.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Onboarding Controls Review Date	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Item Number Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	CRM Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Item Option Custom Field	Stores values used by customer onboarding controls.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Onboarding Controls Routing Group	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Hold Reason	CRM Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Hold Reason	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	CRM Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	CRM Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Entity Custom Field	Stores values used by customer onboarding controls.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Onboarding Controls Exception Flag	Other Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Hold Reason	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Entity Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Priority	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Status	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Transaction Column Custom Field	Stores values used by customer onboarding controls.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Onboarding Controls Review Date	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Exception Flag	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Other Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Hold Reason	Item Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Routing Group	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Owner	Transaction Body Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Review Date	Transaction Column Custom Field	Stores values used by customer onboarding controls.
Customer Onboarding Controls Approval Level	Entity Custom Field	Stores values used by customer onboarding controls.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Customer Tier Management

Source: `Projects/customer-tier-management`

Customer Tier Management groups 13 related components across Scripts. The configuration centers on scripts and includes 13 scripts that support the process.

How the pieces work together

- This configuration has 13 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how customer tier management behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Customer Tier Management Client	Client Script	Runs automation logic for customer tier management.
Customer Tier Management User Event	User Event Script	Runs automation logic for customer tier management.
Customer Tier Management RESTlet	RESTlet	Runs automation logic for customer tier management.
Customer Tier Management User Event	User Event Script	Runs automation logic for customer tier management.
Customer Tier Management User Event	User Event Script	Runs automation logic for customer tier management.
Customer Tier Management Map Reduce	Map/Reduce Script	Runs automation logic for customer tier management.
Customer Tier Management Map Reduce	Map/Reduce Script	Runs automation logic for customer tier management.
Customer Tier Management Client	Client Script	Runs automation logic for customer tier management.
Customer Tier Management Map Reduce	Map/Reduce Script	Runs automation logic for customer tier management.
Customer Tier Management RESTlet	RESTlet	Runs automation logic for customer tier management.
Customer Tier Management Workflow Action	Workflow Action Script	Runs automation logic for customer tier management.
Customer Tier Management Portlet	Portlet Script	Runs automation logic for customer tier management.
Customer Tier Management Suitelet	Suitelet	Runs automation logic for customer tier management.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Demo Core Utilities

Source: `Projects/demo-core-utilities`

Demo Core Utilities groups 13 related components across Scripts. The configuration centers on scripts and includes 13 scripts that support the process.

How the pieces work together

- This configuration has 13 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how demo core utilities behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Demo Core Utilities Client	Client Script	Runs automation logic for demo core utilities.
Demo Core Utilities Suitelet	Suitelet	Runs automation logic for demo core utilities.
Demo Core Utilities User Event	User Event Script	Runs automation logic for demo core utilities.
Demo Core Utilities Scheduled	Scheduled Script	Runs automation logic for demo core utilities.
Demo Core Utilities Workflow Action	Workflow Action Script	Runs automation logic for demo core utilities.
Demo Core Utilities Suitelet	Suitelet	Runs automation logic for demo core utilities.
Demo Core Utilities User Event	User Event Script	Runs automation logic for demo core utilities.
Demo Core Utilities Map Reduce	Map/Reduce Script	Runs automation logic for demo core utilities.
Demo Core Utilities Scheduled	Scheduled Script	Runs automation logic for demo core utilities.
Demo Core Utilities Map Reduce	Map/Reduce Script	Runs automation logic for demo core utilities.
Demo Core Utilities Scheduled	Scheduled Script	Runs automation logic for demo core utilities.
Demo Core Utilities Map Reduce	Map/Reduce Script	Runs automation logic for demo core utilities.
Demo Core Utilities Client	Client Script	Runs automation logic for demo core utilities.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Drop Ship Coordination

Source: `Projects/drop-ship-coordination`

Drop Ship Coordination groups 12 related components across Scripts. The configuration centers on scripts and includes 12 scripts that support the process.

How the pieces work together

- This configuration has 12 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how drop ship coordination behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Drop Ship Coordination Bundle Installation	Bundle Installation Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination Workflow Action	Workflow Action Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination Scheduled	Scheduled Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination RESTlet	RESTlet	Runs automation logic for drop ship coordination.
Drop Ship Coordination User Event	User Event Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination User Event	User Event Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination Scheduled	Scheduled Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination Client	Client Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination Workflow Action	Workflow Action Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination User Event	User Event Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination Client	Client Script	Runs automation logic for drop ship coordination.
Drop Ship Coordination Client	Client Script	Runs automation logic for drop ship coordination.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.

- Validate saved searches and fields after any workflow or script change.

Employee Approval Limits

Source: `Projects/employee-approval-limits`

Employee Approval Limits groups 12 related components across Scripts. The configuration centers on scripts and includes 12 scripts that support the process.

How the pieces work together

- This configuration has 12 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how employee approval limits behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Employee Approval Limits Map Reduce	Map/Reduce Script	Runs automation logic for employee approval limits.
Employee Approval Limits Map Reduce	Map/Reduce Script	Runs automation logic for employee approval limits.
Employee Approval Limits User Event	User Event Script	Runs automation logic for employee approval limits.
Employee Approval Limits Client	Client Script	Runs automation logic for employee approval limits.
Employee Approval Limits Suitelet	Suitelet	Runs automation logic for employee approval limits.
Employee Approval Limits User Event	User Event Script	Runs automation logic for employee approval limits.
Employee Approval Limits Client	Client Script	Runs automation logic for employee approval limits.
Employee Approval Limits Client	Client Script	Runs automation logic for employee approval limits.
Employee Approval Limits Client	Client Script	Runs automation logic for employee approval limits.
Employee Approval Limits Scheduled	Scheduled Script	Runs automation logic for employee approval limits.
Employee Approval Limits User Event	User Event Script	Runs automation logic for employee approval limits.
Employee Approval Limits Scheduled	Scheduled Script	Runs automation logic for employee approval limits.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.

- Validate saved searches and fields after any workflow or script change.

Expense Approval Routing

Source: `Projects/expense-approval-routing`

Expense Approval Routing groups 11 related components across Scripts. The configuration centers on scripts and includes 11 scripts that support the process.

How the pieces work together

- This configuration has 11 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how expense approval routing behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Expense Approval Routing Suitelet	Suitelet	Runs automation logic for expense approval routing.
Expense Approval Routing Map Reduce	Map/Reduce Script	Runs automation logic for expense approval routing.
Expense Approval Routing User Event	User Event Script	Runs automation logic for expense approval routing.
Expense Approval Routing Workflow Action	Workflow Action Script	Runs automation logic for expense approval routing.
Expense Approval Routing Scheduled	Scheduled Script	Runs automation logic for expense approval routing.
Expense Approval Routing Map Reduce	Map/Reduce Script	Runs automation logic for expense approval routing.
Expense Approval Routing Map Reduce	Map/Reduce Script	Runs automation logic for expense approval routing.
Expense Approval Routing Client	Client Script	Runs automation logic for expense approval routing.
Expense Approval Routing User Event	User Event Script	Runs automation logic for expense approval routing.
Expense Approval Routing Client	Client Script	Runs automation logic for expense approval routing.
Expense Approval Routing Client	Client Script	Runs automation logic for expense approval routing.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Forecast Adjustment Review

Source: `Projects/forecast-adjustment-review`

Forecast Adjustment Review groups 6 related components across Scripts. The configuration centers on scripts and includes 6 scripts that support the process.

How the pieces work together

- This configuration has 6 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how forecast adjustment review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Forecast Adjustment Review RESTlet	RESTlet	Runs automation logic for forecast adjustment review.
Forecast Adjustment Review User Event	User Event Script	Runs automation logic for forecast adjustment review.
Forecast Adjustment Review Suitelet	Suitelet	Runs automation logic for forecast adjustment review.
Forecast Adjustment Review Bundle Installation	Bundle Installation Script	Runs automation logic for forecast adjustment review.
Forecast Adjustment Review User Event	User Event Script	Runs automation logic for forecast adjustment review.
Forecast Adjustment Review Suitelet	Suitelet	Runs automation logic for forecast adjustment review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Fulfillment Hold Automation

Source: `Projects/fulfillment-hold-automation`

Fulfillment Hold Automation groups 6 related components across Scripts. The configuration centers on scripts and includes 6 scripts that support the process.

How the pieces work together

- This configuration has 6 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how fulfillment hold automation behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Fulfillment Hold Automation Map Reduce	Map/Reduce Script	Runs automation logic for fulfillment hold automation.
Fulfillment Hold Automation User Event	User Event Script	Runs automation logic for fulfillment hold automation.
Fulfillment Hold Automation Suitelet	Suitelet	Runs automation logic for fulfillment hold automation.
Fulfillment Hold Automation User Event	User Event Script	Runs automation logic for fulfillment hold automation.
Fulfillment Hold Automation Suitelet	Suitelet	Runs automation logic for fulfillment hold automation.
Fulfillment Hold Automation Bundle Installation	Bundle Installation Script	Runs automation logic for fulfillment hold automation.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Inventory Count Reconciliation

Source: `Projects/inventory-count-reconciliation`

Inventory Count Reconciliation groups 5 related components across Scripts. The configuration centers on scripts and includes 5 scripts that support the process.

How the pieces work together

- This configuration has 5 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how inventory count reconciliation behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Inventory Count Reconciliation Suitelet	Suitelet	Runs automation logic for inventory count reconciliation.
Inventory Count Reconciliation Scheduled	Scheduled Script	Runs automation logic for inventory count reconciliation.
Inventory Count Reconciliation Scheduled	Scheduled Script	Runs automation logic for inventory count reconciliation.
Inventory Count Reconciliation Map Reduce	Map/Reduce Script	Runs automation logic for inventory count reconciliation.
Inventory Count Reconciliation Client	Client Script	Runs automation logic for inventory count reconciliation.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Inventory Reorder Alerts

Source: `Projects/inventory-reorder-alerts`

Inventory Reorder Alerts groups 76 related components across Custom Fields. The configuration centers on custom fields and includes configuration records that support the process.

How the pieces work together

- This configuration has 76 documented components, with the strongest activity in Custom Fields.
- Review the scripts and workflows first when changing how inventory reorder alerts behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Inventory Reorder Alerts Approval Level	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Exception Flag	Item Number Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Review Date	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Review Date	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Hold Reason	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Exception Flag	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Transaction Body Custom Field	Stores values used by inventory reorder alerts.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Inventory Reorder Alerts Review Date	Item Option Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Hold Reason	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Hold Reason	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Priority	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Hold Reason	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Priority	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Priority	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Review Date	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Exception Flag	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Priority	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Priority	Transaction Body Custom Field	Stores values used by inventory reorder alerts.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Inventory Reorder Alerts Status	Item Option Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Review Date	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Review Date	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Priority	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Hold Reason	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Review Date	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Exception Flag	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Hold Reason	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Other Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Exception Flag	Item Option Custom Field	Stores values used by inventory reorder alerts.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Inventory Reorder Alerts Review Date	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Priority	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Item Number Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Hold Reason	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Priority	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Exception Flag	Entity Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Exception Flag	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Status	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	Transaction Body Custom Field	Stores values used by inventory reorder alerts.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Inventory Reorder Alerts Review Date	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Approval Level	Item Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Transaction Body Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Owner	CRM Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Review Date	Transaction Column Custom Field	Stores values used by inventory reorder alerts.
Inventory Reorder Alerts Routing Group	Transaction Column Custom Field	Stores values used by inventory reorder alerts.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Inventory Transfer Review

Source: `Projects/inventory-transfer-review`

Inventory Transfer Review groups 5 related components across Scripts. The configuration centers on scripts and includes 5 scripts that support the process.

How the pieces work together

- This configuration has 5 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how inventory transfer review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Inventory Transfer Review Scheduled	Scheduled Script	Runs automation logic for inventory transfer review.
Inventory Transfer Review User Event	User Event Script	Runs automation logic for inventory transfer review.
Inventory Transfer Review Client	Client Script	Runs automation logic for inventory transfer review.
Inventory Transfer Review RESTlet	RESTlet	Runs automation logic for inventory transfer review.
Inventory Transfer Review Client	Client Script	Runs automation logic for inventory transfer review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Invoice Delivery Preferences

Source: `Projects/invoice-delivery-preferences`

Invoice Delivery Preferences groups 5 related components across Scripts. The configuration centers on scripts and includes 5 scripts that support the process.

How the pieces work together

- This configuration has 5 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how invoice delivery preferences behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Invoice Delivery Preferences Map Reduce	Map/Reduce Script	Runs automation logic for invoice delivery preferences.
Invoice Delivery Preferences Map Reduce	Map/Reduce Script	Runs automation logic for invoice delivery preferences.
Invoice Delivery Preferences Scheduled	Scheduled Script	Runs automation logic for invoice delivery preferences.
Invoice Delivery Preferences Scheduled	Scheduled Script	Runs automation logic for invoice delivery preferences.
Invoice Delivery Preferences Suitelet	Suitelet	Runs automation logic for invoice delivery preferences.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Invoice Queue Automation

Source: `Projects/invoice-queue-automation`

Invoice Queue Automation groups 62 related components across Custom Fields. The configuration centers on custom fields and includes configuration records that support the process.

How the pieces work together

- This configuration has 62 documented components, with the strongest activity in Custom Fields.
- Review the scripts and workflows first when changing how invoice queue automation behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Invoice Queue Automation Routing Group	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Item Option Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Review Date	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Routing Group	CRM Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	CRM Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Status	Item Number Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Status	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Owner	CRM Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Status	Transaction Body Custom Field	Stores values used by invoice queue automation.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Invoice Queue Automation Owner	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Approval Level	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Routing Group	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Review Date	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Owner	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Status	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Review Date	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Routing Group	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Review Date	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Priority	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Priority	Other Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Owner	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Priority	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Routing Group	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Priority	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Approval Level	Item Custom Field	Stores values used by invoice queue automation.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Invoice Queue Automation Priority	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Priority	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Item Number Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Other Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Review Date	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Routing Group	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Review Date	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Review Date	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Approval Level	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Owner	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Status	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Approval Level	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Owner	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Review Date	Transaction Body Custom Field	Stores values used by invoice queue automation.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Invoice Queue Automation Hold Reason	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Routing Group	Item Option Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Status	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Priority	Entity Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Exception Flag	Item Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Transaction Body Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Routing Group	CRM Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Transaction Column Custom Field	Stores values used by invoice queue automation.
Invoice Queue Automation Hold Reason	Transaction Column Custom Field	Stores values used by invoice queue automation.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Item Fulfillment Controls

Source: `Projects/item-fulfillment-controls`

Item Fulfillment Controls groups 5 related components across Scripts. The configuration centers on scripts and includes 5 scripts that support the process.

How the pieces work together

- This configuration has 5 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how item fulfillment controls behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Item Fulfillment Controls Scheduled	Scheduled Script	Runs automation logic for item fulfillment controls.
Item Fulfillment Controls Suitelet	Suitelet	Runs automation logic for item fulfillment controls.
Item Fulfillment Controls Map Reduce	Map/Reduce Script	Runs automation logic for item fulfillment controls.
Item Fulfillment Controls Suitelet	Suitelet	Runs automation logic for item fulfillment controls.
Item Fulfillment Controls Map Reduce	Map/Reduce Script	Runs automation logic for item fulfillment controls.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Item Fulfillment Labeling

Source: `Projects/item-fulfillment-labeling`

Item Fulfillment Labeling groups 4 related components across Scripts. The configuration centers on scripts and includes 4 scripts that support the process.

How the pieces work together

- This configuration has 4 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how item fulfillment labeling behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Item Fulfillment Labeling Workflow Action	Workflow Action Script	Runs automation logic for item fulfillment labeling.
Item Fulfillment Labeling User Event	User Event Script	Runs automation logic for item fulfillment labeling.
Item Fulfillment Labeling Scheduled	Scheduled Script	Runs automation logic for item fulfillment labeling.
Item Fulfillment Labeling Portlet	Portlet Script	Runs automation logic for item fulfillment labeling.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Item Margin Guardrails

Source: `Projects/item-margin-guardrails`

Item Margin Guardrails groups 4 related components across Scripts. The configuration centers on scripts and includes 4 scripts that support the process.

How the pieces work together

- This configuration has 4 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how item margin guardrails behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Item Margin Guardrails User Event	User Event Script	Runs automation logic for item margin guardrails.
Item Margin Guardrails User Event	User Event Script	Runs automation logic for item margin guardrails.
Item Margin Guardrails Client	Client Script	Runs automation logic for item margin guardrails.
Item Margin Guardrails Workflow Action	Workflow Action Script	Runs automation logic for item margin guardrails.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Item Master Governance

Source: `Projects/item-master-governance`

Item Master Governance groups 4 related components across Scripts. The configuration centers on scripts and includes 4 scripts that support the process.

How the pieces work together

- This configuration has 4 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how item master governance behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Item Master Governance User Event	User Event Script	Runs automation logic for item master governance.
Item Master Governance Client	Client Script	Runs automation logic for item master governance.
Item Master Governance Scheduled	Scheduled Script	Runs automation logic for item master governance.
Item Master Governance Scheduled	Scheduled Script	Runs automation logic for item master governance.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Journal Approval Controls

Source: `Projects/journal-approval-controls`

Journal Approval Controls groups 4 related components across Scripts. The configuration centers on scripts and includes 4 scripts that support the process.

How the pieces work together

- This configuration has 4 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how journal approval controls behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Journal Approval Controls RESTlet	RESTlet	Runs automation logic for journal approval controls.
Journal Approval Controls User Event	User Event Script	Runs automation logic for journal approval controls.
Journal Approval Controls User Event	User Event Script	Runs automation logic for journal approval controls.
Journal Approval Controls Client	Client Script	Runs automation logic for journal approval controls.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Order Approval Workflow

Source: `Projects/order-approval-workflow`

Order Approval Workflow groups 51 related components across Custom Fields / Custom Lists. The configuration centers on custom fields and includes configuration records that support the process.

How the pieces work together

- This configuration has 51 documented components, with the strongest activity in Custom Fields, Custom Lists.
- Review the scripts and workflows first when changing how order approval workflow behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Order Approval Workflow Hold Reason	Transaction Column Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Status	Other Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Hold Reason	Transaction Column Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Hold Reason	Transaction Body Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Approval Level	Transaction Column Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Owner	Item Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Priority	Item Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Exception Flag	Transaction Body Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Review Date	Transaction Body Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Priority	Transaction Column Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Hold Reason	Transaction Body Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Owner	Entity Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Hold Reason	Transaction Body Custom Field	Stores values used by order approval workflow.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Order Approval Workflow Review Date	Transaction Body Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Approval Level	Item Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Approval Level	Transaction Body Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Hold Reason	Transaction Column Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Routing Group	Entity Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Status	Transaction Column Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Priority	Transaction Column Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Approval Level	Item Option Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Status	Entity Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Hold Reason	Item Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Priority	Transaction Body Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Review Date	Item Custom Field	Stores values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.
Order Approval Workflow Status List	Custom List	Defines selectable values used by order approval workflow.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Order Change Audit

Source: `Projects/order-change-audit`

Order Change Audit groups 4 related components across Scripts. The configuration centers on scripts and includes 4 scripts that support the process.

How the pieces work together

- This configuration has 4 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how order change audit behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Order Change Audit Suitelet	Suitelet	Runs automation logic for order change audit.
Order Change Audit Map Reduce	Map/Reduce Script	Runs automation logic for order change audit.
Order Change Audit Map Reduce	Map/Reduce Script	Runs automation logic for order change audit.
Order Change Audit RESTlet	RESTlet	Runs automation logic for order change audit.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Partner Referral Tracking

Source: `Projects/partner-referral-tracking`

Partner Referral Tracking groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how partner referral tracking behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Partner Referral Tracking Portlet	Portlet Script	Runs automation logic for partner referral tracking.
Partner Referral Tracking Workflow Action	Workflow Action Script	Runs automation logic for partner referral tracking.
Partner Referral Tracking Workflow Action	Workflow Action Script	Runs automation logic for partner referral tracking.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Payment Application Review

Source: `Projects/payment-application-review`

Payment Application Review groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how payment application review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Payment Application Review Suitelet	Suitelet	Runs automation logic for payment application review.
Payment Application Review Client	Client Script	Runs automation logic for payment application review.
Payment Application Review Client	Client Script	Runs automation logic for payment application review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Price Level Governance

Source: `Projects/price-level-governance`

Price Level Governance groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how price level governance behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Price Level Governance RESTlet	RESTlet	Runs automation logic for price level governance.
Price Level Governance Suitelet	Suitelet	Runs automation logic for price level governance.
Price Level Governance RESTlet	RESTlet	Runs automation logic for price level governance.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Pricing Review Process

Source: `Projects/pricing-review-process`

Pricing Review Process groups 43 related components across Custom Lists / Custom Records / Custom Segments / Custom Transaction Types. The configuration centers on custom lists and includes configuration records that support the process.

How the pieces work together

- This configuration has 43 documented components, with the strongest activity in Custom Lists, Custom Records, Custom Segments.
- Review the scripts and workflows first when changing how pricing review process behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Pricing Review Process Status List	Custom List	Defines selectable values used by pricing review process.
Approval Matrix	Custom Record Type	Stores setup data used by pricing review process.
Processing Queue	Custom Record Type	Stores setup data used by pricing review process.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Demo Region	Custom Segment	Supports pricing review process.
Demo Channel	Custom Segment	Supports pricing review process.
Demo Adjustment	Custom Transaction Type	Supports pricing review process.
Demo Request	Custom Transaction Type	Supports pricing review process.
Pricing Review Process Review Search 150	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 42	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 242	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 34	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 221	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 123	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 254	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 227	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 187	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 182	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 194	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 155	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 60	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 65	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 35	Saved Search	Surfaces records that need review for pricing review process.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Pricing Review Process Review Search 186	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 125	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 61	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 68	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 66	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 168	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 7	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 5	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 154	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 77	Saved Search	Surfaces records that need review for pricing review process.
Pricing Review Process Review Search 85	Saved Search	Surfaces records that need review for pricing review process.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Project Billing Review

Source: `Projects/project-billing-review`

Project Billing Review groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how project billing review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Project Billing Review Workflow Action	Workflow Action Script	Runs automation logic for project billing review.
Project Billing Review Map Reduce	Map/Reduce Script	Runs automation logic for project billing review.
Project Billing Review RESTlet	RESTlet	Runs automation logic for project billing review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Project Task Assignment

Source: `Projects/project-task-assignment`

Project Task Assignment groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how project task assignment behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Project Task Assignment User Event	User Event Script	Runs automation logic for project task assignment.
Project Task Assignment Scheduled	Scheduled Script	Runs automation logic for project task assignment.
Project Task Assignment User Event	User Event Script	Runs automation logic for project task assignment.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Purchase Order Closeout

Source: `Projects/purchase-order-closeout`

Purchase Order Closeout groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how purchase order closeout behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Purchase Order Closeout RESTlet	RESTlet	Runs automation logic for purchase order closeout.
Purchase Order Closeout Map Reduce	Map/Reduce Script	Runs automation logic for purchase order closeout.
Purchase Order Closeout RESTlet	RESTlet	Runs automation logic for purchase order closeout.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Purchase Price Variance Review

Source: `Projects/purchase-price-variance-review`

Purchase Price Variance Review groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how purchase price variance review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Purchase Price Variance Review Client	Client Script	Runs automation logic for purchase price variance review.
Purchase Price Variance Review Workflow Action	Workflow Action Script	Runs automation logic for purchase price variance review.
Purchase Price Variance Review RESTlet	RESTlet	Runs automation logic for purchase price variance review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Purchase Request Approval

Source: `Projects/purchase-request-approval`

Purchase Request Approval groups 37 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 37 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how purchase request approval behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Purchase Request Approval Review Search 4	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 222	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 28	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 33	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 245	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 72	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 118	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 103	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 232	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 236	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 94	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 305	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 11	Saved Search	Surfaces records that need review for purchase request approval.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Purchase Request Approval Review Search 283	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 88	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 178	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 127	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 270	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 27	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 70	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 235	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 208	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 30	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 217	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 97	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 57	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 188	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 140	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 98	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 264	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 44	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 171	Saved Search	Surfaces records that need review for purchase request approval.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Purchase Request Approval Review Search 138	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 306	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 316	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 231	Saved Search	Surfaces records that need review for purchase request approval.
Purchase Request Approval Review Search 92	Saved Search	Surfaces records that need review for purchase request approval.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Quote Approval Matrix

Source: `Projects/quote-approval-matrix`

Quote Approval Matrix groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how quote approval matrix behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Quote Approval Matrix Suitelet	Suitelet	Runs automation logic for quote approval matrix.
Quote Approval Matrix Map Reduce	Map/Reduce Script	Runs automation logic for quote approval matrix.
Quote Approval Matrix Map Reduce	Map/Reduce Script	Runs automation logic for quote approval matrix.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Quote Expiration Monitoring

Source: `Projects/quote-expiration-monitoring`

Quote Expiration Monitoring groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how quote expiration monitoring behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Quote Expiration Monitoring Map Reduce	Map/Reduce Script	Runs automation logic for quote expiration monitoring.
Quote Expiration Monitoring Workflow Action	Workflow Action Script	Runs automation logic for quote expiration monitoring.
Quote Expiration Monitoring Client	Client Script	Runs automation logic for quote expiration monitoring.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Renewal Opportunity Routing

Source: `Projects/renewal-opportunity-routing`

Renewal Opportunity Routing groups 3 related components across Scripts. The configuration centers on scripts and includes 3 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts.
- Review the scripts and workflows first when changing how renewal opportunity routing behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Renewal Opportunity Routing Client	Client Script	Runs automation logic for renewal opportunity routing.
Renewal Opportunity Routing User Event	User Event Script	Runs automation logic for renewal opportunity routing.
Renewal Opportunity Routing Client	Client Script	Runs automation logic for renewal opportunity routing.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Return Authorization Processing

Source: `Projects/return-authorization-processing`

Return Authorization Processing groups 3 related components across Scripts / Workflows. The configuration centers on scripts and includes 2 scripts that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Scripts, Workflows.
- Review the scripts and workflows first when changing how return authorization processing behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Return Authorization Processing Scheduled	Scheduled Script	Runs automation logic for return authorization processing.
Return Authorization Processing RESTlet	RESTlet	Runs automation logic for return authorization processing.
Return Authorization Processing Workflow	Workflow	Controls routing, status, or approval steps for return authorization processing.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Revenue Recognition Review

Source: `Projects/revenue-recognition-review`

Revenue Recognition Review groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how revenue recognition review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Revenue Recognition Review Workflow	Workflow	Controls routing, status, or approval steps for revenue recognition review.
Revenue Recognition Review Workflow	Workflow	Controls routing, status, or approval steps for revenue recognition review.
Revenue Recognition Review Workflow	Workflow	Controls routing, status, or approval steps for revenue recognition review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Sales Order Risk Review

Source: `Projects/sales-order-risk-review`

Sales Order Risk Review groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how sales order risk review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Sales Order Risk Review Workflow	Workflow	Controls routing, status, or approval steps for sales order risk review.
Sales Order Risk Review Workflow	Workflow	Controls routing, status, or approval steps for sales order risk review.
Sales Order Risk Review Workflow	Workflow	Controls routing, status, or approval steps for sales order risk review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Sales Rep Assignment Rules

Source: `Projects/sales-rep-assignment-rules`

Sales Rep Assignment Rules groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how sales rep assignment rules behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Sales Rep Assignment Rules Workflow	Workflow	Controls routing, status, or approval steps for sales rep assignment rules.
Sales Rep Assignment Rules Workflow	Workflow	Controls routing, status, or approval steps for sales rep assignment rules.
Sales Rep Assignment Rules Workflow	Workflow	Controls routing, status, or approval steps for sales rep assignment rules.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Sales Tax Exception Review

Source: `Projects/sales-tax-exception-review`

Sales Tax Exception Review groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how sales tax exception review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Sales Tax Exception Review Workflow	Workflow	Controls routing, status, or approval steps for sales tax exception review.
Sales Tax Exception Review Workflow	Workflow	Controls routing, status, or approval steps for sales tax exception review.
Sales Tax Exception Review Workflow	Workflow	Controls routing, status, or approval steps for sales tax exception review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Serialized Item Compliance

Source: `Projects/serialized-item-compliance`

Serialized Item Compliance groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how serialized item compliance behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Serialized Item Compliance Workflow	Workflow	Controls routing, status, or approval steps for serialized item compliance.
Serialized Item Compliance Workflow	Workflow	Controls routing, status, or approval steps for serialized item compliance.
Serialized Item Compliance Workflow	Workflow	Controls routing, status, or approval steps for serialized item compliance.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Service Case SLA Tracking

Source: `Projects/service-case-sla-tracking`

Service Case SLA Tracking groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how service case sla tracking behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Service Case SLA Tracking Workflow	Workflow	Controls routing, status, or approval steps for service case sla tracking.
Service Case SLA Tracking Workflow	Workflow	Controls routing, status, or approval steps for service case sla tracking.
Service Case SLA Tracking Workflow	Workflow	Controls routing, status, or approval steps for service case sla tracking.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Shipping Exception Alerts

Source: `Projects/shipping-exception-alerts`

Shipping Exception Alerts groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how shipping exception alerts behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Shipping Exception Alerts Workflow	Workflow	Controls routing, status, or approval steps for shipping exception alerts.
Shipping Exception Alerts Workflow	Workflow	Controls routing, status, or approval steps for shipping exception alerts.
Shipping Exception Alerts Workflow	Workflow	Controls routing, status, or approval steps for shipping exception alerts.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Shipping Method Validation

Source: `Projects/shipping-method-validation`

Shipping Method Validation groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how shipping method validation behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Shipping Method Validation Workflow	Workflow	Controls routing, status, or approval steps for shipping method validation.
Shipping Method Validation Workflow	Workflow	Controls routing, status, or approval steps for shipping method validation.
Shipping Method Validation Workflow	Workflow	Controls routing, status, or approval steps for shipping method validation.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Support Case Routing

Source: `Projects/support-case-routing`

Support Case Routing groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how support case routing behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Support Case Routing Workflow	Workflow	Controls routing, status, or approval steps for support case routing.
Support Case Routing Workflow	Workflow	Controls routing, status, or approval steps for support case routing.
Support Case Routing Workflow	Workflow	Controls routing, status, or approval steps for support case routing.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Support Intake Triage

Source: `Projects/support-intake-triage`

Support Intake Triage groups 32 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 32 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how support intake triage behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Support Intake Triage Review Search 78	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 93	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 279	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 211	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 193	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 153	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 292	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 49	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 56	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 120	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 256	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 272	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 105	Saved Search	Surfaces records that need review for support intake triage.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Support Intake Triage Review Search 189	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 204	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 218	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 192	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 249	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 265	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 26	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 219	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 271	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 102	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 277	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 63	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 216	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 115	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 67	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 207	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 19	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 223	Saved Search	Surfaces records that need review for support intake triage.
Support Intake Triage Review Search 260	Saved Search	Surfaces records that need review for support intake triage.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Tax Code Review

Source: `Projects/tax-code-review`

Tax Code Review groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how tax code review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Tax Code Review Workflow	Workflow	Controls routing, status, or approval steps for tax code review.
Tax Code Review Workflow	Workflow	Controls routing, status, or approval steps for tax code review.
Tax Code Review Workflow	Workflow	Controls routing, status, or approval steps for tax code review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Vendor Bill Exception Review

Source: `Projects/vendor-bill-exception-review`

Vendor Bill Exception Review groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how vendor bill exception review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Vendor Bill Exception Review Workflow	Workflow	Controls routing, status, or approval steps for vendor bill exception review.
Vendor Bill Exception Review Workflow	Workflow	Controls routing, status, or approval steps for vendor bill exception review.
Vendor Bill Exception Review Workflow	Workflow	Controls routing, status, or approval steps for vendor bill exception review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Vendor Compliance Checks

Source: `Projects/vendor-compliance-checks`

Vendor Compliance Checks groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how vendor compliance checks behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Vendor Compliance Checks Workflow	Workflow	Controls routing, status, or approval steps for vendor compliance checks.
Vendor Compliance Checks Workflow	Workflow	Controls routing, status, or approval steps for vendor compliance checks.
Vendor Compliance Checks Workflow	Workflow	Controls routing, status, or approval steps for vendor compliance checks.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Vendor Onboarding Review

Source: `Projects/vendor-onboarding-review`

Vendor Onboarding Review groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how vendor onboarding review behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Vendor Onboarding Review Workflow	Workflow	Controls routing, status, or approval steps for vendor onboarding review.
Vendor Onboarding Review Workflow	Workflow	Controls routing, status, or approval steps for vendor onboarding review.
Vendor Onboarding Review Workflow	Workflow	Controls routing, status, or approval steps for vendor onboarding review.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Vendor Payment Release

Source: `Projects/vendor-payment-release`

Vendor Payment Release groups 29 related components across Saved Searches. The configuration centers on saved searches and includes configuration records that support the process.

How the pieces work together

- This configuration has 29 documented components, with the strongest activity in Saved Searches.
- Review the scripts and workflows first when changing how vendor payment release behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Vendor Payment Release Review Search 71	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 295	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 291	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 266	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 290	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 212	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 108	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 273	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 280	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 317	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 10	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 234	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 257	Saved Search	Surfaces records that need review for vendor payment release.

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Vendor Payment Release Review Search 165	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 101	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 314	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 262	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 80	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 255	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 310	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 176	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 206	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 48	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 251	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 308	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 162	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 286	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 185	Saved Search	Surfaces records that need review for vendor payment release.
Vendor Payment Release Review Search 198	Saved Search	Surfaces records that need review for vendor payment release.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

Warehouse Transfer Controls

Source: `Projects/warehouse-transfer-controls`

Warehouse Transfer Controls groups 3 related components across Workflows. The configuration centers on workflows and includes configuration records that support the process.

How the pieces work together

- This configuration has 3 documented components, with the strongest activity in Workflows.
- Review the scripts and workflows first when changing how warehouse transfer controls behaves.
- Use the fields, lists, records, and searches as supporting configuration for the process.

Components

COMPONENT	TYPE	ROLE IN THIS CONFIGURATION
Warehouse Transfer Controls Workflow	Workflow	Controls routing, status, or approval steps for warehouse transfer controls.
Warehouse Transfer Controls Workflow	Workflow	Controls routing, status, or approval steps for warehouse transfer controls.
Warehouse Transfer Controls Workflow	Workflow	Controls routing, status, or approval steps for warehouse transfer controls.

What to review first

- Confirm the process owner understands the components listed above.
- Review scripts and workflows before changing supporting fields or searches.
- Validate saved searches and fields after any workflow or script change.

SECTION

Record types

Record-specific views showing projects and configuration tied to each NetSuite record type.

56 documents

Record types contents

Record-specific views showing projects and configuration tied to each NetSuite record type.

DOCUMENT	SOURCE
Account ↗	Record-Types/account
Assembly Build ↗	Record-Types/assembly-build
Assembly Item ↗	Record-Types/assembly-item
Billing Schedule ↗	Record-Types/billing-schedule
Bin ↗	Record-Types/bin
Calendar Event ↗	Record-Types/calendar-event
Campaign ↗	Record-Types/campaign
Cash Sale ↗	Record-Types/cash-sale
Class ↗	Record-Types/class
Contact ↗	Record-Types/contact
Credit Memo ↗	Record-Types/credit-memo
Customer ↗	Record-Types/customer
Customer Deposit ↗	Record-Types/customer-deposit
Customer Payment ↗	Record-Types/customer-payment
Department ↗	Record-Types/department
Employee ↗	Record-Types/employee
Estimate ↗	Record-Types/estimate
Expense Report ↗	Record-Types/expense-report
Inventory Adjustment ↗	Record-Types/inventory-adjustment
Inventory Item ↗	Record-Types/inventory-item
Inventory Transfer ↗	Record-Types/inventory-transfer
Invoice ↗	Record-Types/invoice
Item Fulfillment ↗	Record-Types/item-fulfillment
Item Receipt ↗	Record-Types/item-receipt
Journal Entry ↗	Record-Types/journal-entry
Kit Item ↗	Record-Types/kit-item
Lead ↗	Record-Types/lead

DOCUMENT	SOURCE
Location ↗	Record-Types/location
Lot Numbered Item ↗	Record-Types/lot-numbered-item
Non-inventory Item ↗	Record-Types/non-inventory-item
Opportunity ↗	Record-Types/opportunity
Partner ↗	Record-Types/partner
Payment Method ↗	Record-Types/payment-method
Phone Call ↗	Record-Types/phone-call
Price Level ↗	Record-Types/price-level
Project ↗	Record-Types/project
Prospect ↗	Record-Types/prospect
Purchase Order ↗	Record-Types/purchase-order
Purchase Requisition ↗	Record-Types/purchase-requisition
Return Authorization ↗	Record-Types/return-authorization
Sales Order ↗	Record-Types/sales-order
Sales Return ↗	Record-Types/sales-return
Sales Tax Item ↗	Record-Types/sales-tax-item
Serialized Inventory Item ↗	Record-Types/serialized-inventory-item
Service Item ↗	Record-Types/service-item
Shipping Item ↗	Record-Types/shipping-item
Subsidiary ↗	Record-Types/subsidiary
Support Case ↗	Record-Types/support-case
Task ↗	Record-Types/task
Term ↗	Record-Types/term
Transfer Order ↗	Record-Types/transfer-order
Vendor ↗	Record-Types/vendor
Vendor Bill ↗	Record-Types/vendor-bill
Vendor Payment ↗	Record-Types/vendor-payment
Vendor Return ↗	Record-Types/vendor-return
Work Order ↗	Record-Types/work-order

Account

Source: `Record-Types/account`

Projects**25**
Components**40**
Primary areas**Custom Fields / Scripts / Saved Searches**

Configuration summary

Account is connected to 25 detected configuration groups and 40 directly matched components. The largest groups include Vendor Bill Exception Review, Purchase Price Variance Review, Journal Approval Controls, Customer Deposit Matching.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Fields / Custom Lists	4
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Fields / Workflows	4
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Fields / Custom Lists	4
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Fields	3
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Vendor Bill Exception Review Routing Group	Transaction Body Custom Field	Vendor Bill Exception Review
Purchase Price Variance Review Hold Reason	Transaction Body Custom Field	Purchase Price Variance Review
Journal Approval Controls Owner	Transaction Body Custom Field	Journal Approval Controls

COMPONENT	TYPE	PROJECT
Customer Deposit Matching Approval Level	Transaction Body Custom Field	Customer Deposit Matching
Purchase Request Approval Routing Group	Transaction Body Custom Field	Purchase Request Approval
Customer Credit Recheck Owner	Transaction Column Custom Field	Customer Credit Recheck
Campaign Response Routing Approval Level	Transaction Column Custom Field	Campaign Response Routing
Vendor Payment Release Routing Group	Transaction Column Custom Field	Vendor Payment Release
Item Fulfillment Controls Hold Reason	Transaction Column Custom Field	Item Fulfillment Controls
Payment Application Review Exception Flag	Entity Custom Field	Payment Application Review
Invoice Delivery Preferences Review Date	Entity Custom Field	Invoice Delivery Preferences
Purchase Order Closeout Priority	Entity Custom Field	Purchase Order Closeout
Invoice Queue Automation Review Date	Item Custom Field	Invoice Queue Automation
Backorder Review Queue Priority	Item Custom Field	Backorder Review Queue
Sales Rep Assignment Rules Status	Item Custom Field	Sales Rep Assignment Rules
Customer Duplicate Review Priority	CRM Custom Field	Customer Duplicate Review
Item Fulfillment Labeling Status	CRM Custom Field	Item Fulfillment Labeling
Backorder Review Queue Status List	Custom List	Backorder Review Queue
Customer Deposit Matching Status List	Custom List	Customer Deposit Matching
Case Escalation Management Status List	Custom List	Case Escalation Management
Purchase Order Closeout Workflow	Workflow	Purchase Order Closeout
Inventory Transfer Review Review Search 45	Saved Search	Inventory Transfer Review
Customer Onboarding Controls Review Search 101	Saved Search	Customer Onboarding Controls
Purchase Request Approval Review Search 157	Saved Search	Purchase Request Approval
Quote Expiration Monitoring Review Search 213	Saved Search	Quote Expiration Monitoring
Tax Code Review Review Search 269	Saved Search	Tax Code Review

COMPONENT	TYPE	PROJECT
Backorder Review Queue Client	Client Script	Backorder Review Queue
Customer Duplicate Review Client	Client Script	Customer Duplicate Review
Sales Order Risk Review User Event	User Event Script	Sales Order Risk Review
Commission Eligibility Flags User Event	User Event Script	Commission Eligibility Flags
Purchase Order Closeout User Event	User Event Script	Purchase Order Closeout
Customer Deposit Matching User Event	User Event Script	Customer Deposit Matching
Case Escalation Management Map Reduce	Map/Reduce Script	Case Escalation Management
Price Level Governance Map Reduce	Map/Reduce Script	Price Level Governance
Backorder Review Queue Suitelet	Suitelet	Backorder Review Queue
Customer Duplicate Review Suitelet	Suitelet	Customer Duplicate Review
Sales Order Risk Review Workflow Action	Workflow Action Script	Sales Order Risk Review
Commission Eligibility Flags Workflow Action	Workflow Action Script	Commission Eligibility Flags
Purchase Order Closeout Portlet	Portlet Script	Purchase Order Closeout
Customer Deposit Matching Portlet	Portlet Script	Customer Deposit Matching

Assembly Build

Source: `Record-Types/assembly-build`

Projects**7**
Components**8**
Primary areas**Saved Searches / Scripts / Workflows**

Configuration summary

Assembly Build is connected to 7 detected configuration groups and 8 directly matched components. The largest groups include Vendor Bill Exception Review, Commission Eligibility Flags, Warehouse Transfer Controls, Partner Referral Tracking.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	2
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Warehouse Transfer Controls	This configuration coordinates warehouse transfer controls for Department records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Vendor Bill Exception Review Workflow	Workflow	Vendor Bill Exception Review
Commission Eligibility Flags Review Search 26	Saved Search	Commission Eligibility Flags
Warehouse Transfer Controls Review Search 82	Saved Search	Warehouse Transfer Controls
Partner Referral Tracking Review Search 138	Saved Search	Partner Referral Tracking
Sales Tax Exception Review Review Search 194	Saved Search	Sales Tax Exception Review
Customer Deposit Matching Review Search 250	Saved Search	Customer Deposit Matching
Order Approval Workflow Review Search 306	Saved Search	Order Approval Workflow
Vendor Bill Exception Review Scheduled	Scheduled Script	Vendor Bill Exception Review

Assembly Item

Source: `Record-Types/assembly-item`

Projects**13**
Components**19**
Primary areas**Scripts / Saved Searches / Custom Lists**

Configuration summary

Assembly Item is connected to 13 detected configuration groups and 19 directly matched components. The largest groups include Quote Expiration Monitoring, Serialized Item Compliance, Invoice Delivery Preferences, Forecast Adjustment Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Saved Searches	3
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Quote Expiration Monitoring Status List	Custom List	Quote Expiration Monitoring
Serialized Item Compliance Status List	Custom List	Serialized Item Compliance
Invoice Delivery Preferences Review Search 10	Saved Search	Invoice Delivery Preferences
Forecast Adjustment Review Review Search 66	Saved Search	Forecast Adjustment Review
Support Intake Triage Review Search 122	Saved Search	Support Intake Triage
Vendor Payment Release Review Search 178	Saved Search	Vendor Payment Release
Invoice Queue Automation Review Search 234	Saved Search	Invoice Queue Automation
Sales Order Risk Review Review Search 290	Saved Search	Sales Order Risk Review
Quote Expiration Monitoring Client	Client Script	Quote Expiration Monitoring
Invoice Delivery Preferences Client	Client Script	Invoice Delivery Preferences
Support Case Routing User Event	User Event Script	Support Case Routing

COMPONENT	TYPE	PROJECT
Revenue Recognition Review User Event	User Event Script	Revenue Recognition Review
Cash Sale Exception Review Map Reduce	Map/Reduce Script	Cash Sale Exception Review
Serialized Item Compliance Map Reduce	Map/Reduce Script	Serialized Item Compliance
Renewal Opportunity Routing Scheduled	Scheduled Script	Renewal Opportunity Routing
Billing Schedule Monitor Scheduled	Scheduled Script	Billing Schedule Monitor
Quote Expiration Monitoring RESTlet	RESTlet	Quote Expiration Monitoring
Invoice Delivery Preferences RESTlet	RESTlet	Invoice Delivery Preferences
Support Case Routing Bundle Installation	Bundle Installation Script	Support Case Routing

Billing Schedule

Source: `Record-Types/billing-schedule`

Projects**7**
Components**8**
Primary areas**Saved Searches / Scripts**

Configuration summary

Billing Schedule is connected to 7 detected configuration groups and 8 directly matched components. The largest groups include Project Task Assignment, Inventory Reorder Alerts, Item Fulfillment Controls, Backorder Review Queue.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2

Components

COMPONENT	TYPE	PROJECT
Project Task Assignment Review Search 34	Saved Search	Project Task Assignment
Inventory Reorder Alerts Review Search 90	Saved Search	Inventory Reorder Alerts
Item Fulfillment Controls Review Search 146	Saved Search	Item Fulfillment Controls
Backorder Review Queue Review Search 202	Saved Search	Backorder Review Queue
Fulfillment Hold Automation Review Search 258	Saved Search	Fulfillment Hold Automation
Purchase Price Variance Review Review Search 314	Saved Search	Purchase Price Variance Review
Item Fulfillment Labeling User Event	User Event Script	Item Fulfillment Labeling
Item Fulfillment Labeling RESTlet	RESTlet	Item Fulfillment Labeling

Bin

Source: `Record-Types/bin`

Projects**7**
Components**8**
Primary areas**Saved Searches / Scripts**

Configuration summary

Bin is connected to 7 detected configuration groups and 8 directly matched components. The largest groups include Shipping Exception Alerts, Renewal Opportunity Routing, Customer Credit Recheck, Contract Renewal Alerts.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2

Components

COMPONENT	TYPE	PROJECT
Shipping Exception Alerts Review Search 8	Saved Search	Shipping Exception Alerts
Renewal Opportunity Routing Review Search 64	Saved Search	Renewal Opportunity Routing
Customer Credit Recheck Review Search 120	Saved Search	Customer Credit Recheck
Contract Renewal Alerts Review Search 176	Saved Search	Contract Renewal Alerts
Expense Approval Routing Review Search 232	Saved Search	Expense Approval Routing
Billing Schedule Monitor Review Search 288	Saved Search	Billing Schedule Monitor
Quote Approval Matrix Client	Client Script	Quote Approval Matrix
Quote Approval Matrix RESTlet	RESTlet	Quote Approval Matrix

Calendar Event

Source: `Record-Types/calendar-event`

Projects**20**
Components**27**
Primary areas**Custom Fields / Saved Searches / Custom Lists**

Configuration summary

Calendar Event is connected to 20 detected configuration groups and 27 directly matched components. The largest groups include Vendor Compliance Checks, Project Billing Review, Item Master Governance, Price Level Governance.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Custom Lists / Custom Transaction Types	5

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Vendor Compliance Checks Routing Group	Transaction Body Custom Field	Vendor Compliance Checks
Project Billing Review Hold Reason	Transaction Body Custom Field	Project Billing Review
Item Master Governance Owner	Transaction Body Custom Field	Item Master Governance
Price Level Governance Approval Level	Transaction Body Custom Field	Price Level Governance
Order Approval Workflow Routing Group	Transaction Body Custom Field	Order Approval Workflow
Quote Expiration Monitoring Hold Reason	Transaction Body Custom Field	Quote Expiration Monitoring
Tax Code Review Owner	Transaction Column Custom Field	Tax Code Review
Contract Renewal Alerts Approval Level	Transaction Column Custom Field	Contract Renewal Alerts
Shipping Method Validation Routing Group	Transaction Column Custom Field	Shipping Method Validation
Invoice Queue Automation Hold Reason	Transaction Column Custom Field	Invoice Queue Automation
Backorder Review Queue Owner	Transaction Column Custom Field	Backorder Review Queue
Revenue Recognition Review Review Date	Entity Custom Field	Revenue Recognition Review
Forecast Adjustment Review Priority	Entity Custom Field	Forecast Adjustment Review
Sales Order Risk Review Priority	Item Custom Field	Sales Order Risk Review

COMPONENT	TYPE	PROJECT
Fulfillment Hold Automation Status	Item Custom Field	Fulfillment Hold Automation
Quote Approval Matrix Exception Flag	Item Custom Field	Quote Approval Matrix
Cash Sale Exception Review Status	CRM Custom Field	Cash Sale Exception Review
Tax Code Review Status List	Custom List	Tax Code Review
Demo Adjustment	Custom Transaction Type	Tax Code Review
Tax Code Review Workflow	Workflow	Tax Code Review
Forecast Adjustment Review Review Search 5	Saved Search	Forecast Adjustment Review
Support Intake Triage Review Search 61	Saved Search	Support Intake Triage
Vendor Payment Release Review Search 117	Saved Search	Vendor Payment Release
Invoice Queue Automation Review Search 173	Saved Search	Invoice Queue Automation
Sales Order Risk Review Review Search 229	Saved Search	Sales Order Risk Review
Vendor Bill Exception Review Review Search 285	Saved Search	Vendor Bill Exception Review
Tax Code Review Map Reduce	Map/Reduce Script	Tax Code Review

Campaign

Source: `Record-Types/campaign`

Projects**22**
Components**26**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Campaign is connected to 22 detected configuration groups and 26 directly matched components. The largest groups include Credit Hold Review, Payment Application Review, Invoice Delivery Preferences, Purchase Order Closeout.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Workflows	4

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Credit Hold Review Priority	Transaction Body Custom Field	Credit Hold Review
Payment Application Review Status	Transaction Body Custom Field	Payment Application Review
Invoice Delivery Preferences Exception Flag	Transaction Body Custom Field	Invoice Delivery Preferences
Purchase Order Closeout Review Date	Transaction Body Custom Field	Purchase Order Closeout
Vendor Compliance Checks Priority	Transaction Body Custom Field	Vendor Compliance Checks
Inventory Count Reconciliation Exception Flag	Transaction Column Custom Field	Inventory Count Reconciliation
Customer Duplicate Review Review Date	Transaction Column Custom Field	Customer Duplicate Review
Item Fulfillment Labeling Priority	Transaction Column Custom Field	Item Fulfillment Labeling

COMPONENT	TYPE	PROJECT
Support Case Routing Status	Transaction Column Custom Field	Support Case Routing
Fulfillment Hold Automation Hold Reason	Entity Custom Field	Fulfillment Hold Automation
Quote Approval Matrix Owner	Entity Custom Field	Quote Approval Matrix
Sales Tax Exception Review Approval Level	Entity Custom Field	Sales Tax Exception Review
Case Follow-up Reminder Owner	Item Custom Field	Case Follow-up Reminder
Customer Tier Management Approval Level	Item Custom Field	Customer Tier Management
Drop Ship Coordination Routing Group	Item Custom Field	Drop Ship Coordination
Support Intake Triage Routing Group	CRM Custom Field	Support Intake Triage
Expense Approval Routing Status List	Custom List	Expense Approval Routing
Expense Approval Routing Workflow	Workflow	Expense Approval Routing
Purchase Price Variance Review Review Search 9	Saved Search	Purchase Price Variance Review
Item Master Governance Review Search 65	Saved Search	Item Master Governance
Customer Duplicate Review Review Search 121	Saved Search	Customer Duplicate Review
Cash Sale Exception Review Review Search 177	Saved Search	Cash Sale Exception Review
Order Change Audit Review Search 233	Saved Search	Order Change Audit
Inventory Transfer Review Review Search 289	Saved Search	Inventory Transfer Review
Expense Approval Routing User Event	User Event Script	Expense Approval Routing
Expense Approval Routing Workflow Action	Workflow Action Script	Expense Approval Routing

Cash Sale

Source: `Record-Types/cash-sale`

Projects**30**
Components**43**
Primary areas**Custom Fields / Scripts / Saved Searches**

Configuration summary

Cash Sale is connected to 30 detected configuration groups and 43 directly matched components. The largest groups include Support Case Routing, Tax Code Review, Contract Renewal Alerts, Shipping Method Validation.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Custom Lists / Scripts	3
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Segments / Saved Searches / Scripts	3
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Support Case Routing Exception Flag	Transaction Body Custom Field	Support Case Routing
Tax Code Review Review Date	Transaction Body Custom Field	Tax Code Review
Contract Renewal Alerts Priority	Transaction Body Custom Field	Contract Renewal Alerts
Shipping Method Validation Status	Transaction Body Custom Field	Shipping Method Validation
Invoice Queue Automation Exception Flag	Transaction Body Custom Field	Invoice Queue Automation
Backorder Review Queue Review Date	Transaction Body Custom Field	Backorder Review Queue
Fulfillment Hold Automation Priority	Transaction Column Custom Field	Fulfillment Hold Automation
Quote Approval Matrix Status	Transaction Column Custom Field	Quote Approval Matrix
Sales Tax Exception Review Exception Flag	Transaction Column Custom Field	Sales Tax Exception Review
Customer Onboarding Controls Review Date	Transaction Column Custom Field	Customer Onboarding Controls
Shipping Exception Alerts Priority	Transaction Column Custom Field	Shipping Exception Alerts
Commission Eligibility Flags Routing Group	Entity Custom Field	Commission Eligibility Flags

COMPONENT	TYPE	PROJECT
Cash Sale Exception Review Hold Reason	Entity Custom Field	Cash Sale Exception Review
Purchase Request Approval Hold Reason	Item Custom Field	Purchase Request Approval
Renewal Opportunity Routing Owner	Item Custom Field	Renewal Opportunity Routing
Service Case SLA Tracking Approval Level	Item Custom Field	Service Case SLA Tracking
Billing Schedule Monitor Owner	CRM Custom Field	Billing Schedule Monitor
Quote Approval Matrix Status List	Custom List	Quote Approval Matrix
Inventory Reorder Alerts Status List	Custom List	Inventory Reorder Alerts
Partner Referral Tracking Status List	Custom List	Partner Referral Tracking
Demo Channel	Custom Segment	Return Authorization Processing
Payment Application Review Workflow	Workflow	Payment Application Review
Serialized Item Compliance Review Search 17	Saved Search	Serialized Item Compliance
Demo Core Utilities Review Search 73	Saved Search	Demo Core Utilities
Vendor Compliance Checks Review Search 129	Saved Search	Vendor Compliance Checks
Return Authorization Processing Review Search 185	Saved Search	Return Authorization Processing
Item Margin Guardrails Review Search 241	Saved Search	Item Margin Guardrails
Case Escalation Management Review Search 297	Saved Search	Case Escalation Management
Inventory Reorder Alerts Client	Client Script	Inventory Reorder Alerts
Payment Application Review Client	Client Script	Payment Application Review
Purchase Price Variance Review Client	Client Script	Purchase Price Variance Review
Order Change Audit Client	Client Script	Order Change Audit
Project Billing Review User Event	User Event Script	Project Billing Review
Partner Referral Tracking User Event	User Event Script	Partner Referral Tracking
Return Authorization Processing Map Reduce	Map/Reduce Script	Return Authorization Processing
Quote Approval Matrix Map Reduce	Map/Reduce Script	Quote Approval Matrix
Case Follow-up Reminder Map Reduce	Map/Reduce Script	Case Follow-up Reminder

COMPONENT	TYPE	PROJECT
Inventory Reorder Alerts Scheduled	Scheduled Script	Inventory Reorder Alerts
Payment Application Review Suitelet	Suitelet	Payment Application Review
Purchase Price Variance Review Suitelet	Suitelet	Purchase Price Variance Review
Order Change Audit Suitelet	Suitelet	Order Change Audit
Project Billing Review Workflow Action	Workflow Action Script	Project Billing Review
Partner Referral Tracking Workflow Action	Workflow Action Script	Partner Referral Tracking

Class

Source: `Record-Types/class`

Projects**15**
Components**27**
Primary areas**Scripts / Saved Searches / Custom Lists**

Configuration summary

Class is connected to 15 detected configuration groups and 27 directly matched components. The largest groups include Item Fulfillment Controls, Return Authorization Processing, Vendor Compliance Checks, Cash Sale Exception Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts / Workflows	3
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Transaction Types	3
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Warehouse Transfer Controls	This configuration coordinates warehouse transfer controls for Department records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Saved Searches	3
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Item Fulfillment Controls Approval Level	Item Option Custom Field	Item Fulfillment Controls
Return Authorization Processing Owner	Other Custom Field	Return Authorization Processing
Vendor Compliance Checks Status List	Custom List	Vendor Compliance Checks
Cash Sale Exception Review Status List	Custom List	Cash Sale Exception Review

COMPONENT	TYPE	PROJECT
Vendor Bill Exception Review Status List	Custom List	Vendor Bill Exception Review
Invoice Delivery Preferences Status List	Custom List	Invoice Delivery Preferences
Item Fulfillment Labeling Status List	Custom List	Item Fulfillment Labeling
Demo Request	Custom Transaction Type	Fulfillment Hold Automation
Invoice Delivery Preferences Workflow	Workflow	Invoice Delivery Preferences
Inventory Count Reconciliation Review Search 31	Saved Search	Inventory Count Reconciliation
Commission Eligibility Flags Review Search 87	Saved Search	Commission Eligibility Flags
Warehouse Transfer Controls Review Search 143	Saved Search	Warehouse Transfer Controls
Partner Referral Tracking Review Search 199	Saved Search	Partner Referral Tracking
Sales Tax Exception Review Review Search 255	Saved Search	Sales Tax Exception Review
Customer Deposit Matching Review Search 311	Saved Search	Customer Deposit Matching
Fulfillment Hold Automation Client	Client Script	Fulfillment Hold Automation
Cash Sale Exception Review Client	Client Script	Cash Sale Exception Review
Vendor Bill Exception Review User Event	User Event Script	Vendor Bill Exception Review
Warehouse Transfer Controls User Event	User Event Script	Warehouse Transfer Controls
Vendor Compliance Checks Map Reduce	Map/Reduce Script	Vendor Compliance Checks
Sales Rep Assignment Rules Map Reduce	Map/Reduce Script	Sales Rep Assignment Rules
Invoice Delivery Preferences Map Reduce	Map/Reduce Script	Invoice Delivery Preferences
Item Fulfillment Labeling Map Reduce	Map/Reduce Script	Item Fulfillment Labeling
Fulfillment Hold Automation Suitelet	Suitelet	Fulfillment Hold Automation
Cash Sale Exception Review Suitelet	Suitelet	Cash Sale Exception Review
Vendor Bill Exception Review Workflow Action	Workflow Action Script	Vendor Bill Exception Review
Warehouse Transfer Controls Workflow Action	Workflow Action Script	Warehouse Transfer Controls

Contact

Source: `Record-Types/contact`

Projects**14**
Components**21**
Primary areas**Scripts / Saved Searches / Custom Lists**

Configuration summary

Contact is connected to 14 detected configuration groups and 21 directly matched components. The largest groups include Contract Renewal Alerts, Credit Hold Review, Item Margin Guardrails, Journal Approval Controls.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Segments / Scripts	2
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Contract Renewal Alerts Status List	Custom List	Contract Renewal Alerts
Demo Region	Custom Segment	Credit Hold Review
Item Margin Guardrails Workflow	Workflow	Item Margin Guardrails
Journal Approval Controls Review Search 38	Saved Search	Journal Approval Controls
Price Level Governance Review Search 94	Saved Search	Price Level Governance
Item Fulfillment Labeling Review Search 150	Saved Search	Item Fulfillment Labeling
Case Follow-up Reminder Review Search 206	Saved Search	Case Follow-up Reminder
Pricing Review Process Review Search 262	Saved Search	Pricing Review Process

COMPONENT	TYPE	PROJECT
Customer Onboarding Controls Client	Client Script	Customer Onboarding Controls
Item Margin Guardrails Client	Client Script	Item Margin Guardrails
Drop Ship Coordination Client	Client Script	Drop Ship Coordination
Support Intake Triage User Event	User Event Script	Support Intake Triage
Employee Approval Limits User Event	User Event Script	Employee Approval Limits
Campaign Response Routing Map Reduce	Map/Reduce Script	Campaign Response Routing
Credit Hold Review Scheduled	Scheduled Script	Credit Hold Review
Contract Renewal Alerts Scheduled	Scheduled Script	Contract Renewal Alerts
Project Task Assignment Scheduled	Scheduled Script	Project Task Assignment
Customer Onboarding Controls Suitelet	Suitelet	Customer Onboarding Controls
Item Margin Guardrails RESTlet	RESTlet	Item Margin Guardrails
Drop Ship Coordination RESTlet	RESTlet	Drop Ship Coordination
Support Intake Triage RESTlet	RESTlet	Support Intake Triage

Credit Memo

Source: `Record-Types/credit-memo`

Projects**7**
Components**7**
Primary areas**Saved Searches / Scripts**

Configuration summary

Credit Memo is connected to 7 detected configuration groups and 7 directly matched components. The largest groups include Customer Deposit Matching, Order Approval Workflow, Support Case Routing, Customer Tier Management.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Customer Deposit Matching Review Search 6	Saved Search	Customer Deposit Matching
Order Approval Workflow Review Search 62	Saved Search	Order Approval Workflow
Support Case Routing Review Search 118	Saved Search	Support Case Routing
Customer Tier Management Review Search 174	Saved Search	Customer Tier Management
Employee Approval Limits Review Search 230	Saved Search	Employee Approval Limits
Payment Application Review Review Search 286	Saved Search	Payment Application Review
Inventory Count Reconciliation Scheduled	Scheduled Script	Inventory Count Reconciliation

Customer

Source: `Record-Types/customer`

Projects**10**
Components**14**
Primary areas**Saved Searches / Scripts / Custom Fields**

Configuration summary

Customer is connected to 10 detected configuration groups and 14 directly matched components. The largest groups include Case Follow-up Reminder, Shipping Exception Alerts, Project Task Assignment, Customer Onboarding Controls.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Workflows	4
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	2
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Case Follow-up Reminder Review Date	Item Number Custom Field	Case Follow-up Reminder
Shipping Exception Alerts Exception Flag	Other Custom Field	Shipping Exception Alerts
Project Task Assignment Status List	Custom List	Project Task Assignment
Customer Onboarding Controls Workflow	Workflow	Customer Onboarding Controls
Project Task Assignment Workflow	Workflow	Project Task Assignment
Purchase Request Approval Review Search 35	Saved Search	Purchase Request Approval
Quote Expiration Monitoring Review Search 91	Saved Search	Quote Expiration Monitoring
Tax Code Review Review Search 147	Saved Search	Tax Code Review
Drop Ship Coordination Review Search 203	Saved Search	Drop Ship Coordination
Vendor Onboarding Review Review Search 259	Saved Search	Vendor Onboarding Review
Invoice Delivery Preferences Review Search 315	Saved Search	Invoice Delivery Preferences
Project Task Assignment User Event	User Event Script	Project Task Assignment
Customer Onboarding Controls Map Reduce	Map/Reduce Script	Customer Onboarding Controls
Project Task Assignment Portlet	Portlet Script	Project Task Assignment

Customer Deposit

Source: `Record-Types/customer-deposit`

Projects**7**
Components**9**
Primary areas**Saved Searches / Scripts / Custom Lists**

Configuration summary

Customer Deposit is connected to 7 detected configuration groups and 9 directly matched components. The largest groups include Sales Rep Assignment Rules, Pricing Review Process, Credit Hold Review, Shipping Exception Alerts.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Sales Rep Assignment Rules Status List	Custom List	Sales Rep Assignment Rules
Pricing Review Process Review Search 18	Saved Search	Pricing Review Process
Credit Hold Review Review Search 74	Saved Search	Credit Hold Review
Shipping Exception Alerts Review Search 130	Saved Search	Shipping Exception Alerts
Renewal Opportunity Routing Review Search 186	Saved Search	Renewal Opportunity Routing
Customer Credit Recheck Review Search 242	Saved Search	Customer Credit Recheck
Contract Renewal Alerts Review Search 298	Saved Search	Contract Renewal Alerts
Sales Rep Assignment Rules Client	Client Script	Sales Rep Assignment Rules
Sales Rep Assignment Rules RESTlet	RESTlet	Sales Rep Assignment Rules

Customer Payment

Source: `Record-Types/customer-payment`

Projects**7**
Components**8**
Primary areas**Saved Searches / Custom Fields / Scripts**

Configuration summary

Customer Payment is connected to 7 detected configuration groups and 8 directly matched components. The largest groups include Support Case Routing, Drop Ship Coordination, Invoice Queue Automation, Sales Order Risk Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	2
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Support Case Routing Review Date	Item Option Custom Field	Support Case Routing
Drop Ship Coordination Workflow	Workflow	Drop Ship Coordination
Invoice Queue Automation Review Search 51	Saved Search	Invoice Queue Automation
Sales Order Risk Review Review Search 107	Saved Search	Sales Order Risk Review
Vendor Bill Exception Review Review Search 163	Saved Search	Vendor Bill Exception Review
Project Billing Review Review Search 219	Saved Search	Project Billing Review
Inventory Count Reconciliation Review Search 275	Saved Search	Inventory Count Reconciliation
Drop Ship Coordination Map Reduce	Map/Reduce Script	Drop Ship Coordination

Department

Source: `Record-Types/department`

Projects**6**
Components**6**
Primary areas**Saved Searches / Scripts**

Configuration summary

Department is connected to 6 detected configuration groups and 6 directly matched components. The largest groups include Payment Application Review, Revenue Recognition Review, Service Case SLA Tracking, Campaign Response Routing.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Warehouse Transfer Controls	This configuration coordinates warehouse transfer controls for Department records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Payment Application Review Review Search 42	Saved Search	Payment Application Review
Revenue Recognition Review Review Search 98	Saved Search	Revenue Recognition Review

COMPONENT	TYPE	PROJECT
Service Case SLA Tracking Review Search 154	Saved Search	Service Case SLA Tracking
Campaign Response Routing Review Search 210	Saved Search	Campaign Response Routing
Shipping Method Validation Review Search 266	Saved Search	Shipping Method Validation
Warehouse Transfer Controls Scheduled	Scheduled Script	Warehouse Transfer Controls

Employee

Source: `Record-Types/employee`

Projects**22**
Components**26**
Primary areas**Custom Fields / Saved Searches / Custom Lists**

Configuration summary

Employee is connected to 22 detected configuration groups and 26 directly matched components. The largest groups include Customer Onboarding Controls, Shipping Exception Alerts, Revenue Recognition Review, Forecast Adjustment Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts / Workflows	3
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Customer Onboarding Controls Priority	Transaction Body Custom Field	Customer Onboarding Controls
Shipping Exception Alerts Status	Transaction Body Custom Field	Shipping Exception Alerts
Revenue Recognition Review Exception Flag	Transaction Body Custom Field	Revenue Recognition Review
Forecast Adjustment Review Review Date	Transaction Body Custom Field	Forecast Adjustment Review
Project Task Assignment Priority	Transaction Body Custom Field	Project Task Assignment
Return Authorization Processing Status	Transaction Body Custom Field	Return Authorization Processing
Commission Eligibility Flags Review Date	Transaction Column Custom Field	Commission Eligibility Flags
Cash Sale Exception Review Priority	Transaction Column Custom Field	Cash Sale Exception Review

COMPONENT	TYPE	PROJECT
Case Follow-up Reminder Status	Transaction Column Custom Field	Case Follow-up Reminder
Customer Tier Management Exception Flag	Transaction Column Custom Field	Customer Tier Management
Purchase Price Variance Review Owner	Entity Custom Field	Purchase Price Variance Review
Journal Approval Controls Approval Level	Entity Custom Field	Journal Approval Controls
Customer Deposit Matching Routing Group	Entity Custom Field	Customer Deposit Matching
Pricing Review Process Approval Level	Item Custom Field	Pricing Review Process
Employee Approval Limits Routing Group	Item Custom Field	Employee Approval Limits
Vendor Onboarding Review Hold Reason	Item Custom Field	Vendor Onboarding Review
Campaign Response Routing Routing Group	CRM Custom Field	Campaign Response Routing
Purchase Request Approval Status List	Custom List	Purchase Request Approval
Purchase Request Approval Workflow	Workflow	Purchase Request Approval
Tax Code Review Review Search 25	Saved Search	Tax Code Review
Drop Ship Coordination Review Search 81	Saved Search	Drop Ship Coordination
Vendor Onboarding Review Review Search 137	Saved Search	Vendor Onboarding Review
Invoice Delivery Preferences Review Search 193	Saved Search	Invoice Delivery Preferences
Forecast Adjustment Review Review Search 249	Saved Search	Forecast Adjustment Review
Support Intake Triage Review Search 305	Saved Search	Support Intake Triage
Purchase Request Approval Map Reduce	Map/Reduce Script	Purchase Request Approval

Estimate

Source: `Record-Types/estimate`

Projects**7**
Components**10**
Primary areas**Saved Searches / Scripts / Custom Lists**

Configuration summary

Estimate is connected to 7 detected configuration groups and 10 directly matched components. The largest groups include Item Fulfillment Controls, Fulfillment Hold Automation, Purchase Price Variance Review, Item Master Governance.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Workflows	4
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Item Fulfillment Controls Status List	Custom List	Item Fulfillment Controls
Item Fulfillment Controls Workflow	Workflow	Item Fulfillment Controls
Fulfillment Hold Automation Review Search 14	Saved Search	Fulfillment Hold Automation
Purchase Price Variance Review Review Search 70	Saved Search	Purchase Price Variance Review
Item Master Governance Review Search 126	Saved Search	Item Master Governance
Customer Duplicate Review Review Search 182	Saved Search	Customer Duplicate Review
Cash Sale Exception Review Review Search 238	Saved Search	Cash Sale Exception Review
Order Change Audit Review Search 294	Saved Search	Order Change Audit
Item Fulfillment Controls User Event	User Event Script	Item Fulfillment Controls
Item Fulfillment Controls Bundle Installation	Bundle Installation Script	Item Fulfillment Controls

Expense Report

Source: `Record-Types/expense-report`

Projects**7**
Components**9**
Primary areas**Saved Searches / Scripts / Custom Fields**

Configuration summary

Expense Report is connected to 7 detected configuration groups and 9 directly matched components. The largest groups include Vendor Compliance Checks, Renewal Opportunity Routing, Purchase Order Closeout, Project Task Assignment.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Vendor Compliance Checks Hold Reason	Item Option Custom Field	Vendor Compliance Checks
Renewal Opportunity Routing Workflow	Workflow	Renewal Opportunity Routing
Purchase Order Closeout Review Search 39	Saved Search	Purchase Order Closeout
Project Task Assignment Review Search 95	Saved Search	Project Task Assignment
Inventory Reorder Alerts Review Search 151	Saved Search	Inventory Reorder Alerts
Item Fulfillment Controls Review Search 207	Saved Search	Item Fulfillment Controls
Backorder Review Queue Review Search 263	Saved Search	Backorder Review Queue
Renewal Opportunity Routing User Event	User Event Script	Renewal Opportunity Routing
Renewal Opportunity Routing Workflow Action	Workflow Action Script	Renewal Opportunity Routing

Inventory Adjustment

Source: `Record-Types/inventory-adjustment`

Projects**7**
Components**7**
Primary areas**Saved Searches / Scripts**

Configuration summary

Inventory Adjustment is connected to 7 detected configuration groups and 7 directly matched components. The largest groups include Quote Expiration Monitoring, Tax Code Review, Drop Ship Coordination, Vendor Onboarding Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Quote Expiration Monitoring Review Search 30	Saved Search	Quote Expiration Monitoring
Tax Code Review Review Search 86	Saved Search	Tax Code Review
Drop Ship Coordination Review Search 142	Saved Search	Drop Ship Coordination
Vendor Onboarding Review Review Search 198	Saved Search	Vendor Onboarding Review
Invoice Delivery Preferences Review Search 254	Saved Search	Invoice Delivery Preferences
Forecast Adjustment Review Review Search 310	Saved Search	Forecast Adjustment Review
Item Master Governance User Event	User Event Script	Item Master Governance

Inventory Item

Source: `Record-Types/inventory-item`

Projects**23**
Components**30**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Inventory Item is connected to 23 detected configuration groups and 30 directly matched components. The largest groups include Invoice Queue Automation, Backorder Review Queue, Sales Rep Assignment Rules, Partner Referral Tracking.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Workflows	4
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Invoice Queue Automation Owner	Transaction Body Custom Field	Invoice Queue Automation
Backorder Review Queue Approval Level	Transaction Body Custom Field	Backorder Review Queue
Sales Rep Assignment Rules Routing Group	Transaction Body Custom Field	Sales Rep Assignment Rules
Partner Referral Tracking Hold Reason	Transaction Body Custom Field	Partner Referral Tracking
Inventory Transfer Review Owner	Transaction Body Custom Field	Inventory Transfer Review
Credit Hold Review Approval Level	Transaction Body Custom Field	Credit Hold Review

COMPONENT	TYPE	PROJECT
Revenue Recognition Review Hold Reason	Transaction Column Custom Field	Revenue Recognition Review
Forecast Adjustment Review Owner	Transaction Column Custom Field	Forecast Adjustment Review
Project Task Assignment Approval Level	Transaction Column Custom Field	Project Task Assignment
Return Authorization Processing Routing Group	Transaction Column Custom Field	Return Authorization Processing
Drop Ship Coordination Status	Entity Custom Field	Drop Ship Coordination
Expense Approval Routing Exception Flag	Entity Custom Field	Expense Approval Routing
Serialized Item Compliance Review Date	Entity Custom Field	Serialized Item Compliance
Inventory Reorder Alerts Exception Flag	Item Custom Field	Inventory Reorder Alerts
Item Margin Guardrails Review Date	Item Custom Field	Item Margin Guardrails
Commission Eligibility Flags Priority	Item Custom Field	Commission Eligibility Flags
Journal Approval Controls Review Date	CRM Custom Field	Journal Approval Controls
Demo Core Utilities Status List	Custom List	Demo Core Utilities
Pricing Review Process Workflow	Workflow	Pricing Review Process
Demo Core Utilities Workflow	Workflow	Demo Core Utilities
Credit Hold Review Review Search 13	Saved Search	Credit Hold Review
Shipping Exception Alerts Review Search 69	Saved Search	Shipping Exception Alerts
Renewal Opportunity Routing Review Search 125	Saved Search	Renewal Opportunity Routing
Customer Credit Recheck Review Search 181	Saved Search	Customer Credit Recheck
Contract Renewal Alerts Review Search 237	Saved Search	Contract Renewal Alerts
Expense Approval Routing Review Search 293	Saved Search	Expense Approval Routing
Demo Core Utilities Client	Client Script	Demo Core Utilities
Pricing Review Process User Event	User Event Script	Pricing Review Process
Demo Core Utilities Suitelet	Suitelet	Demo Core Utilities
Pricing Review Process RESTlet	RESTlet	Pricing Review Process

Inventory Transfer

Source: `Record-Types/inventory-transfer`

Projects**9**
Components**11**
Primary areas**Saved Searches / Custom Fields / Scripts**

Configuration summary

Inventory Transfer is connected to 9 detected configuration groups and 11 directly matched components. The largest groups include Purchase Request Approval, Credit Hold Review, Contract Renewal Alerts, Backorder Review Queue.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Purchase Request Approval Exception Flag	Item Option Custom Field	Purchase Request Approval
Credit Hold Review Status	Other Custom Field	Credit Hold Review
Contract Renewal Alerts Workflow	Workflow	Contract Renewal Alerts
Backorder Review Queue Review Search 19	Saved Search	Backorder Review Queue
Fulfillment Hold Automation Review Search 75	Saved Search	Fulfillment Hold Automation
Purchase Price Variance Review Review Search 131	Saved Search	Purchase Price Variance Review
Item Master Governance Review Search 187	Saved Search	Item Master Governance
Customer Duplicate Review Review Search 243	Saved Search	Customer Duplicate Review
Cash Sale Exception Review Review Search 299	Saved Search	Cash Sale Exception Review
Contract Renewal Alerts User Event	User Event Script	Contract Renewal Alerts
Contract Renewal Alerts Workflow Action	Workflow Action Script	Contract Renewal Alerts

Invoice

Source: `Record-Types/invoice`

Projects**7**
Components**9**
Primary areas**Saved Searches / Scripts / Workflows**

Configuration summary

Invoice is connected to 7 detected configuration groups and 9 directly matched components. The largest groups include Vendor Compliance Checks, Return Authorization Processing, Item Margin Guardrails, Case Escalation Management.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Vendor Compliance Checks Workflow	Workflow	Vendor Compliance Checks
Return Authorization Processing Review Search 2	Saved Search	Return Authorization Processing
Item Margin Guardrails Review Search 58	Saved Search	Item Margin Guardrails
Case Escalation Management Review Search 114	Saved Search	Case Escalation Management
Sales Rep Assignment Rules Review Search 170	Saved Search	Sales Rep Assignment Rules
Quote Approval Matrix Review Search 226	Saved Search	Quote Approval Matrix
Journal Approval Controls Review Search 282	Saved Search	Journal Approval Controls
Vendor Compliance Checks Client	Client Script	Vendor Compliance Checks
Vendor Compliance Checks Suitelet	Suitelet	Vendor Compliance Checks

Item Fulfillment

Source: `Record-Types/item-fulfillment`

Projects**7**
Components**9**
Primary areas**Saved Searches / Scripts / Custom Fields**

Configuration summary

Item Fulfillment is connected to 7 detected configuration groups and 9 directly matched components. The largest groups include Demo Core Utilities, Support Case Routing, Employee Approval Limits, Payment Application Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Demo Core Utilities Routing Group	Item Number Custom Field	Demo Core Utilities
Support Case Routing Workflow	Workflow	Support Case Routing
Employee Approval Limits Review Search 47	Saved Search	Employee Approval Limits
Payment Application Review Review Search 103	Saved Search	Payment Application Review
Revenue Recognition Review Review Search 159	Saved Search	Revenue Recognition Review
Service Case SLA Tracking Review Search 215	Saved Search	Service Case SLA Tracking
Campaign Response Routing Review Search 271	Saved Search	Campaign Response Routing
Support Case Routing Client	Client Script	Support Case Routing
Support Case Routing Scheduled	Scheduled Script	Support Case Routing

Item Receipt

Source: `Record-Types/item-receipt`

Projects**8**
Components**11**
Primary areas**Saved Searches / Scripts / Custom Fields**

Configuration summary

Item Receipt is connected to 8 detected configuration groups and 11 directly matched components. The largest groups include Sales Order Risk Review, Revenue Recognition Review, Vendor Compliance Checks, Return Authorization Processing.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Workflows	4
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Sales Order Risk Review Routing Group	Item Option Custom Field	Sales Order Risk Review
Revenue Recognition Review Status List	Custom List	Revenue Recognition Review
Revenue Recognition Review Workflow	Workflow	Revenue Recognition Review
Vendor Compliance Checks Review Search 7	Saved Search	Vendor Compliance Checks
Return Authorization Processing Review Search 63	Saved Search	Return Authorization Processing
Item Margin Guardrails Review Search 119	Saved Search	Item Margin Guardrails
Case Escalation Management Review Search 175	Saved Search	Case Escalation Management
Sales Rep Assignment Rules Review Search 231	Saved Search	Sales Rep Assignment Rules
Quote Approval Matrix Review Search 287	Saved Search	Quote Approval Matrix
Revenue Recognition Review Client	Client Script	Revenue Recognition Review
Revenue Recognition Review Suitelet	Suitelet	Revenue Recognition Review

Journal Entry

Source: `Record-Types/journal-entry`

Projects**7**
Components**9**
Primary areas**Saved Searches / Scripts / Workflows**

Configuration summary

Journal Entry is connected to 7 detected configuration groups and 9 directly matched components. The largest groups include Case Escalation Management, Item Fulfillment Labeling, Case Follow-up Reminder, Pricing Review Process.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Case Escalation Management Workflow	Workflow	Case Escalation Management
Item Fulfillment Labeling Review Search 28	Saved Search	Item Fulfillment Labeling
Case Follow-up Reminder Review Search 84	Saved Search	Case Follow-up Reminder
Pricing Review Process Review Search 140	Saved Search	Pricing Review Process
Credit Hold Review Review Search 196	Saved Search	Credit Hold Review
Shipping Exception Alerts Review Search 252	Saved Search	Shipping Exception Alerts
Renewal Opportunity Routing Review Search 308	Saved Search	Renewal Opportunity Routing
Case Escalation Management Client	Client Script	Case Escalation Management
Case Escalation Management RESTlet	RESTlet	Case Escalation Management

Kit Item

Source: `Record-Types/kit-item`

Projects**8**
Components**10**
Primary areas**Saved Searches / Custom Fields / Scripts**

Configuration summary

Kit Item is connected to 8 detected configuration groups and 10 directly matched components. The largest groups include Vendor Payment Release, Vendor Bill Exception Review, Billing Schedule Monitor, Cash Sale Exception Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Vendor Payment Release Owner	Item Number Custom Field	Vendor Payment Release
Vendor Bill Exception Review Hold Reason	Other Custom Field	Vendor Bill Exception Review
Billing Schedule Monitor Workflow	Workflow	Billing Schedule Monitor
Cash Sale Exception Review Review Search 55	Saved Search	Cash Sale Exception Review
Order Change Audit Review Search 111	Saved Search	Order Change Audit
Inventory Transfer Review Review Search 167	Saved Search	Inventory Transfer Review
Customer Onboarding Controls Review Search 223	Saved Search	Customer Onboarding Controls
Purchase Request Approval Review Search 279	Saved Search	Purchase Request Approval
Billing Schedule Monitor User Event	User Event Script	Billing Schedule Monitor
Billing Schedule Monitor Workflow Action	Workflow Action Script	Billing Schedule Monitor

Lead

Source: `Record-Types/lead`

Projects**23**
Components**26**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Lead is connected to 23 detected configuration groups and 26 directly matched components. The largest groups include Pricing Review Process, Employee Approval Limits, Vendor Onboarding Review, Billing Schedule Monitor.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Pricing Review Process Review Date	Transaction Body Custom Field	Pricing Review Process
Employee Approval Limits Priority	Transaction Body Custom Field	Employee Approval Limits
Vendor Onboarding Review Status	Transaction Body Custom Field	Vendor Onboarding Review
Billing Schedule Monitor Exception Flag	Transaction Body Custom Field	Billing Schedule Monitor
Demo Core Utilities Review Date	Transaction Body Custom Field	Demo Core Utilities
Vendor Bill Exception Review Priority	Transaction Body Custom Field	Vendor Bill Exception Review
Project Billing Review Status	Transaction Column Custom Field	Project Billing Review
Item Master Governance Exception Flag	Transaction Column Custom Field	Item Master Governance

COMPONENT	TYPE	PROJECT
Price Level Governance Review Date	Transaction Column Custom Field	Price Level Governance
Order Approval Workflow Priority	Transaction Column Custom Field	Order Approval Workflow
Quote Expiration Monitoring Status	Transaction Column Custom Field	Quote Expiration Monitoring
Sales Rep Assignment Rules Hold Reason	Entity Custom Field	Sales Rep Assignment Rules
Partner Referral Tracking Owner	Entity Custom Field	Partner Referral Tracking
Inventory Transfer Review Approval Level	Entity Custom Field	Inventory Transfer Review
Support Case Routing Owner	Item Custom Field	Support Case Routing
Tax Code Review Approval Level	Item Custom Field	Tax Code Review
Contract Renewal Alerts Routing Group	Item Custom Field	Contract Renewal Alerts
Forecast Adjustment Review Approval Level	CRM Custom Field	Forecast Adjustment Review
Shipping Exception Alerts Workflow	Workflow	Shipping Exception Alerts
Expense Approval Routing Review Search 49	Saved Search	Expense Approval Routing
Billing Schedule Monitor Review Search 105	Saved Search	Billing Schedule Monitor
Purchase Order Closeout Review Search 161	Saved Search	Purchase Order Closeout
Project Task Assignment Review Search 217	Saved Search	Project Task Assignment
Inventory Reorder Alerts Review Search 273	Saved Search	Inventory Reorder Alerts
Shipping Exception Alerts User Event	User Event Script	Shipping Exception Alerts
Shipping Exception Alerts Workflow Action	Workflow Action Script	Shipping Exception Alerts

Location

Source: `Record-Types/location`

Projects**22**
Components**25**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Location is connected to 22 detected configuration groups and 25 directly matched components. The largest groups include Item Fulfillment Controls, Case Escalation Management, Warehouse Transfer Controls, Order Change Audit.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Warehouse Transfer Controls	This configuration coordinates warehouse transfer controls for Department records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Item Fulfillment Controls Owner	Transaction Body Custom Field	Item Fulfillment Controls
Case Escalation Management Approval Level	Transaction Body Custom Field	Case Escalation Management
Warehouse Transfer Controls Routing Group	Transaction Body Custom Field	Warehouse Transfer Controls
Order Change Audit Hold Reason	Transaction Body Custom Field	Order Change Audit
Pricing Review Process Owner	Transaction Body Custom Field	Pricing Review Process
Employee Approval Limits Approval Level	Transaction Body Custom Field	Employee Approval Limits
Payment Application Review Routing Group	Transaction Column Custom Field	Payment Application Review
Invoice Delivery Preferences Hold Reason	Transaction Column Custom Field	Invoice Delivery Preferences

COMPONENT	TYPE	PROJECT
Purchase Order Closeout Owner	Transaction Column Custom Field	Purchase Order Closeout
Vendor Compliance Checks Approval Level	Transaction Column Custom Field	Vendor Compliance Checks
Tax Code Review Priority	Entity Custom Field	Tax Code Review
Contract Renewal Alerts Status	Entity Custom Field	Contract Renewal Alerts
Shipping Method Validation Exception Flag	Entity Custom Field	Shipping Method Validation
Project Task Assignment Status	Item Custom Field	Project Task Assignment
Return Authorization Processing Exception Flag	Item Custom Field	Return Authorization Processing
Inventory Count Reconciliation Review Date	Item Custom Field	Inventory Count Reconciliation
Sales Tax Exception Review Review Date	CRM Custom Field	Sales Tax Exception Review
Service Case SLA Tracking Workflow	Workflow	Service Case SLA Tracking
Case Escalation Management Review Search 53	Saved Search	Case Escalation Management
Sales Rep Assignment Rules Review Search 109	Saved Search	Sales Rep Assignment Rules
Quote Approval Matrix Review Search 165	Saved Search	Quote Approval Matrix
Journal Approval Controls Review Search 221	Saved Search	Journal Approval Controls
Price Level Governance Review Search 277	Saved Search	Price Level Governance
Service Case SLA Tracking Client	Client Script	Service Case SLA Tracking
Service Case SLA Tracking Suitelet	Suitelet	Service Case SLA Tracking

Lot Numbered Item

Source: `Record-Types/lot-numbered-item`

Projects**24**
Components**27**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Lot Numbered Item is connected to 24 detected configuration groups and 27 directly matched components. The largest groups include Customer Tier Management, Drop Ship Coordination, Expense Approval Routing, Serialized Item Compliance.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Warehouse Transfer Controls	This configuration coordinates warehouse transfer controls for Department records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Workflows	4
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Customer Tier Management Review Date	Transaction Body Custom Field	Customer Tier Management
Drop Ship Coordination Priority	Transaction Body Custom Field	Drop Ship Coordination
Expense Approval Routing Status	Transaction Body Custom Field	Expense Approval Routing
Serialized Item Compliance Exception Flag	Transaction Body Custom Field	Serialized Item Compliance
Sales Order Risk Review Review Date	Transaction Body Custom Field	Sales Order Risk Review
Purchase Price Variance Review Status	Transaction Column Custom Field	Purchase Price Variance Review

COMPONENT	TYPE	PROJECT
Journal Approval Controls Exception Flag	Transaction Column Custom Field	Journal Approval Controls
Customer Deposit Matching Review Date	Transaction Column Custom Field	Customer Deposit Matching
Purchase Request Approval Priority	Transaction Column Custom Field	Purchase Request Approval
Case Escalation Management Routing Group	Entity Custom Field	Case Escalation Management
Warehouse Transfer Controls Hold Reason	Entity Custom Field	Warehouse Transfer Controls
Order Change Audit Owner	Entity Custom Field	Order Change Audit
Order Approval Workflow Hold Reason	Item Custom Field	Order Approval Workflow
Quote Expiration Monitoring Owner	Item Custom Field	Quote Expiration Monitoring
Customer Credit Recheck Approval Level	Item Custom Field	Customer Credit Recheck
Invoice Delivery Preferences Owner	CRM Custom Field	Invoice Delivery Preferences
Purchase Order Closeout Approval Level	CRM Custom Field	Purchase Order Closeout
Shipping Method Validation Status List	Custom List	Shipping Method Validation
Shipping Method Validation Workflow	Workflow	Shipping Method Validation
Price Level Governance Review Search 33	Saved Search	Price Level Governance
Item Fulfillment Labeling Review Search 89	Saved Search	Item Fulfillment Labeling
Case Follow-up Reminder Review Search 145	Saved Search	Case Follow-up Reminder
Pricing Review Process Review Search 201	Saved Search	Pricing Review Process
Credit Hold Review Review Search 257	Saved Search	Credit Hold Review
Shipping Exception Alerts Review Search 313	Saved Search	Shipping Exception Alerts
Shipping Method Validation Client	Client Script	Shipping Method Validation
Shipping Method Validation Suitelet	Suitelet	Shipping Method Validation

Non-inventory Item

Source: `Record-Types/non-inventory-item`

Projects**22**
Components**25**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Non-inventory Item is connected to 22 detected configuration groups and 25 directly matched components. The largest groups include Return Authorization Processing, Inventory Count Reconciliation, Customer Duplicate Review, Item Fulfillment Labeling.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Warehouse Transfer Controls	This configuration coordinates warehouse transfer controls for Department records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	2
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Return Authorization Processing Hold Reason	Transaction Body Custom Field	Return Authorization Processing
Inventory Count Reconciliation Owner	Transaction Body Custom Field	Inventory Count Reconciliation
Customer Duplicate Review Approval Level	Transaction Body Custom Field	Customer Duplicate Review
Item Fulfillment Labeling Routing Group	Transaction Body Custom Field	Item Fulfillment Labeling
Support Case Routing Hold Reason	Transaction Body Custom Field	Support Case Routing
Drop Ship Coordination Approval Level	Transaction Column Custom Field	Drop Ship Coordination
Expense Approval Routing Routing Group	Transaction Column Custom Field	Expense Approval Routing
Serialized Item Compliance Hold Reason	Transaction Column Custom Field	Serialized Item Compliance

COMPONENT	TYPE	PROJECT
Sales Order Risk Review Owner	Transaction Column Custom Field	Sales Order Risk Review
Renewal Opportunity Routing Review Date	Entity Custom Field	Renewal Opportunity Routing
Service Case SLA Tracking Priority	Entity Custom Field	Service Case SLA Tracking
Support Intake Triage Status	Entity Custom Field	Support Intake Triage
Demo Core Utilities Priority	Item Custom Field	Demo Core Utilities
Vendor Bill Exception Review Status	Item Custom Field	Vendor Bill Exception Review
Purchase Price Variance Review Exception Flag	Item Custom Field	Purchase Price Variance Review
Warehouse Transfer Controls Status	CRM Custom Field	Warehouse Transfer Controls
Order Change Audit Exception Flag	CRM Custom Field	Order Change Audit
Forecast Adjustment Review Workflow	Workflow	Forecast Adjustment Review
Warehouse Transfer Controls Review Search 21	Saved Search	Warehouse Transfer Controls
Partner Referral Tracking Review Search 77	Saved Search	Partner Referral Tracking
Sales Tax Exception Review Review Search 133	Saved Search	Sales Tax Exception Review
Customer Deposit Matching Review Search 189	Saved Search	Customer Deposit Matching
Order Approval Workflow Review Search 245	Saved Search	Order Approval Workflow
Support Case Routing Review Search 301	Saved Search	Support Case Routing
Forecast Adjustment Review Map Reduce	Map/Reduce Script	Forecast Adjustment Review

Opportunity

Source: `Record-Types/opportunity`

Projects**7**
Components**9**
Primary areas**Saved Searches / Scripts / Workflows**

Configuration summary

Opportunity is connected to 7 detected configuration groups and 9 directly matched components. The largest groups include Backorder Review Queue, Item Master Governance, Customer Duplicate Review, Cash Sale Exception Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Backorder Review Queue Workflow	Workflow	Backorder Review Queue
Item Master Governance Review Search 4	Saved Search	Item Master Governance
Customer Duplicate Review Review Search 60	Saved Search	Customer Duplicate Review
Cash Sale Exception Review Review Search 116	Saved Search	Cash Sale Exception Review
Order Change Audit Review Search 172	Saved Search	Order Change Audit
Inventory Transfer Review Review Search 228	Saved Search	Inventory Transfer Review
Customer Onboarding Controls Review Search 284	Saved Search	Customer Onboarding Controls
Backorder Review Queue User Event	User Event Script	Backorder Review Queue
Backorder Review Queue Bundle Installation	Bundle Installation Script	Backorder Review Queue

Partner

Source: `Record-Types/partner`

Projects**6**
Components**7**
Primary areas**Saved Searches / Scripts**

Configuration summary

Partner is connected to 6 detected configuration groups and 7 directly matched components. The largest groups include Contract Renewal Alerts, Expense Approval Routing, Billing Schedule Monitor, Purchase Order Closeout.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2

Components

COMPONENT	TYPE	PROJECT
Contract Renewal Alerts Review Search 54	Saved Search	Contract Renewal Alerts
Expense Approval Routing Review Search 110	Saved Search	Expense Approval Routing
Billing Schedule Monitor Review Search 166	Saved Search	Billing Schedule Monitor

COMPONENT	TYPE	PROJECT
Purchase Order Closeout Review Search 222	Saved Search	Purchase Order Closeout
Project Task Assignment Review Search 278	Saved Search	Project Task Assignment
Journal Approval Controls Client	Client Script	Journal Approval Controls
Journal Approval Controls RESTlet	RESTlet	Journal Approval Controls

Payment Method

Source: `Record-Types/payment-method`

Projects**7**
Components**8**
Primary areas**Saved Searches / Custom Lists / Scripts**

Configuration summary

Payment Method is connected to 7 detected configuration groups and 8 directly matched components. The largest groups include Sales Tax Exception Review, Shipping Method Validation, Serialized Item Compliance, Demo Core Utilities.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Sales Tax Exception Review Status List	Custom List	Sales Tax Exception Review
Shipping Method Validation Review Search 22	Saved Search	Shipping Method Validation
Serialized Item Compliance Review Search 78	Saved Search	Serialized Item Compliance
Demo Core Utilities Review Search 134	Saved Search	Demo Core Utilities
Vendor Compliance Checks Review Search 190	Saved Search	Vendor Compliance Checks
Return Authorization Processing Review Search 246	Saved Search	Return Authorization Processing
Item Margin Guardrails Review Search 302	Saved Search	Item Margin Guardrails
Sales Tax Exception Review Scheduled	Scheduled Script	Sales Tax Exception Review

Phone Call

Source: `Record-Types/phone-call`

Projects**6**
Components**8**
Primary areas**Saved Searches / Custom Transaction Types / Scripts**

Configuration summary

Phone Call is connected to 6 detected configuration groups and 8 directly matched components. The largest groups include Fulfillment Hold Automation, Order Change Audit, Inventory Transfer Review, Customer Onboarding Controls.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Transaction Types / Scripts / Workflows	3
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Demo Request	Custom Transaction Type	Fulfillment Hold Automation

COMPONENT	TYPE	PROJECT
Fulfillment Hold Automation Workflow	Workflow	Fulfillment Hold Automation
Order Change Audit Review Search 50	Saved Search	Order Change Audit
Inventory Transfer Review Review Search 106	Saved Search	Inventory Transfer Review
Customer Onboarding Controls Review Search 162	Saved Search	Customer Onboarding Controls
Purchase Request Approval Review Search 218	Saved Search	Purchase Request Approval
Quote Expiration Monitoring Review Search 274	Saved Search	Quote Expiration Monitoring
Fulfillment Hold Automation User Event	User Event Script	Fulfillment Hold Automation

Price Level

Source: `Record-Types/price-level`

Projects**7**
Components**8**
Primary areas**Saved Searches / Custom Lists / Scripts**

Configuration summary

Price Level is connected to 7 detected configuration groups and 8 directly matched components. The largest groups include Customer Duplicate Review, Drop Ship Coordination, Vendor Onboarding Review, Invoice Delivery Preferences.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Customer Duplicate Review Status List	Custom List	Customer Duplicate Review
Drop Ship Coordination Review Search 20	Saved Search	Drop Ship Coordination
Vendor Onboarding Review Review Search 76	Saved Search	Vendor Onboarding Review
Invoice Delivery Preferences Review Search 132	Saved Search	Invoice Delivery Preferences
Forecast Adjustment Review Review Search 188	Saved Search	Forecast Adjustment Review
Support Intake Triage Review Search 244	Saved Search	Support Intake Triage
Vendor Payment Release Review Search 300	Saved Search	Vendor Payment Release
Customer Duplicate Review User Event	User Event Script	Customer Duplicate Review

Project

Source: `Record-Types/project`

Projects**8**
Components**11**
Primary areas**Saved Searches / Scripts / Custom Fields**

Configuration summary

Project is connected to 8 detected configuration groups and 11 directly matched components. The largest groups include Pricing Review Process, Employee Approval Limits, Campaign Response Routing, Shipping Method Validation.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Workflows	4
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Pricing Review Process Priority	Item Option Custom Field	Pricing Review Process
Employee Approval Limits Status List	Custom List	Employee Approval Limits
Employee Approval Limits Workflow	Workflow	Employee Approval Limits
Campaign Response Routing Review Search 27	Saved Search	Campaign Response Routing
Shipping Method Validation Review Search 83	Saved Search	Shipping Method Validation
Serialized Item Compliance Review Search 139	Saved Search	Serialized Item Compliance
Demo Core Utilities Review Search 195	Saved Search	Demo Core Utilities
Vendor Compliance Checks Review Search 251	Saved Search	Vendor Compliance Checks
Return Authorization Processing Review Search 307	Saved Search	Return Authorization Processing
Employee Approval Limits Client	Client Script	Employee Approval Limits
Employee Approval Limits Suitelet	Suitelet	Employee Approval Limits

Prospect

Source: `Record-Types/prospect`

Projects**8**
Components**10**
Primary areas**Saved Searches / Custom Fields / Scripts**

Configuration summary

Prospect is connected to 8 detected configuration groups and 10 directly matched components. The largest groups include Customer Deposit Matching, Customer Tier Management, Campaign Response Routing, Quote Approval Matrix.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Customer Deposit Matching Status	Item Number Custom Field	Customer Deposit Matching
Customer Tier Management Priority	Other Custom Field	Customer Tier Management
Campaign Response Routing Workflow	Workflow	Campaign Response Routing
Quote Approval Matrix Review Search 43	Saved Search	Quote Approval Matrix
Journal Approval Controls Review Search 99	Saved Search	Journal Approval Controls
Price Level Governance Review Search 155	Saved Search	Price Level Governance
Item Fulfillment Labeling Review Search 211	Saved Search	Item Fulfillment Labeling
Case Follow-up Reminder Review Search 267	Saved Search	Case Follow-up Reminder
Campaign Response Routing Client	Client Script	Campaign Response Routing
Campaign Response Routing Suitelet	Suitelet	Campaign Response Routing

Purchase Order

Source: `Record-Types/purchase-order`

Projects**7**
Components**9**
Primary areas**Saved Searches / Scripts / Custom Records**

Configuration summary

Purchase Order is connected to 7 detected configuration groups and 9 directly matched components. The largest groups include Invoice Queue Automation, Sales Order Risk Review, Vendor Bill Exception Review, Project Billing Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Records / Scripts / Workflows	3
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Processing Queue	Custom Record Type	Invoice Queue Automation
Invoice Queue Automation Workflow	Workflow	Invoice Queue Automation
Sales Order Risk Review Review Search 46	Saved Search	Sales Order Risk Review
Vendor Bill Exception Review Review Search 102	Saved Search	Vendor Bill Exception Review
Project Billing Review Review Search 158	Saved Search	Project Billing Review
Inventory Count Reconciliation Review Search 214	Saved Search	Inventory Count Reconciliation
Commission Eligibility Flags Review Search 270	Saved Search	Commission Eligibility Flags
Inventory Transfer Review Map Reduce	Map/Reduce Script	Inventory Transfer Review
Invoice Queue Automation Map Reduce	Map/Reduce Script	Invoice Queue Automation

Purchase Requisition

Source: `Record-Types/purchase-requisition`

Projects**21**
Components**27**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Purchase Requisition is connected to 21 detected configuration groups and 27 directly matched components. The largest groups include Sales Order Risk Review, Fulfillment Hold Automation, Quote Approval Matrix, Sales Tax Exception Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Workflows	4
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Sales Order Risk Review Approval Level	Transaction Body Custom Field	Sales Order Risk Review
Fulfillment Hold Automation Routing Group	Transaction Body Custom Field	Fulfillment Hold Automation
Quote Approval Matrix Hold Reason	Transaction Body Custom Field	Quote Approval Matrix
Sales Tax Exception Review Owner	Transaction Body Custom Field	Sales Tax Exception Review
Customer Onboarding Controls Approval Level	Transaction Body Custom Field	Customer Onboarding Controls
Shipping Exception Alerts Routing Group	Transaction Body Custom Field	Shipping Exception Alerts
Renewal Opportunity Routing Hold Reason	Transaction Column Custom Field	Renewal Opportunity Routing
Service Case SLA Tracking Owner	Transaction Column Custom Field	Service Case SLA Tracking
Support Intake Triage Approval Level	Transaction Column Custom Field	Support Intake Triage
Inventory Reorder Alerts Routing Group	Transaction Column Custom Field	Inventory Reorder Alerts

COMPONENT	TYPE	PROJECT
Item Margin Guardrails Hold Reason	Transaction Column Custom Field	Item Margin Guardrails
Employee Approval Limits Status	Entity Custom Field	Employee Approval Limits
Vendor Onboarding Review Exception Flag	Entity Custom Field	Vendor Onboarding Review
Billing Schedule Monitor Review Date	Entity Custom Field	Billing Schedule Monitor
Item Fulfillment Controls Review Date	Item Custom Field	Item Fulfillment Controls
Case Escalation Management Priority	Item Custom Field	Case Escalation Management
Price Level Governance Priority	CRM Custom Field	Price Level Governance
Customer Credit Recheck Status List	Custom List	Customer Credit Recheck
Customer Credit Recheck Workflow	Workflow	Customer Credit Recheck
Inventory Reorder Alerts Review Search 29	Saved Search	Inventory Reorder Alerts
Item Fulfillment Controls Review Search 85	Saved Search	Item Fulfillment Controls
Backorder Review Queue Review Search 141	Saved Search	Backorder Review Queue
Fulfillment Hold Automation Review Search 197	Saved Search	Fulfillment Hold Automation
Purchase Price Variance Review Review Search 253	Saved Search	Purchase Price Variance Review
Item Master Governance Review Search 309	Saved Search	Item Master Governance
Customer Credit Recheck User Event	User Event Script	Customer Credit Recheck
Customer Credit Recheck Workflow Action	Workflow Action Script	Customer Credit Recheck

Return Authorization

Source: `Record-Types/return-authorization`

Projects**17**
Components**30**
Primary areas**Scripts / Saved Searches / Custom Lists**

Configuration summary

Return Authorization is connected to 17 detected configuration groups and 30 directly matched components. The largest groups include Order Approval Workflow, Customer Onboarding Controls, Credit Hold Review, Inventory Count Reconciliation.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists / Custom Segments	5
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Records	3
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Contract Renewal Alerts	This configuration coordinates contract renewal alerts for Inventory Transfer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Order Approval Workflow Exception Flag	Item Number Custom Field	Order Approval Workflow
Customer Onboarding Controls Status	Item Option Custom Field	Customer Onboarding Controls
Credit Hold Review Status List	Custom List	Credit Hold Review
Inventory Count Reconciliation Status List	Custom List	Inventory Count Reconciliation
Item Master Governance Status List	Custom List	Item Master Governance
Processing Queue	Custom Record Type	Invoice Queue Automation
Demo Region	Custom Segment	Credit Hold Review
Credit Hold Review Workflow	Workflow	Credit Hold Review
Renewal Opportunity Routing Review Search 3	Saved Search	Renewal Opportunity Routing
Customer Credit Recheck Review Search 59	Saved Search	Customer Credit Recheck
Contract Renewal Alerts Review Search 115	Saved Search	Contract Renewal Alerts
Expense Approval Routing Review Search 171	Saved Search	Expense Approval Routing
Billing Schedule Monitor Review Search 227	Saved Search	Billing Schedule Monitor
Purchase Order Closeout Review Search 283	Saved Search	Purchase Order Closeout
Item Fulfillment Controls Client	Client Script	Item Fulfillment Controls
Item Master Governance Client	Client Script	Item Master Governance
Inventory Transfer Review Client	Client Script	Inventory Transfer Review
Invoice Queue Automation User Event	User Event Script	Invoice Queue Automation
Credit Hold Review User Event	User Event Script	Credit Hold Review
Inventory Count Reconciliation User Event	User Event Script	Inventory Count Reconciliation
Sales Tax Exception Review User Event	User Event Script	Sales Tax Exception Review
Item Margin Guardrails Map Reduce	Map/Reduce Script	Item Margin Guardrails
Journal Approval Controls Map Reduce	Map/Reduce Script	Journal Approval Controls
Item Fulfillment Controls Suitelet	Suitelet	Item Fulfillment Controls
Item Master Governance Suitelet	Suitelet	Item Master Governance
Inventory Transfer Review Suitelet	Suitelet	Inventory Transfer Review

COMPONENT	TYPE	PROJECT
Invoice Queue Automation RESTlet	RESTlet	Invoice Queue Automation
Credit Hold Review Workflow Action	Workflow Action Script	Credit Hold Review
Inventory Count Reconciliation Workflow Action	Workflow Action Script	Inventory Count Reconciliation
Sales Tax Exception Review Portlet	Portlet Script	Sales Tax Exception Review

Sales Order

Source: `Record-Types/sales-order`

Projects**22**
Components**31**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Sales Order is connected to 22 detected configuration groups and 31 directly matched components. The largest groups include Order Approval Workflow, Quote Expiration Monitoring, Customer Credit Recheck, Campaign Response Routing.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Fields / Custom Lists	7
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Scripts / Workflows	3
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Order Approval Workflow Status	Transaction Body Custom Field	Order Approval Workflow
Quote Expiration Monitoring Exception Flag	Transaction Body Custom Field	Quote Expiration Monitoring
Customer Credit Recheck Review Date	Transaction Body Custom Field	Customer Credit Recheck
Campaign Response Routing Priority	Transaction Body Custom Field	Campaign Response Routing
Vendor Payment Release Status	Transaction Body Custom Field	Vendor Payment Release
Item Fulfillment Controls Exception Flag	Transaction Body Custom Field	Item Fulfillment Controls
Sales Rep Assignment Rules Priority	Transaction Column Custom Field	Sales Rep Assignment Rules
Partner Referral Tracking Status	Transaction Column Custom Field	Partner Referral Tracking

COMPONENT	TYPE	PROJECT
Inventory Transfer Review Exception Flag	Transaction Column Custom Field	Inventory Transfer Review
Credit Hold Review Review Date	Transaction Column Custom Field	Credit Hold Review
Inventory Count Reconciliation Approval Level	Entity Custom Field	Inventory Count Reconciliation
Customer Duplicate Review Routing Group	Entity Custom Field	Customer Duplicate Review
Item Fulfillment Labeling Hold Reason	Entity Custom Field	Item Fulfillment Labeling
Customer Onboarding Controls Routing Group	Item Custom Field	Customer Onboarding Controls
Shipping Exception Alerts Hold Reason	Item Custom Field	Shipping Exception Alerts
Revenue Recognition Review Owner	Item Custom Field	Revenue Recognition Review
Expense Approval Routing Hold Reason	CRM Custom Field	Expense Approval Routing
Serialized Item Compliance Owner	CRM Custom Field	Serialized Item Compliance
Order Approval Workflow Status List	Custom List	Order Approval Workflow
Approval Matrix	Custom Record Type	Order Approval Workflow
Order Approval Workflow Workflow	Workflow	Order Approval Workflow
Vendor Payment Release Workflow	Workflow	Vendor Payment Release
Order Approval Workflow Review Search 1	Saved Search	Order Approval Workflow
Support Case Routing Review Search 57	Saved Search	Support Case Routing
Customer Tier Management Review Search 113	Saved Search	Customer Tier Management
Employee Approval Limits Review Search 169	Saved Search	Employee Approval Limits
Payment Application Review Review Search 225	Saved Search	Payment Application Review
Revenue Recognition Review Review Search 281	Saved Search	Revenue Recognition Review
Order Approval Workflow Client	Client Script	Order Approval Workflow
Vendor Payment Release Map Reduce	Map/Reduce Script	Vendor Payment Release
Order Approval Workflow Scheduled	Scheduled Script	Order Approval Workflow

Sales Return

Source: `Record-Types/sales-return`

Projects**12**
Components**20**
Primary areas**Scripts / Saved Searches / Custom Lists**

Configuration summary

Sales Return is connected to 12 detected configuration groups and 20 directly matched components. The largest groups include Pricing Review Process, Forecast Adjustment Review, Tax Code Review, Customer Tier Management.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Transaction Types	3
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Saved Searches	3
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches / Scripts	2
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Pricing Review Process Status List	Custom List	Pricing Review Process
Forecast Adjustment Review Status List	Custom List	Forecast Adjustment Review
Demo Adjustment	Custom Transaction Type	Tax Code Review
Customer Tier Management Review Search 52	Saved Search	Customer Tier Management
Employee Approval Limits Review Search 108	Saved Search	Employee Approval Limits
Payment Application Review Review Search 164	Saved Search	Payment Application Review
Revenue Recognition Review Review Search 220	Saved Search	Revenue Recognition Review
Service Case SLA Tracking Review Search 276	Saved Search	Service Case SLA Tracking
Tax Code Review Client	Client Script	Tax Code Review
Forecast Adjustment Review User Event	User Event Script	Forecast Adjustment Review
Customer Tier Management User Event	User Event Script	Customer Tier Management
Service Case SLA Tracking User Event	User Event Script	Service Case SLA Tracking

COMPONENT	TYPE	PROJECT
Demo Core Utilities Map Reduce	Map/Reduce Script	Demo Core Utilities
Pricing Review Process Scheduled	Scheduled Script	Pricing Review Process
Customer Credit Recheck Scheduled	Scheduled Script	Customer Credit Recheck
Commission Eligibility Flags Scheduled	Scheduled Script	Commission Eligibility Flags
Purchase Order Closeout Scheduled	Scheduled Script	Purchase Order Closeout
Tax Code Review RESTlet	RESTlet	Tax Code Review
Forecast Adjustment Review RESTlet	RESTlet	Forecast Adjustment Review
Customer Tier Management Bundle Installation	Bundle Installation Script	Customer Tier Management

Sales Tax Item

Source: `Record-Types/sales-tax-item`

Projects**7**
Components**7**
Primary areas**Saved Searches / Scripts**

Configuration summary

Sales Tax Item is connected to 7 detected configuration groups and 7 directly matched components. The largest groups include Demo Core Utilities, Vendor Compliance Checks, Return Authorization Processing, Item Margin Guardrails.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Demo Core Utilities Review Search 12	Saved Search	Demo Core Utilities
Vendor Compliance Checks Review Search 68	Saved Search	Vendor Compliance Checks
Return Authorization Processing Review Search 124	Saved Search	Return Authorization Processing
Item Margin Guardrails Review Search 180	Saved Search	Item Margin Guardrails
Case Escalation Management Review Search 236	Saved Search	Case Escalation Management
Sales Rep Assignment Rules Review Search 292	Saved Search	Sales Rep Assignment Rules
Customer Deposit Matching Scheduled	Scheduled Script	Customer Deposit Matching

Serialized Inventory Item

Source: `Record-Types/serialized-inventory-item`

Projects**6**
Components**7**
Primary areas**Saved Searches / Scripts**

Configuration summary

Serialized Inventory Item is connected to 6 detected configuration groups and 7 directly matched components. The largest groups include Billing Schedule Monitor, Purchase Order Closeout, Project Task Assignment, Inventory Reorder Alerts.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Order Closeout	This configuration coordinates purchase order closeout for Account records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2

Components

COMPONENT	TYPE	PROJECT
Billing Schedule Monitor Review Search 44	Saved Search	Billing Schedule Monitor
Purchase Order Closeout Review Search 100	Saved Search	Purchase Order Closeout

COMPONENT	TYPE	PROJECT
Project Task Assignment Review Search 156	Saved Search	Project Task Assignment
Inventory Reorder Alerts Review Search 212	Saved Search	Inventory Reorder Alerts
Item Fulfillment Controls Review Search 268	Saved Search	Item Fulfillment Controls
Price Level Governance User Event	User Event Script	Price Level Governance
Price Level Governance RESTlet	RESTlet	Price Level Governance

Service Item

Source: `Record-Types/service-item`

Projects**7**
Components**7**
Primary areas**Saved Searches / Scripts**

Configuration summary

Service Item is connected to 7 detected configuration groups and 7 directly matched components. The largest groups include Service Case SLA Tracking, Campaign Response Routing, Shipping Method Validation, Serialized Item Compliance.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Service Case SLA Tracking Review Search 32	Saved Search	Service Case SLA Tracking
Campaign Response Routing Review Search 88	Saved Search	Campaign Response Routing
Shipping Method Validation Review Search 144	Saved Search	Shipping Method Validation
Serialized Item Compliance Review Search 200	Saved Search	Serialized Item Compliance
Demo Core Utilities Review Search 256	Saved Search	Demo Core Utilities
Vendor Compliance Checks Review Search 312	Saved Search	Vendor Compliance Checks
Partner Referral Tracking Scheduled	Scheduled Script	Partner Referral Tracking

Shipping Item

Source: `Record-Types/shipping-item`

Projects**9**
Components**11**
Primary areas**Saved Searches / Custom Fields / Scripts**

Configuration summary

Shipping Item is connected to 9 detected configuration groups and 11 directly matched components. The largest groups include Project Task Assignment, Backorder Review Queue, Serialized Item Compliance, Case Follow-up Reminder.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Project Task Assignment	This configuration coordinates project task assignment for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Project Task Assignment Hold Reason	Item Number Custom Field	Project Task Assignment
Backorder Review Queue Routing Group	Other Custom Field	Backorder Review Queue
Serialized Item Compliance Workflow	Workflow	Serialized Item Compliance
Case Follow-up Reminder Review Search 23	Saved Search	Case Follow-up Reminder
Pricing Review Process Review Search 79	Saved Search	Pricing Review Process
Credit Hold Review Review Search 135	Saved Search	Credit Hold Review
Shipping Exception Alerts Review Search 191	Saved Search	Shipping Exception Alerts
Renewal Opportunity Routing Review Search 247	Saved Search	Renewal Opportunity Routing
Customer Credit Recheck Review Search 303	Saved Search	Customer Credit Recheck
Serialized Item Compliance Client	Client Script	Serialized Item Compliance
Serialized Item Compliance Suitelet	Suitelet	Serialized Item Compliance

Subsidiary

Source: `Record-Types/subsidiary`

Projects**6**
Components**6**
Primary areas**Saved Searches / Scripts**

Configuration summary

Subsidiary is connected to 6 detected configuration groups and 6 directly matched components. The largest groups include Vendor Payment Release, Invoice Queue Automation, Sales Order Risk Review, Vendor Bill Exception Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Vendor Payment Release Review Search 56	Saved Search	Vendor Payment Release
Invoice Queue Automation Review Search 112	Saved Search	Invoice Queue Automation

COMPONENT	TYPE	PROJECT
Sales Order Risk Review Review Search 168	Saved Search	Sales Order Risk Review
Vendor Bill Exception Review Review Search 224	Saved Search	Vendor Bill Exception Review
Project Billing Review Review Search 280	Saved Search	Project Billing Review
Order Change Audit Map Reduce	Map/Reduce Script	Order Change Audit

Support Case

Source: `Record-Types/support-case`

Projects**7**
Components**8**
Primary areas**Saved Searches / Scripts / Workflows**

Configuration summary

Support Case is connected to 7 detected configuration groups and 8 directly matched components. The largest groups include Sales Order Risk Review, Project Billing Review, Inventory Count Reconciliation, Commission Eligibility Flags.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Sales Order Risk Review	This configuration coordinates sales order risk review for Support Case records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	2
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Warehouse Transfer Controls	This configuration coordinates warehouse transfer controls for Department records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Sales Order Risk Review Workflow	Workflow	Sales Order Risk Review
Project Billing Review Review Search 36	Saved Search	Project Billing Review
Inventory Count Reconciliation Review Search 92	Saved Search	Inventory Count Reconciliation
Commission Eligibility Flags Review Search 148	Saved Search	Commission Eligibility Flags
Warehouse Transfer Controls Review Search 204	Saved Search	Warehouse Transfer Controls
Partner Referral Tracking Review Search 260	Saved Search	Partner Referral Tracking
Sales Tax Exception Review Review Search 316	Saved Search	Sales Tax Exception Review
Sales Order Risk Review Scheduled	Scheduled Script	Sales Order Risk Review

Task

Source: `Record-Types/task`

Projects**7**
Components**9**
Primary areas**Saved Searches / Custom Lists / Scripts**

Configuration summary

Task is connected to 7 detected configuration groups and 9 directly matched components. The largest groups include Project Billing Review, Partner Referral Tracking, Sales Tax Exception Review, Customer Deposit Matching.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts / Workflows	3
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Project Billing Review Status List	Custom List	Project Billing Review
Project Billing Review Workflow	Workflow	Project Billing Review
Partner Referral Tracking Review Search 16	Saved Search	Partner Referral Tracking
Sales Tax Exception Review Review Search 72	Saved Search	Sales Tax Exception Review
Customer Deposit Matching Review Search 128	Saved Search	Customer Deposit Matching
Order Approval Workflow Review Search 184	Saved Search	Order Approval Workflow
Support Case Routing Review Search 240	Saved Search	Support Case Routing
Customer Tier Management Review Search 296	Saved Search	Customer Tier Management
Project Billing Review Scheduled	Scheduled Script	Project Billing Review

Term

Source: `Record-Types/term`

Projects**9**
Components**11**
Primary areas**Saved Searches / Custom Fields / Custom Lists**

Configuration summary

Term is connected to 9 detected configuration groups and 11 directly matched components. The largest groups include Inventory Transfer Review, Quote Expiration Monitoring, Support Intake Triage, Sales Tax Exception Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Inventory Transfer Review	This configuration coordinates inventory transfer review for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts / Workflows	3
Sales Tax Exception Review	This configuration coordinates sales tax exception review for Payment Method records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Deposit Matching	This configuration coordinates customer deposit matching for Sales Tax Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Support Case Routing	This configuration coordinates support case routing for Item Fulfillment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Employee Approval Limits	This configuration coordinates employee approval limits for Project records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Inventory Transfer Review Priority	Item Number Custom Field	Inventory Transfer Review
Quote Expiration Monitoring Review Date	Other Custom Field	Quote Expiration Monitoring
Support Intake Triage Status List	Custom List	Support Intake Triage
Support Intake Triage Workflow	Workflow	Support Intake Triage
Sales Tax Exception Review Review Search 11	Saved Search	Sales Tax Exception Review
Customer Deposit Matching Review Search 67	Saved Search	Customer Deposit Matching
Order Approval Workflow Review Search 123	Saved Search	Order Approval Workflow
Support Case Routing Review Search 179	Saved Search	Support Case Routing
Customer Tier Management Review Search 235	Saved Search	Customer Tier Management
Employee Approval Limits Review Search 291	Saved Search	Employee Approval Limits
Support Intake Triage Map Reduce	Map/Reduce Script	Support Intake Triage

Transfer Order

Source: `Record-Types/transfer-order`

Projects**8**
Components**10**
Primary areas**Saved Searches / Custom Fields / Scripts**

Configuration summary

Transfer Order is connected to 8 detected configuration groups and 10 directly matched components. The largest groups include Invoice Queue Automation, Inventory Reorder Alerts, Quote Expiration Monitoring, Vendor Onboarding Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Invoice Queue Automation	This configuration coordinates invoice queue automation for Purchase Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	2
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Invoice Delivery Preferences	This configuration coordinates invoice delivery preferences for Class records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Forecast Adjustment Review	This configuration coordinates forecast adjustment review for Non-inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Invoice Queue Automation Approval Level	Item Number Custom Field	Invoice Queue Automation
Inventory Reorder Alerts Owner	Item Option Custom Field	Inventory Reorder Alerts
Quote Expiration Monitoring Workflow	Workflow	Quote Expiration Monitoring
Vendor Onboarding Review Review Search 15	Saved Search	Vendor Onboarding Review
Invoice Delivery Preferences Review Search 71	Saved Search	Invoice Delivery Preferences
Forecast Adjustment Review Review Search 127	Saved Search	Forecast Adjustment Review
Support Intake Triage Review Search 183	Saved Search	Support Intake Triage
Vendor Payment Release Review Search 239	Saved Search	Vendor Payment Release
Invoice Queue Automation Review Search 295	Saved Search	Invoice Queue Automation
Quote Expiration Monitoring Map Reduce	Map/Reduce Script	Quote Expiration Monitoring

Vendor

Source: `Record-Types/vendor`

Projects**16**
Components**26**
Primary areas**Scripts / Saved Searches / Custom Lists**

Configuration summary

Vendor is connected to 16 detected configuration groups and 26 directly matched components. The largest groups include Payment Application Review, Case Follow-up Reminder, Order Approval Workflow, Inventory Reorder Alerts.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Lists / Scripts	2
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Lists	3
Order Approval Workflow	This configuration coordinates order approval workflow for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Records	3
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	3
Item Fulfillment Controls	This configuration coordinates item fulfillment controls for Estimate records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Backorder Review Queue	This configuration coordinates backorder review queue for Opportunity records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Fulfillment Hold Automation	This configuration coordinates fulfillment hold automation for Phone Call records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Customer Duplicate Review	This configuration coordinates customer duplicate review for Price Level records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	2
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Shipping Exception Alerts	This configuration coordinates shipping exception alerts for Lead records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1
Expense Approval Routing	This configuration coordinates expense approval routing for Campaign records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Payment Application Review Status List	Custom List	Payment Application Review
Case Follow-up Reminder Status List	Custom List	Case Follow-up Reminder

COMPONENT	TYPE	PROJECT
Approval Matrix	Custom Record Type	Order Approval Workflow
Inventory Reorder Alerts Workflow	Workflow	Inventory Reorder Alerts
Item Fulfillment Controls Review Search 24	Saved Search	Item Fulfillment Controls
Backorder Review Queue Review Search 80	Saved Search	Backorder Review Queue
Fulfillment Hold Automation Review Search 136	Saved Search	Fulfillment Hold Automation
Purchase Price Variance Review Review Search 192	Saved Search	Purchase Price Variance Review
Item Master Governance Review Search 248	Saved Search	Item Master Governance
Customer Duplicate Review Review Search 304	Saved Search	Customer Duplicate Review
Purchase Request Approval Client	Client Script	Purchase Request Approval
Vendor Onboarding Review Client	Client Script	Vendor Onboarding Review
Vendor Payment Release User Event	User Event Script	Vendor Payment Release
Case Follow-up Reminder User Event	User Event Script	Case Follow-up Reminder
Order Approval Workflow User Event	User Event Script	Order Approval Workflow
Inventory Reorder Alerts User Event	User Event Script	Inventory Reorder Alerts
Payment Application Review User Event	User Event Script	Payment Application Review
Shipping Method Validation Map Reduce	Map/Reduce Script	Shipping Method Validation
Shipping Exception Alerts Scheduled	Scheduled Script	Shipping Exception Alerts
Expense Approval Routing Scheduled	Scheduled Script	Expense Approval Routing
Purchase Request Approval Suitelet	Suitelet	Purchase Request Approval
Vendor Onboarding Review RESTlet	RESTlet	Vendor Onboarding Review
Vendor Payment Release RESTlet	RESTlet	Vendor Payment Release
Case Follow-up Reminder RESTlet	RESTlet	Case Follow-up Reminder
Order Approval Workflow Portlet	Portlet Script	Order Approval Workflow
Inventory Reorder Alerts Portlet	Portlet Script	Inventory Reorder Alerts

Vendor Bill

Source: `Record-Types/vendor-bill`

Projects**6**
Components**9**
Primary areas**Saved Searches / Scripts / Custom Segments**

Configuration summary

Vendor Bill is connected to 6 detected configuration groups and 9 directly matched components. The largest groups include Return Authorization Processing, Sales Rep Assignment Rules, Quote Approval Matrix, Journal Approval Controls.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Return Authorization Processing	This configuration coordinates return authorization processing for Vendor Bill records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Segments / Workflows	4
Sales Rep Assignment Rules	This configuration coordinates sales rep assignment rules for Customer Deposit records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Quote Approval Matrix	This configuration coordinates quote approval matrix for Bin records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Journal Approval Controls	This configuration coordinates journal approval controls for Partner records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Item Fulfillment Labeling	This configuration coordinates item fulfillment labeling for Billing Schedule records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Demo Channel	Custom Segment	Return Authorization Processing
Return Authorization Processing Workflow	Workflow	Return Authorization Processing

COMPONENT	TYPE	PROJECT
Sales Rep Assignment Rules Review Search 48	Saved Search	Sales Rep Assignment Rules
Quote Approval Matrix Review Search 104	Saved Search	Quote Approval Matrix
Journal Approval Controls Review Search 160	Saved Search	Journal Approval Controls
Price Level Governance Review Search 216	Saved Search	Price Level Governance
Item Fulfillment Labeling Review Search 272	Saved Search	Item Fulfillment Labeling
Return Authorization Processing Client	Client Script	Return Authorization Processing
Return Authorization Processing Suitelet	Suitelet	Return Authorization Processing

Vendor Payment

Source: `Record-Types/vendor-payment`

Projects**6**
Components**6**
Primary areas**Saved Searches / Scripts**

Configuration summary

Vendor Payment is connected to 6 detected configuration groups and 6 directly matched components. The largest groups include Customer Onboarding Controls, Purchase Request Approval, Quote Expiration Monitoring, Tax Code Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Customer Onboarding Controls	This configuration coordinates customer onboarding controls for Customer records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Quote Expiration Monitoring	This configuration coordinates quote expiration monitoring for Transfer Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Tax Code Review	This configuration coordinates tax code review for Calendar Event records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Drop Ship Coordination	This configuration coordinates drop ship coordination for Customer Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Purchase Price Variance Review	This configuration coordinates purchase price variance review for Vendor Payment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts	1

Components

COMPONENT	TYPE	PROJECT
Customer Onboarding Controls Review Search 40	Saved Search	Customer Onboarding Controls
Purchase Request Approval Review Search 96	Saved Search	Purchase Request Approval

COMPONENT	TYPE	PROJECT
Quote Expiration Monitoring Review Search 152	Saved Search	Quote Expiration Monitoring
Tax Code Review Review Search 208	Saved Search	Tax Code Review
Drop Ship Coordination Review Search 264	Saved Search	Drop Ship Coordination
Purchase Price Variance Review User Event	User Event Script	Purchase Price Variance Review

Vendor Return

Source: `Record-Types/vendor-return`

Projects**20**
Components**23**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Vendor Return is connected to 20 detected configuration groups and 23 directly matched components. The largest groups include Purchase Request Approval, Renewal Opportunity Routing, Service Case SLA Tracking, Support Intake Triage.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Purchase Request Approval	This configuration coordinates purchase request approval for Employee records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Renewal Opportunity Routing	This configuration coordinates renewal opportunity routing for Expense Report records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Support Intake Triage	This configuration coordinates support intake triage for Term records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Case Escalation Management	This configuration coordinates case escalation management for Journal Entry records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Warehouse Transfer Controls	This configuration coordinates warehouse transfer controls for Department records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Order Change Audit	This configuration coordinates order change audit for Subsidiary records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Pricing Review Process	This configuration coordinates pricing review process for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Price Level Governance	This configuration coordinates price level governance for Serialized Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Credit Hold Review	This configuration coordinates credit hold review for Return Authorization records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Payment Application Review	This configuration coordinates payment application review for Cash Sale records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Workflows	2

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Inventory Count Reconciliation	This configuration coordinates inventory count reconciliation for Credit Memo records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Purchase Request Approval Status	Transaction Body Custom Field	Purchase Request Approval
Renewal Opportunity Routing Exception Flag	Transaction Body Custom Field	Renewal Opportunity Routing
Service Case SLA Tracking Review Date	Transaction Body Custom Field	Service Case SLA Tracking
Support Intake Triage Priority	Transaction Body Custom Field	Support Intake Triage
Inventory Reorder Alerts Status	Transaction Body Custom Field	Inventory Reorder Alerts
Item Margin Guardrails Exception Flag	Transaction Body Custom Field	Item Margin Guardrails
Case Escalation Management Review Date	Transaction Column Custom Field	Case Escalation Management
Warehouse Transfer Controls Priority	Transaction Column Custom Field	Warehouse Transfer Controls
Order Change Audit Status	Transaction Column Custom Field	Order Change Audit
Pricing Review Process Exception Flag	Transaction Column Custom Field	Pricing Review Process
Project Billing Review Owner	Entity Custom Field	Project Billing Review
Item Master Governance Approval Level	Entity Custom Field	Item Master Governance
Price Level Governance Routing Group	Entity Custom Field	Price Level Governance

COMPONENT	TYPE	PROJECT
Credit Hold Review Routing Group	Item Custom Field	Credit Hold Review
Payment Application Review Hold Reason	Item Custom Field	Payment Application Review
Shipping Method Validation Hold Reason	CRM Custom Field	Shipping Method Validation
Vendor Onboarding Review Workflow	Workflow	Vendor Onboarding Review
Vendor Bill Exception Review Review Search 41	Saved Search	Vendor Bill Exception Review
Project Billing Review Review Search 97	Saved Search	Project Billing Review
Inventory Count Reconciliation Review Search 153	Saved Search	Inventory Count Reconciliation
Commission Eligibility Flags Review Search 209	Saved Search	Commission Eligibility Flags
Warehouse Transfer Controls Review Search 265	Saved Search	Warehouse Transfer Controls
Vendor Onboarding Review Map Reduce	Map/Reduce Script	Vendor Onboarding Review

Work Order

Source: `Record-Types/work-order`

Projects**21**
Components**26**
Primary areas**Custom Fields / Saved Searches / Scripts**

Configuration summary

Work Order is connected to 21 detected configuration groups and 26 directly matched components. The largest groups include Inventory Reorder Alerts, Item Margin Guardrails, Commission Eligibility Flags, Cash Sale Exception Review.

Projects on this record type

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Inventory Reorder Alerts	This configuration coordinates inventory reorder alerts for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Margin Guardrails	This configuration coordinates item margin guardrails for Contact records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Commission Eligibility Flags	This configuration coordinates commission eligibility flags for Sales Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Cash Sale Exception Review	This configuration coordinates cash sale exception review for Assembly Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Case Follow-up Reminder	This configuration coordinates case follow-up reminder for Vendor records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Tier Management	This configuration coordinates customer tier management for Work Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Scripts / Custom Fields / Workflows	4
Vendor Onboarding Review	This configuration coordinates vendor onboarding review for Vendor Return records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Billing Schedule Monitor	This configuration coordinates billing schedule monitor for Kit Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Demo Core Utilities	This configuration coordinates demo core utilities for Inventory Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Vendor Bill Exception Review	This configuration coordinates vendor bill exception review for Assembly Build records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Customer Credit Recheck	This configuration coordinates customer credit recheck for Purchase Requisition records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Campaign Response Routing	This configuration coordinates campaign response routing for Prospect records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields / Saved Searches	2
Vendor Payment Release	This configuration coordinates vendor payment release for Sales Order records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Vendor Compliance Checks	This configuration coordinates vendor compliance checks for Invoice records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Project Billing Review	This configuration coordinates project billing review for Task records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Item Master Governance	This configuration coordinates item master governance for Inventory Adjustment records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1
Partner Referral Tracking	This configuration coordinates partner referral tracking for Service Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Custom Fields	1

PROJECT	DESCRIPTION	AREAS	DIRECT MATCHES
Revenue Recognition Review	This configuration coordinates revenue recognition review for Item Receipt records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Service Case SLA Tracking	This configuration coordinates service case sla tracking for Location records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Shipping Method Validation	This configuration coordinates shipping method validation for Lot Numbered Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1
Serialized Item Compliance	This configuration coordinates serialized item compliance for Shipping Item records. It connects fields, searches, scripts, and workflow rules so approved users can review exceptions and keep the process moving.	Saved Searches	1

Components

COMPONENT	TYPE	PROJECT
Inventory Reorder Alerts Hold Reason	Transaction Body Custom Field	Inventory Reorder Alerts
Item Margin Guardrails Owner	Transaction Body Custom Field	Item Margin Guardrails
Commission Eligibility Flags Approval Level	Transaction Body Custom Field	Commission Eligibility Flags
Cash Sale Exception Review Routing Group	Transaction Body Custom Field	Cash Sale Exception Review
Case Follow-up Reminder Hold Reason	Transaction Body Custom Field	Case Follow-up Reminder
Customer Tier Management Owner	Transaction Body Custom Field	Customer Tier Management
Vendor Onboarding Review Routing Group	Transaction Column Custom Field	Vendor Onboarding Review
Billing Schedule Monitor Hold Reason	Transaction Column Custom Field	Billing Schedule Monitor
Demo Core Utilities Owner	Transaction Column Custom Field	Demo Core Utilities
Vendor Bill Exception Review Approval Level	Transaction Column Custom Field	Vendor Bill Exception Review

COMPONENT	TYPE	PROJECT
Customer Credit Recheck Priority	Entity Custom Field	Customer Credit Recheck
Campaign Response Routing Status	Entity Custom Field	Campaign Response Routing
Vendor Payment Release Exception Flag	Entity Custom Field	Vendor Payment Release
Vendor Compliance Checks Status	Item Custom Field	Vendor Compliance Checks
Project Billing Review Exception Flag	Item Custom Field	Project Billing Review
Item Master Governance Review Date	Item Custom Field	Item Master Governance
Partner Referral Tracking Exception Flag	CRM Custom Field	Partner Referral Tracking
Customer Tier Management Workflow	Workflow	Customer Tier Management
Revenue Recognition Review Review Search 37	Saved Search	Revenue Recognition Review
Service Case SLA Tracking Review Search 93	Saved Search	Service Case SLA Tracking
Campaign Response Routing Review Search 149	Saved Search	Campaign Response Routing
Shipping Method Validation Review Search 205	Saved Search	Shipping Method Validation
Serialized Item Compliance Review Search 261	Saved Search	Serialized Item Compliance
Demo Core Utilities Review Search 317	Saved Search	Demo Core Utilities
Customer Tier Management Client	Client Script	Customer Tier Management
Customer Tier Management Suitelet	Suitelet	Customer Tier Management

SECTION

Scripts

Script records and generated script summaries.

189 documents

Scripts contents

Script records and generated script summaries.

DOCUMENT	SOURCE
Drop Ship Coordination Bundle Installation ↗	Scripts/Bundle-Installation-Script/customscript_demo_backorder_review_queue_bundle_install_04
Fulfillment Hold Automation Bundle Installation ↗	Scripts/Bundle-Installation-Script/customscript_demo_customer_tier_management_bundle_install_03
Customer Credit Recheck Bundle Installation ↗	Scripts/Bundle-Installation-Script/customscript_demo_item_fulfillment_controls_bundle_install_02
Forecast Adjustment Review Bundle Installation ↗	Scripts/Bundle-Installation-Script/customscript_demo_support_case_routing_bundle_install_01
Customer Duplicate Review Client ↗	Scripts/Client-Script/customscript_demo_backorder_review_queue_client_06
Inventory Transfer Review Client ↗	Scripts/Client-Script/customscript_demo_campaign_response_routing_client_15
Expense Approval Routing Client ↗	Scripts/Client-Script/customscript_demo_case_escalation_management_client_29
Demo Core Utilities Client ↗	Scripts/Client-Script/customscript_demo_cash_sale_exception_review_client_16
Inventory Count Reconciliation Client ↗	Scripts/Client-Script/customscript_demo_customer_duplicate_review_client_14
Drop Ship Coordination Client ↗	Scripts/Client-Script/customscript_demo_customer_onboarding_controls_client_22
Customer Duplicate Review Client ↗	Scripts/Client-Script/customscript_demo_customer_tier_management_client_05
Demo Core Utilities Client ↗	Scripts/Client-Script/customscript_demo_demo_core_utilities_client_21
Customer Tier Management Client ↗	Scripts/Client-Script/customscript_demo_drop_ship_coordination_client_30
Payment Application Review Client ↗	Scripts/Client-Script/customscript_demo_employee_approval_limits_client_07
Customer Deposit Matching Client ↗	Scripts/Client-Script/customscript_demo_fulfillment_hold_automation_client_08
Drop Ship Coordination Client ↗	Scripts/Client-Script/customscript_demo_inventory_reorder_alerts_client_02
Customer Deposit Matching Client ↗	Scripts/Client-Script/customscript_demo_inventory_transfer_review_client_20

DOCUMENT	SOURCE
Customer Deposit Matching Client ↗	Scripts/Client-Script/customscript_demo_invoice_delivery_preferences_client_34
Customer Credit Recheck Client ↗	Scripts/Client-Script/customscript_demo_item_fulfillment_controls_client_04
Journal Approval Controls Client ↗	Scripts/Client-Script/customscript_demo_item_margin_guardrails_client_27
Renewal Opportunity Routing Client ↗	Scripts/Client-Script/customscript_demo_item_master_governance_client_12
Customer Tier Management Client ↗	Scripts/Client-Script/customscript_demo_journal_approval_controls_client_35
Renewal Opportunity Routing Client ↗	Scripts/Client-Script/customscript_demo_order_approval_workflow_client_01
Employee Approval Limits Client ↗	Scripts/Client-Script/customscript_demo_order_change_audit_client_18
Employee Approval Limits Client ↗	Scripts/Client-Script/customscript_demo_payment_application_review_client_09
Customer Deposit Matching Client ↗	Scripts/Client-Script/customscript_demo_purchase_price_variance_review_client_10
Expense Approval Routing Client ↗	Scripts/Client-Script/customscript_demo_purchase_request_approval_client_24
Inventory Transfer Review Client ↗	Scripts/Client-Script/customscript_demo_quote_approval_matrix_client_33
Expense Approval Routing Client ↗	Scripts/Client-Script/customscript_demo_quote_expiration_monitoring_client_26
Customer Credit Recheck Client ↗	Scripts/Client-Script/customscript_demo_return_authorization_processing_client_25
Payment Application Review Client ↗	Scripts/Client-Script/customscript_demo_revenue_recognition_review_client_11
Purchase Price Variance Review Client ↗	Scripts/Client-Script/customscript_demo_sales_rep_assignment_rules_client_31
Item Master Governance Client ↗	Scripts/Client-Script/customscript_demo_serialized_item_compliance_client_19
Quote Expiration Monitoring Client ↗	Scripts/Client-Script/customscript_demo_service_case_sla_tracking_client_13
Employee Approval Limits Client ↗	Scripts/Client-Script/customscript_demo_shipping_method_validation_client_17
Drop Ship Coordination Client ↗	Scripts/Client-Script/customscript_demo_support_case_routing_client_03

DOCUMENT	SOURCE
Customer Credit Recheck Client ↗	Scripts/Client-Script/customscript_demo_tax_code_review_client_28
Employee Approval Limits Client ↗	Scripts/Client-Script/customscript_demo_vendor_compliance_checks_client_23
Item Margin Guardrails Client ↗	Scripts/Client-Script/customscript_demo_vendor_onboarding_review_client_32
Customer Tier Management Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_campaign_response_routing_map_reduce_01
Expense Approval Routing Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_case_escalation_management_map_reduce_15
Customer Deposit Matching Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_case_follow_up_reminder_map_reduce_27
Demo Core Utilities Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_cash_sale_exception_review_map_reduce_02
Customer Tier Management Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_customer_onboarding_controls_map_reduce_08
Employee Approval Limits Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_demo_core_utilities_map_reduce_07
Quote Approval Matrix Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_drop_ship_coordination_map_reduce_16
Invoice Delivery Preferences Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_forecast_adjustment_review_map_reduce_22
Demo Core Utilities Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_inventory_transfer_review_map_reduce_06
Order Change Audit Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_invoice_delivery_preferences_map_reduce_20
Quote Expiration Monitoring Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_invoice_queue_automation_map_reduce_28
Purchase Order Closeout Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_item_fulfillment_labeling_map_reduce_25
Customer Tier Management Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_item_margin_guardrails_map_reduce_13
Item Fulfillment Controls Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_journal_approval_controls_map_reduce_21
Customer Credit Recheck Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_order_change_audit_map_reduce_04
Quote Approval Matrix Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_price_level_governance_map_reduce_23

DOCUMENT	SOURCE
Demo Core Utilities Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_purchase_request_approval_map_reduce_10
Fulfillment Hold Automation Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_quote_approval_matrix_map_reduce_19
Item Fulfillment Controls Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_quote_expiration_monitoring_map_reduce_12
Employee Approval Limits Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_return_authorization_processing_map_reduce_11
Expense Approval Routing Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_sales_rep_assignment_rules_map_reduce_17
Invoice Delivery Preferences Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_serialized_item_compliance_map_reduce_05
Customer Deposit Matching Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_shipping_method_validation_map_reduce_03
Project Billing Review Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_support_intake_triage_map_reduce_24
Customer Credit Recheck Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_tax_code_review_map_reduce_14
Inventory Count Reconciliation Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_vendor_compliance_checks_map_reduce_09
Expense Approval Routing Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_vendor_onboarding_review_map_reduce_18
Order Change Audit Map Reduce ↗	Scripts/Map-Reduce-Script/customscript_demo_vendor_payment_release_map_reduce_26
Customer Deposit Matching Portlet ↗	Scripts/Portlet-Script/customscript_demo_customer_deposit_matching_portlet_03
Customer Credit Recheck Portlet ↗	Scripts/Portlet-Script/customscript_demo_inventory_reorder_alerts_portlet_06
Customer Deposit Matching Portlet ↗	Scripts/Portlet-Script/customscript_demo_order_approval_workflow_portlet_05
Customer Tier Management Portlet ↗	Scripts/Portlet-Script/customscript_demo_project_task_assignment_portlet_04
Partner Referral Tracking Portlet ↗	Scripts/Portlet-Script/customscript_demo_purchase_order_closeout_portlet_02
Item Fulfillment Labeling Portlet ↗	Scripts/Portlet-Script/customscript_demo_sales_tax_exception_review_portlet_01

DOCUMENT	SOURCE
Customer Tier Management RESTlet ↗	Scripts/RESTlet/customscript_demo_case_escalation_management_restlet_04
Price Level Governance RESTlet ↗	Scripts/RESTlet/customscript_demo_case_follow_up_reminder_restlet_16
Return Authorization Processing RESTlet ↗	Scripts/RESTlet/customscript_demo_drop_ship_coordination_restlet_05
Drop Ship Coordination RESTlet ↗	Scripts/RESTlet/customscript_demo_forecast_adjustment_review_restlet_11
Order Change Audit RESTlet ↗	Scripts/RESTlet/customscript_demo_invoice_delivery_preferences_restlet_09
Purchase Order Closeout RESTlet ↗	Scripts/RESTlet/customscript_demo_invoice_queue_automation_restlet_17
Customer Deposit Matching RESTlet ↗	Scripts/RESTlet/customscript_demo_item_fulfillment_labeling_restlet_14
Journal Approval Controls RESTlet ↗	Scripts/RESTlet/customscript_demo_item_margin_guardrails_restlet_02
Customer Duplicate Review RESTlet ↗	Scripts/RESTlet/customscript_demo_journal_approval_controls_restlet_10
Price Level Governance RESTlet ↗	Scripts/RESTlet/customscript_demo_price_level_governance_restlet_12
Purchase Price Variance Review RESTlet ↗	Scripts/RESTlet/customscript_demo_pricing_review_process_restlet_18
Project Billing Review RESTlet ↗	Scripts/RESTlet/customscript_demo_quote_approval_matrix_restlet_08
Customer Tier Management RESTlet ↗	Scripts/RESTlet/customscript_demo_quote_expiration_monitoring_restlet_01
Customer Duplicate Review RESTlet ↗	Scripts/RESTlet/customscript_demo_sales_rep_assignment_rules_restlet_06
Purchase Order Closeout RESTlet ↗	Scripts/RESTlet/customscript_demo_support_intake_triage_restlet_13
Forecast Adjustment Review RESTlet ↗	Scripts/RESTlet/customscript_demo_tax_code_review_restlet_03
Inventory Transfer Review RESTlet ↗	Scripts/RESTlet/customscript_demo_vendor_onboarding_review_restlet_07
Customer Deposit Matching RESTlet ↗	Scripts/RESTlet/customscript_demo_vendor_payment_release_restlet_15
Employee Approval Limits Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_billing_schedule_monitor_scheduled_15
Inventory Transfer Review Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_commission_eligibility_flags_scheduled_10
Project Task Assignment Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_contract_renewal_alerts_scheduled_11

DOCUMENT	SOURCE
Invoice Delivery Preferences Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_credit_hold_review_scheduled_03
Employee Approval Limits Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_customer_credit_recheck_scheduled_09
Item Fulfillment Labeling Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_customer_deposit_matching_scheduled_18
Customer Credit Recheck Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_expense_approval_routing_scheduled_13
Inventory Count Reconciliation Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_inventory_count_reconciliation_scheduled_08
Inventory Count Reconciliation Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_inventory_reorder_alerts_scheduled_21
Return Authorization Processing Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_order_approval_workflow_scheduled_20
Item Fulfillment Controls Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_partner_referral_tracking_scheduled_14
Item Master Governance Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_pricing_review_process_scheduled_01
Expense Approval Routing Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_project_billing_review_scheduled_06
Drop Ship Coordination Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_project_task_assignment_scheduled_19
Customer Duplicate Review Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_purchase_order_closeout_scheduled_17
Customer Deposit Matching Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_renewal_opportunity_routing_scheduled_07
Demo Core Utilities Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_sales_order_risk_review_scheduled_02
Demo Core Utilities Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_sales_tax_exception_review_scheduled_16
Item Master Governance Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_shipping_exception_alerts_scheduled_05
Demo Core Utilities Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_support_case_routing_scheduled_22
Drop Ship Coordination Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_vendor_bill_exception_review_scheduled_04
Invoice Delivery Preferences Scheduled ↗	Scripts/Scheduled-Script/customscript_demo_warehouse_transfer_controls_scheduled_12

DOCUMENT	SOURCE
Forecast Adjustment Review Suitelet ↗	Scripts/Suitelet/customscript_demo_backorder_review_queue_suitelet_03
Customer Duplicate Review Suitelet ↗	Scripts/Suitelet/customscript_demo_campaign_response_routing_suitelet_12
Fulfillment Hold Automation Suitelet ↗	Scripts/Suitelet/customscript_demo_cash_sale_exception_review_suitelet_13
Fulfillment Hold Automation Suitelet ↗	Scripts/Suitelet/customscript_demo_customer_duplicate_review_suitelet_11
Forecast Adjustment Review Suitelet ↗	Scripts/Suitelet/customscript_demo_customer_onboarding_controls_suitelet_19
Demo Core Utilities Suitelet ↗	Scripts/Suitelet/customscript_demo_customer_tier_management_suitelet_02
Quote Approval Matrix Suitelet ↗	Scripts/Suitelet/customscript_demo_demo_core_utilities_suitelet_18
Employee Approval Limits Suitelet ↗	Scripts/Suitelet/customscript_demo_employee_approval_limits_suitelet_04
Customer Duplicate Review Suitelet ↗	Scripts/Suitelet/customscript_demo_fulfillment_hold_automation_suitelet_05
Item Fulfillment Controls Suitelet ↗	Scripts/Suitelet/customscript_demo_inventory_transfer_review_suitelet_17
Customer Duplicate Review Suitelet ↗	Scripts/Suitelet/customscript_demo_item_fulfillment_controls_suitelet_01
Invoice Delivery Preferences Suitelet ↗	Scripts/Suitelet/customscript_demo_item_master_governance_suitelet_09
Item Fulfillment Controls Suitelet ↗	Scripts/Suitelet/customscript_demo_order_change_audit_suitelet_15
Customer Duplicate Review Suitelet ↗	Scripts/Suitelet/customscript_demo_payment_application_review_suitelet_06
Expense Approval Routing Suitelet ↗	Scripts/Suitelet/customscript_demo_purchase_price_variance_review_suitelet_07
Order Change Audit Suitelet ↗	Scripts/Suitelet/customscript_demo_purchase_request_approval_suitelet_21
Payment Application Review Suitelet ↗	Scripts/Suitelet/customscript_demo_return_authorization_processing_suitelet_22
Demo Core Utilities Suitelet ↗	Scripts/Suitelet/customscript_demo_revenue_recognition_review_suitelet_08
Price Level Governance Suitelet ↗	Scripts/Suitelet/customscript_demo_serialized_item_compliance_suitelet_16

DOCUMENT	SOURCE
Customer Tier Management Suitelet ↗	Scripts/Suitelet/customscript_demo_service_case_sla_tracking_suitelet_10
Customer Credit Recheck Suitelet ↗	Scripts/Suitelet/customscript_demo_shipping_method_validation_suitelet_14
Inventory Count Reconciliation Suitelet ↗	Scripts/Suitelet/customscript_demo_vendor_compliance_checks_suitelet_20
Employee Approval Limits User Event ↗	Scripts/User-Event-Script/customscript_demo_backorder_review_queue_user_event_32
Forecast Adjustment Review User Event ↗	Scripts/User-Event-Script/customscript_demo_billing_schedule_monitor_user_event_22
Customer Tier Management User Event ↗	Scripts/User-Event-Script/customscript_demo_case_follow_up_reminder_user_event_06
Journal Approval Controls User Event ↗	Scripts/User-Event-Script/customscript_demo_commission_eligibility_flags_user_event_17
Customer Duplicate Review User Event ↗	Scripts/User-Event-Script/customscript_demo_contract_renewal_alerts_user_event_18
Customer Deposit Matching User Event ↗	Scripts/User-Event-Script/customscript_demo_credit_hold_review_user_event_10
Drop Ship Coordination User Event ↗	Scripts/User-Event-Script/customscript_demo_customer_credit_recheck_user_event_16
Project Task Assignment User Event ↗	Scripts/User-Event-Script/customscript_demo_customer_deposit_matching_user_event_25
Item Master Governance User Event ↗	Scripts/User-Event-Script/customscript_demo_customer_duplicate_review_user_event_40
Customer Credit Recheck User Event ↗	Scripts/User-Event-Script/customscript_demo_customer_tier_management_user_event_31
Customer Tier Management User Event ↗	Scripts/User-Event-Script/customscript_demo_employee_approval_limits_user_event_33
Demo Core Utilities User Event ↗	Scripts/User-Event-Script/customscript_demo_expense_approval_routing_user_event_20
Item Margin Guardrails User Event ↗	Scripts/User-Event-Script/customscript_demo_forecast_adjustment_review_user_event_01
Customer Credit Recheck User Event ↗	Scripts/User-Event-Script/customscript_demo_fulfillment_hold_automation_user_event_34
Project Task Assignment User Event ↗	Scripts/User-Event-Script/customscript_demo_inventory_count_reconciliation_user_event_15

DOCUMENT	SOURCE
Renewal Opportunity Routing User Event ↗	Scripts/User-Event-Script/customscript_demo_inventory_reorder_alerts_user_event_28
Journal Approval Controls User Event ↗	Scripts/User-Event-Script/customscript_demo_invoice_queue_automation_user_event_07
Expense Approval Routing User Event ↗	Scripts/User-Event-Script/customscript_demo_item_fulfillment_controls_user_event_30
Customer Deposit Matching User Event ↗	Scripts/User-Event-Script/customscript_demo_item_fulfillment_labeling_user_event_04
Drop Ship Coordination User Event ↗	Scripts/User-Event-Script/customscript_demo_item_master_governance_user_event_38
Demo Core Utilities User Event ↗	Scripts/User-Event-Script/customscript_demo_order_approval_workflow_user_event_27
Customer Deposit Matching User Event ↗	Scripts/User-Event-Script/customscript_demo_partner_referral_tracking_user_event_21
Customer Duplicate Review User Event ↗	Scripts/User-Event-Script/customscript_demo_payment_application_review_user_event_35
Customer Duplicate Review User Event ↗	Scripts/User-Event-Script/customscript_demo_price_level_governance_user_event_02
Customer Tier Management User Event ↗	Scripts/User-Event-Script/customscript_demo_pricing_review_process_user_event_08
Employee Approval Limits User Event ↗	Scripts/User-Event-Script/customscript_demo_project_billing_review_user_event_13
Employee Approval Limits User Event ↗	Scripts/User-Event-Script/customscript_demo_project_task_assignment_user_event_26
Item Margin Guardrails User Event ↗	Scripts/User-Event-Script/customscript_demo_purchase_order_closeout_user_event_24
Customer Credit Recheck User Event ↗	Scripts/User-Event-Script/customscript_demo_purchase_price_variance_review_user_event_36
Fulfillment Hold Automation User Event ↗	Scripts/User-Event-Script/customscript_demo_renewal_opportunity_routing_user_event_14
Forecast Adjustment Review User Event ↗	Scripts/User-Event-Script/customscript_demo_revenue_recognition_review_user_event_37
Fulfillment Hold Automation User Event ↗	Scripts/User-Event-Script/customscript_demo_sales_order_risk_review_user_event_09
Drop Ship Coordination User Event ↗	Scripts/User-Event-Script/customscript_demo_sales_tax_exception_review_user_event_23

DOCUMENT	SOURCE
Inventory Transfer Review User Event ↗	Scripts/User-Event-Script/customscript_demo_service_case_sla_tracking_user_event_39
Customer Credit Recheck User Event ↗	Scripts/User-Event-Script/customscript_demo_shipping_exception_alerts_user_event_12
Customer Duplicate Review User Event ↗	Scripts/User-Event-Script/customscript_demo_support_case_routing_user_event_29
Item Fulfillment Labeling User Event ↗	Scripts/User-Event-Script/customscript_demo_support_intake_triage_user_event_03
Expense Approval Routing User Event ↗	Scripts/User-Event-Script/customscript_demo_vendor_bill_exception_review_user_event_11
Customer Credit Recheck User Event ↗	Scripts/User-Event-Script/customscript_demo_vendor_payment_release_user_event_05
Customer Duplicate Review User Event ↗	Scripts/User-Event-Script/customscript_demo_warehouse_transfer_controls_user_event_19
Project Billing Review Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_billing_schedule_monitor_workflow_action_14
Item Margin Guardrails Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_commission_eligibility_flags_workflow_action_09
Demo Core Utilities Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_contract_renewal_alerts_workflow_action_10
Customer Tier Management Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_credit_hold_review_workflow_action_02
Partner Referral Tracking Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_customer_credit_recheck_workflow_action_08
Quote Expiration Monitoring Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_expense_approval_routing_workflow_action_12
Drop Ship Coordination Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_inventory_count_reconciliation_workflow_action_07
Expense Approval Routing Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_partner_referral_tracking_workflow_action_13
Item Fulfillment Labeling Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_project_billing_review_workflow_action_05
Purchase Price Variance Review Workflow Action ↗	Scripts/Workflow-Action-Script/customscript_demo_renewal_opportunity_routing_workflow_action_06

DOCUMENT	SOURCE
Customer Deposit Matching Workflow Action ↗	`Scripts/Workflow-Action-Script/customscript_demo_sales_order_risk_review_workflow_action_01`
Customer Credit Recheck Workflow Action ↗	`Scripts/Workflow-Action-Script/customscript_demo_shipping_exception_alerts_workflow_action_04`
Partner Referral Tracking Workflow Action ↗	`Scripts/Workflow-Action-Script/customscript_demo_vendor_bill_exception_review_workflow_action_03`
Drop Ship Coordination Workflow Action ↗	`Scripts/Workflow-Action-Script/customscript_demo_warehouse_transfer_controls_workflow_action_11`

Drop Ship Coordination Bundle Installation

Source: `Scripts/Bundle-Installation-Script/customscript_demo_backorder_review_queue_bundle_install_04`

Drop Ship Coordination Bundle Installation supports backorder review queue on Opportunity records.

Purpose

This script supports backorder review queue for Opportunity records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Bundle Installation Script
Deployed to	Opportunity
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the backorder review queue process.
- **opportunity** ↗ - connected through the backorder review queue process.

Fulfillment Hold Automation Bundle Installation

Source: `Scripts/Bundle-Installation-Script/customscript_demo_customer_tier_management_bundle_install_03`

Fulfillment Hold Automation Bundle Installation supports customer tier management on Sales Return records.

Purpose

This script supports customer tier management for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Bundle Installation Script
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Fulfillment Hold Automation** ↗ - connected through the customer tier management process.
- **sales-return** ↗ - connected through the customer tier management process.

Customer Credit Recheck Bundle Installation

Source: `Scripts/Bundle-Installation-Script/customscript_demo_item_fulfillment_controls_bundle_install_02`

Customer Credit Recheck Bundle Installation supports item fulfillment controls on Estimate records.

Purpose

This script supports item fulfillment controls for Estimate records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Bundle Installation Script
Deployed to	Estimate
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the item fulfillment controls process.
- **estimate** ↗ - connected through the item fulfillment controls process.

Forecast Adjustment Review Bundle Installation

Source: `Scripts/Bundle-Installation-Script/customscript_demo_support_case_routing_bundle_install_01`

Forecast Adjustment Review Bundle Installation supports support case routing on Assembly Item records.

Purpose

This script supports support case routing for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Bundle Installation Script
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Forecast Adjustment Review** ↗ - connected through the support case routing process.
- **assembly-item** ↗ - connected through the support case routing process.

Customer Duplicate Review Client

Source: `Scripts/Client-Script/customscript_demo_backorder_review_queue_client_06`

Customer Duplicate Review Client supports backorder review queue on Account records.

Purpose

This script supports backorder review queue for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the backorder review queue process.
- **account** ↗ - connected through the backorder review queue process.

Inventory Transfer Review Client

Source: `Scripts/Client-Script/customscript_demo_campaign_response_routing_client_15`

Inventory Transfer Review Client supports campaign response routing on Prospect records.

Purpose

This script supports campaign response routing for Prospect records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Prospect
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Transfer Review** ↗ - connected through the campaign response routing process.
- **prospect** ↗ - connected through the campaign response routing process.

Expense Approval Routing Client

Source: `Scripts/Client-Script/customscript_demo_case_escalation_management_client_29`

Expense Approval Routing Client supports case escalation management on Journal Entry records.

Purpose

This script supports case escalation management for Journal Entry records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Journal Entry
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the case escalation management process.
- **journal-entry** ↗ - connected through the case escalation management process.

Demo Core Utilities Client

Source: `Scripts/Client-Script/customscript_demo_cash_sale_exception_review_client_16`

Demo Core Utilities Client supports cash sale exception review on Class records.

Purpose

This script supports cash sale exception review for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the cash sale exception review process.
- **class** ↗ - connected through the cash sale exception review process.

Inventory Count Reconciliation Client

Source: `Scripts/Client-Script/customscript_demo_customer_duplicate_review_client_14`

Inventory Count Reconciliation Client supports customer duplicate review on Account records.

Purpose

This script supports customer duplicate review for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Count Reconciliation** ↗ - connected through the customer duplicate review process.
- **account** ↗ - connected through the customer duplicate review process.

Drop Ship Coordination Client

Source: `Scripts/Client-Script/customscript_demo_customer_onboarding_controls_client_22`

Drop Ship Coordination Client supports customer onboarding controls on Contact records.

Purpose

This script supports customer onboarding controls for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Contact
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the customer onboarding controls process.
- **contact** ↗ - connected through the customer onboarding controls process.

Customer Duplicate Review Client

Source: `Scripts/Client-Script/customscript_demo_customer_tier_management_client_05`

Customer Duplicate Review Client supports customer tier management on Work Order records.

Purpose

This script supports customer tier management for Work Order records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Work Order
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the customer tier management process.
- **work-order** ↗ - connected through the customer tier management process.

Demo Core Utilities Client

Source: `Scripts/Client-Script/customscript_demo_demo_core_utilities_client_21`

Demo Core Utilities Client supports demo core utilities on Inventory Item records.

Purpose

This script supports demo core utilities for Inventory Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Inventory Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the demo core utilities process.
- **inventory-item** ↗ - connected through the demo core utilities process.

Customer Tier Management Client

Source: `Scripts/Client-Script/customscript_demo_drop_ship_coordination_client_30`

Customer Tier Management Client supports drop ship coordination on Contact records.

Purpose

This script supports drop ship coordination for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the drop ship coordination process.
- **contact** ↗ - connected through the drop ship coordination process.

Payment Application Review Client

Source: `Scripts/Client-Script/customscript_demo_employee_approval_limits_client_07`

Payment Application Review Client supports employee approval limits on Project records.

Purpose

This script supports employee approval limits for Project records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Project
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Payment Application Review** ↗ - connected through the employee approval limits process.
- **project** ↗ - connected through the employee approval limits process.

Customer Deposit Matching Client

Source: `Scripts/Client-Script/customscript_demo_fulfillment_hold_automation_client_08`

Customer Deposit Matching Client supports fulfillment hold automation on Class records.

Purpose

This script supports fulfillment hold automation for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Class
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the fulfillment hold automation process.
- **class** ↗ - connected through the fulfillment hold automation process.

Drop Ship Coordination Client

Source: `Scripts/Client-Script/customscript_demo_inventory_reorder_alerts_client_02`

Drop Ship Coordination Client supports inventory reorder alerts on Cash Sale records.

Purpose

This script supports inventory reorder alerts for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the inventory reorder alerts process.
- **cash-sale** ↗ - connected through the inventory reorder alerts process.

Customer Deposit Matching Client

Source: `Scripts/Client-Script/customscript_demo_inventory_transfer_review_client_20`

Customer Deposit Matching Client supports inventory transfer review on Return Authorization records.

Purpose

This script supports inventory transfer review for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the inventory transfer review process.
- **return-authorization** ↗ - connected through the inventory transfer review process.

Customer Deposit Matching Client

Source: `Scripts/Client-Script/customscript_demo_invoice_delivery_preferences_client_34`

Customer Deposit Matching Client supports invoice delivery preferences on Assembly Item records.

Purpose

This script supports invoice delivery preferences for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the invoice delivery preferences process.
- **assembly-item** ↗ - connected through the invoice delivery preferences process.

Customer Credit Recheck Client

Source: `Scripts/Client-Script/customscript_demo_item_fulfillment_controls_client_04`

Customer Credit Recheck Client supports item fulfillment controls on Return Authorization records.

Purpose

This script supports item fulfillment controls for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the item fulfillment controls process.
- **return-authorization** ↗ - connected through the item fulfillment controls process.

Journal Approval Controls Client

Source: `Scripts/Client-Script/customscript_demo_item_margin_guardrails_client_27`

Journal Approval Controls Client supports item margin guardrails on Contact records.

Purpose

This script supports item margin guardrails for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Journal Approval Controls** ↗ - connected through the item margin guardrails process.
- **contact** ↗ - connected through the item margin guardrails process.

Renewal Opportunity Routing Client

Source: `Scripts/Client-Script/customscript_demo_item_master_governance_client_12`

Renewal Opportunity Routing Client supports item master governance on Return Authorization records.

Purpose

This script supports item master governance for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Renewal Opportunity Routing** ↗ - connected through the item master governance process.
- **return-authorization** ↗ - connected through the item master governance process.

Customer Tier Management Client

Source: `Scripts/Client-Script/customscript_demo_journal_approval_controls_client_35`

Customer Tier Management Client supports journal approval controls on Partner records.

Purpose

This script supports journal approval controls for Partner records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Partner
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the journal approval controls process.
- **partner** ↗ - connected through the journal approval controls process.

Renewal Opportunity Routing Client

Source: `Scripts/Client-Script/customscript_demo_order_approval_workflow_client_01`

Renewal Opportunity Routing Client supports order approval workflow on Sales Order records.

Purpose

This script supports order approval workflow for Sales Order records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Sales Order
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Renewal Opportunity Routing** ↗ - connected through the order approval workflow process.
- **sales-order** ↗ - connected through the order approval workflow process.

Employee Approval Limits Client

Source: `Scripts/Client-Script/customscript_demo_order_change_audit_client_18`

Employee Approval Limits Client supports order change audit on Cash Sale records.

Purpose

This script supports order change audit for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the order change audit process.
- **cash-sale** ↗ - connected through the order change audit process.

Employee Approval Limits Client

Source: `Scripts/Client-Script/customscript_demo_payment_application_review_client_09`

Employee Approval Limits Client supports payment application review on Cash Sale records.

Purpose

This script supports payment application review for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the payment application review process.
- **cash-sale** ↗ - connected through the payment application review process.

Customer Deposit Matching Client

Source: `Scripts/Client-Script/customscript_demo_purchase_price_variance_review_client_10`

Customer Deposit Matching Client supports purchase price variance review on Cash Sale records.

Purpose

This script supports purchase price variance review for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the purchase price variance review process.
- **cash-sale** ↗ - connected through the purchase price variance review process.

Expense Approval Routing Client

Source: `Scripts/Client-Script/customscript_demo_purchase_request_approval_client_24`

Expense Approval Routing Client supports purchase request approval on Vendor records.

Purpose

This script supports purchase request approval for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the purchase request approval process.
- **vendor** ↗ - connected through the purchase request approval process.

Inventory Transfer Review Client

Source: `Scripts/Client-Script/customscript_demo_quote_approval_matrix_client_33`

Inventory Transfer Review Client supports quote approval matrix on Bin records.

Purpose

This script supports quote approval matrix for Bin records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Bin
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Transfer Review** ↗ - connected through the quote approval matrix process.
- **bin** ↗ - connected through the quote approval matrix process.

Expense Approval Routing Client

Source: `Scripts/Client-Script/customscript_demo_quote_expiration_monitoring_client_26`

Expense Approval Routing Client supports quote expiration monitoring on Assembly Item records.

Purpose

This script supports quote expiration monitoring for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the quote expiration monitoring process.
- **assembly-item** ↗ - connected through the quote expiration monitoring process.

Customer Credit Recheck Client

Source: `Scripts/Client-Script/customscript_demo_return_authorization_processing_client_25`

Customer Credit Recheck Client supports return authorization processing on Vendor Bill records.

Purpose

This script supports return authorization processing for Vendor Bill records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Vendor Bill
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the return authorization processing process.
- **vendor-bill** ↗ - connected through the return authorization processing process.

Payment Application Review Client

Source: `Scripts/Client-Script/customscript_demo_revenue_recognition_review_client_11`

Payment Application Review Client supports revenue recognition review on Item Receipt records.

Purpose

This script supports revenue recognition review for Item Receipt records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Item Receipt
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Payment Application Review** ↗ - connected through the revenue recognition review process.
- **item-receipt** ↗ - connected through the revenue recognition review process.

Purchase Price Variance Review Client

Source: `Scripts/Client-Script/customscript_demo_sales_rep_assignment_rules_client_31`

Purchase Price Variance Review Client supports sales rep assignment rules on Customer Deposit records.

Purpose

This script supports sales rep assignment rules for Customer Deposit records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Customer Deposit
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Purchase Price Variance Review** ↗ - connected through the sales rep assignment rules process.
- **customer-deposit** ↗ - connected through the sales rep assignment rules process.

Item Master Governance Client

Source: `Scripts/Client-Script/customscript_demo_serialized_item_compliance_client_19`

Item Master Governance Client supports serialized item compliance on Shipping Item records.

Purpose

This script supports serialized item compliance for Shipping Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Shipping Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Master Governance** ↗ - connected through the serialized item compliance process.
- **shipping-item** ↗ - connected through the serialized item compliance process.

Quote Expiration Monitoring Client

Source: `Scripts/Client-Script/customscript_demo_service_case_sla_tracking_client_13`

Quote Expiration Monitoring Client supports service case sla tracking on Location records.

Purpose

This script supports service case sla tracking for Location records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Location
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Quote Expiration Monitoring** ↗ - connected through the service case sla tracking process.
- **location** ↗ - connected through the service case sla tracking process.

Employee Approval Limits Client

Source: `Scripts/Client-Script/customscript_demo_shipping_method_validation_client_17`

Employee Approval Limits Client supports shipping method validation on Lot Numbered Item records.

Purpose

This script supports shipping method validation for Lot Numbered Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Lot Numbered Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the shipping method validation process.
- **lot-numbered-item** ↗ - connected through the shipping method validation process.

Drop Ship Coordination Client

Source: `Scripts/Client-Script/customscript_demo_support_case_routing_client_03`

Drop Ship Coordination Client supports support case routing on Item Fulfillment records.

Purpose

This script supports support case routing for Item Fulfillment records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Item Fulfillment
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the support case routing process.
- **item-fulfillment** ↗ - connected through the support case routing process.

Customer Credit Recheck Client

Source: `Scripts/Client-Script/customscript_demo_tax_code_review_client_28`

Customer Credit Recheck Client supports tax code review on Sales Return records.

Purpose

This script supports tax code review for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the tax code review process.
- **sales-return** ↗ - connected through the tax code review process.

Employee Approval Limits Client

Source: `Scripts/Client-Script/customscript_demo_vendor_compliance_checks_client_23`

Employee Approval Limits Client supports vendor compliance checks on Invoice records.

Purpose

This script supports vendor compliance checks for Invoice records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Invoice
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the vendor compliance checks process.
- **invoice** ↗ - connected through the vendor compliance checks process.

Item Margin Guardrails Client

Source: `Scripts/Client-Script/customscript_demo_vendor_onboarding_review_client_32`

Item Margin Guardrails Client supports vendor onboarding review on Vendor records.

Purpose

This script supports vendor onboarding review for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Client Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Margin Guardrails** ↗ - connected through the vendor onboarding review process.
- **vendor** ↗ - connected through the vendor onboarding review process.

Customer Tier Management Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_campaign_response_routing_map_reduce_01`

Customer Tier Management Map Reduce supports campaign response routing on Contact records.

Purpose

This script supports campaign response routing for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the campaign response routing process.
- **contact** ↗ - connected through the campaign response routing process.

Expense Approval Routing Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_case_escalation_management_map_reduce_15`

Expense Approval Routing Map Reduce supports case escalation management on Account records.

Purpose

This script supports case escalation management for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the case escalation management process.
- **account** ↗ - connected through the case escalation management process.

Customer Deposit Matching Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_case_follow_up_reminder_map_reduce_27`

Customer Deposit Matching Map Reduce supports case follow-up reminder on Cash Sale records.

Purpose

This script supports case follow-up reminder for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the case follow-up reminder process.
- **cash-sale** ↗ - connected through the case follow-up reminder process.

Demo Core Utilities Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_cash_sale_exception_review_map_reduce_02`

Demo Core Utilities Map Reduce supports cash sale exception review on Assembly Item records.

Purpose

This script supports cash sale exception review for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the cash sale exception review process.
- **assembly-item** ↗ - connected through the cash sale exception review process.

Customer Tier Management Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_customer_onboarding_controls_map_reduce_08`

Customer Tier Management Map Reduce supports customer onboarding controls on Customer records.

Purpose

This script supports customer onboarding controls for Customer records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Customer
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the customer onboarding controls process.
- **customer** ↗ - connected through the customer onboarding controls process.

Employee Approval Limits Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_demo_core_utilities_map_reduce_07`

Employee Approval Limits Map Reduce supports demo core utilities on Sales Return records.

Purpose

This script supports demo core utilities for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the demo core utilities process.
- **sales-return** ↗ - connected through the demo core utilities process.

Quote Approval Matrix Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_drop_ship_coordination_map_reduce_16`

Quote Approval Matrix Map Reduce supports drop ship coordination on Customer Payment records.

Purpose

This script supports drop ship coordination for Customer Payment records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Customer Payment
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Quote Approval Matrix** ↗ - connected through the drop ship coordination process.
- **customer-payment** ↗ - connected through the drop ship coordination process.

Invoice Delivery Preferences Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_forecast_adjustment_review_map_reduce_22`

Invoice Delivery Preferences Map Reduce supports forecast adjustment review on Non-inventory Item records.

Purpose

This script supports forecast adjustment review for Non-inventory Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Non-inventory Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Invoice Delivery Preferences** ↗ - connected through the forecast adjustment review process.
- **non-inventory-item** ↗ - connected through the forecast adjustment review process.

Demo Core Utilities Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_inventory_transfer_review_map_reduce_06`

Demo Core Utilities Map Reduce supports inventory transfer review on Purchase Order records.

Purpose

This script supports inventory transfer review for Purchase Order records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Purchase Order
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the inventory transfer review process.
- **purchase-order** ↗ - connected through the inventory transfer review process.

Order Change Audit Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_invoice_delivery_preferences_map_reduce_20`

Order Change Audit Map Reduce supports invoice delivery preferences on Class records.

Purpose

This script supports invoice delivery preferences for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Order Change Audit** ↗ - connected through the invoice delivery preferences process.
- **class** ↗ - connected through the invoice delivery preferences process.

Quote Expiration Monitoring Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_invoice_queue_automation_map_reduce_28`

Quote Expiration Monitoring Map Reduce supports invoice queue automation on Purchase Order records.

Purpose

This script supports invoice queue automation for Purchase Order records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Purchase Order
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Quote Expiration Monitoring** ↗ - connected through the invoice queue automation process.
- **purchase-order** ↗ - connected through the invoice queue automation process.

Purchase Order Closeout Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_item_fulfillment_labeling_map_reduce_25`

Purchase Order Closeout Map Reduce supports item fulfillment labeling on Class records.

Purpose

This script supports item fulfillment labeling for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Purchase Order Closeout** ↗ - connected through the item fulfillment labeling process.
- **class** ↗ - connected through the item fulfillment labeling process.

Customer Tier Management Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_item_margin_guardrails_map_reduce_13`

Customer Tier Management Map Reduce supports item margin guardrails on Return Authorization records.

Purpose

This script supports item margin guardrails for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the item margin guardrails process.
- **return-authorization** ↗ - connected through the item margin guardrails process.

Item Fulfillment Controls Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_journal_approval_controls_map_reduce_21`

Item Fulfillment Controls Map Reduce supports journal approval controls on Return Authorization records.

Purpose

This script supports journal approval controls for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Controls** ↗ - connected through the journal approval controls process.
- **return-authorization** ↗ - connected through the journal approval controls process.

Customer Credit Recheck Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_order_change_audit_map_reduce_04`

Customer Credit Recheck Map Reduce supports order change audit on Subsidiary records.

Purpose

This script supports order change audit for Subsidiary records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Subsidiary
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the order change audit process.
- **subsidiary** ↗ - connected through the order change audit process.

Quote Approval Matrix Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_price_level_governance_map_reduce_23`

Quote Approval Matrix Map Reduce supports price level governance on Account records.

Purpose

This script supports price level governance for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Quote Approval Matrix** ↗ - connected through the price level governance process.
- **account** ↗ - connected through the price level governance process.

Demo Core Utilities Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_purchase_request_approval_map_reduce_10`

Demo Core Utilities Map Reduce supports purchase request approval on Employee records.

Purpose

This script supports purchase request approval for Employee records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Employee
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the purchase request approval process.
- **employee** ↗ - connected through the purchase request approval process.

Fulfillment Hold Automation Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_quote_approval_matrix_map_reduce_19`

Fulfillment Hold Automation Map Reduce supports quote approval matrix on Cash Sale records.

Purpose

This script supports quote approval matrix for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Fulfillment Hold Automation** ↗ - connected through the quote approval matrix process.
- **cash-sale** ↗ - connected through the quote approval matrix process.

Item Fulfillment Controls Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_quote_expiration_monitoring_map_reduce_12`

Item Fulfillment Controls Map Reduce supports quote expiration monitoring on Transfer Order records.

Purpose

This script supports quote expiration monitoring for Transfer Order records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Transfer Order
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Controls** ↗ - connected through the quote expiration monitoring process.
- **transfer-order** ↗ - connected through the quote expiration monitoring process.

Employee Approval Limits Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_return_authorization_processing_map_reduce_11`

Employee Approval Limits Map Reduce supports return authorization processing on Cash Sale records.

Purpose

This script supports return authorization processing for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the return authorization processing process.
- **cash-sale** ↗ - connected through the return authorization processing process.

Expense Approval Routing Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_sales_rep_assignment_rules_map_reduce_17`

Expense Approval Routing Map Reduce supports sales rep assignment rules on Class records.

Purpose

This script supports sales rep assignment rules for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Class
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the sales rep assignment rules process.
- **class** ↗ - connected through the sales rep assignment rules process.

Invoice Delivery Preferences Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_serialized_item_compliance_map_reduce_05`

Invoice Delivery Preferences Map Reduce supports serialized item compliance on Assembly Item records.

Purpose

This script supports serialized item compliance for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Invoice Delivery Preferences** ↗ - connected through the serialized item compliance process.
- **assembly-item** ↗ - connected through the serialized item compliance process.

Customer Deposit Matching Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_shipping_method_validation_map_reduce_03`

Customer Deposit Matching Map Reduce supports shipping method validation on Vendor records.

Purpose

This script supports shipping method validation for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Vendor
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the shipping method validation process.
- **vendor** ↗ - connected through the shipping method validation process.

Project Billing Review Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_support_intake_triage_map_reduce_24`

Project Billing Review Map Reduce supports support intake triage on Term records.

Purpose

This script supports support intake triage for Term records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Term
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Project Billing Review** ↗ - connected through the support intake triage process.
- **term** ↗ - connected through the support intake triage process.

Customer Credit Recheck Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_tax_code_review_map_reduce_14`

Customer Credit Recheck Map Reduce supports tax code review on Calendar Event records.

Purpose

This script supports tax code review for Calendar Event records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Calendar Event
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the tax code review process.
- **calendar-event** ↗ - connected through the tax code review process.

Inventory Count Reconciliation Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_vendor_compliance_checks_map_reduce_09`

Inventory Count Reconciliation Map Reduce supports vendor compliance checks on Class records.

Purpose

This script supports vendor compliance checks for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Count Reconciliation** ↗ - connected through the vendor compliance checks process.
- **class** ↗ - connected through the vendor compliance checks process.

Expense Approval Routing Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_vendor_onboarding_review_map_reduce_18`

Expense Approval Routing Map Reduce supports vendor onboarding review on Vendor Return records.

Purpose

This script supports vendor onboarding review for Vendor Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Vendor Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the vendor onboarding review process.
- **vendor-return** ↗ - connected through the vendor onboarding review process.

Order Change Audit Map Reduce

Source: `Scripts/Map-Reduce-Script/customscript_demo_vendor_payment_release_map_reduce_26`

Order Change Audit Map Reduce supports vendor payment release on Sales Order records.

Purpose

This script supports vendor payment release for Sales Order records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Map/Reduce Script
Deployed to	Sales Order
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Order Change Audit** ↗ - connected through the vendor payment release process.
- **sales-order** ↗ - connected through the vendor payment release process.

Customer Deposit Matching Portlet

Source: `Scripts/Portlet-Script/customscript_demo_customer_deposit_matching_portlet_03`

Customer Deposit Matching Portlet supports customer deposit matching on Account records.

Purpose

This script supports customer deposit matching for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Portlet Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the customer deposit matching process.
- **account** ↗ - connected through the customer deposit matching process.

Customer Credit Recheck Portlet

Source: `Scripts/Portlet-Script/customscript_demo_inventory_reorder_alerts_portlet_06`

Customer Credit Recheck Portlet supports inventory reorder alerts on Vendor records.

Purpose

This script supports inventory reorder alerts for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Portlet Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the inventory reorder alerts process.
- **vendor** ↗ - connected through the inventory reorder alerts process.

Customer Deposit Matching Portlet

Source: `Scripts/Portlet-Script/customscript_demo_order_approval_workflow_portlet_05`

Customer Deposit Matching Portlet supports order approval workflow on Vendor records.

Purpose

This script supports order approval workflow for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Portlet Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the order approval workflow process.
- **vendor** ↗ - connected through the order approval workflow process.

Customer Tier Management Portlet

Source: `Scripts/Portlet-Script/customscript_demo_project_task_assignment_portlet_04`

Customer Tier Management Portlet supports project task assignment on Customer records.

Purpose

This script supports project task assignment for Customer records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Portlet Script
Deployed to	Customer
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the project task assignment process.
- **customer** ↗ - connected through the project task assignment process.

Partner Referral Tracking Portlet

Source: `Scripts/Portlet-Script/customscript_demo_purchase_order_closeout_portlet_02`

Partner Referral Tracking Portlet supports purchase order closeout on Account records.

Purpose

This script supports purchase order closeout for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Portlet Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Partner Referral Tracking** ↗ - connected through the purchase order closeout process.
- **account** ↗ - connected through the purchase order closeout process.

Item Fulfillment Labeling Portlet

Source: `Scripts/Portlet-Script/customscript_demo_sales_tax_exception_review_portlet_01`

Item Fulfillment Labeling Portlet supports sales tax exception review on Return Authorization records.

Purpose

This script supports sales tax exception review for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Portlet Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Labeling** ↗ - connected through the sales tax exception review process.
- **return-authorization** ↗ - connected through the sales tax exception review process.

Customer Tier Management RESTlet

Source: `Scripts/RESTlet/customscript_demo_case_escalation_management_restlet_04`

Customer Tier Management RESTlet supports case escalation management on Journal Entry records.

Purpose

This script supports case escalation management for Journal Entry records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Journal Entry
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the case escalation management process.
- **journal-entry** ↗ - connected through the case escalation management process.

Price Level Governance RESTlet

Source: `Scripts/RESTlet/customscript_demo_case_follow_up_reminder_restlet_16`

Price Level Governance RESTlet supports case follow-up reminder on Vendor records.

Purpose

This script supports case follow-up reminder for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Price Level Governance** ↗ - connected through the case follow-up reminder process.
- **vendor** ↗ - connected through the case follow-up reminder process.

Return Authorization Processing RESTlet

Source: `Scripts/RESTlet/customscript_demo_drop_ship_coordination_restlet_05`

Return Authorization Processing RESTlet supports drop ship coordination on Contact records.

Purpose

This script supports drop ship coordination for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Return Authorization Processing** ↗ - connected through the drop ship coordination process.
- **contact** ↗ - connected through the drop ship coordination process.

Drop Ship Coordination RESTlet

Source: `Scripts/RESTlet/customscript_demo_forecast_adjustment_review_restlet_11`

Drop Ship Coordination RESTlet supports forecast adjustment review on Sales Return records.

Purpose

This script supports forecast adjustment review for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the forecast adjustment review process.
- **sales-return** ↗ - connected through the forecast adjustment review process.

Order Change Audit RESTlet

Source: `Scripts/RESTlet/customscript_demo_invoice_delivery_preferences_restlet_09`

Order Change Audit RESTlet supports invoice delivery preferences on Assembly Item records.

Purpose

This script supports invoice delivery preferences for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Order Change Audit** ↗ - connected through the invoice delivery preferences process.
- **assembly-item** ↗ - connected through the invoice delivery preferences process.

Purchase Order Closeout RESTlet

Source: `Scripts/RESTlet/customscript_demo_invoice_queue_automation_restlet_17`

Purchase Order Closeout RESTlet supports invoice queue automation on Return Authorization records.

Purpose

This script supports invoice queue automation for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Purchase Order Closeout** ↗ - connected through the invoice queue automation process.
- **return-authorization** ↗ - connected through the invoice queue automation process.

Customer Deposit Matching RESTlet

Source: `Scripts/RESTlet/customscript_demo_item_fulfillment_labeling_restlet_14`

Customer Deposit Matching RESTlet supports item fulfillment labeling on Billing Schedule records.

Purpose

This script supports item fulfillment labeling for Billing Schedule records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Billing Schedule
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the item fulfillment labeling process.
- **billing-schedule** ↗ - connected through the item fulfillment labeling process.

Journal Approval Controls RESTlet

Source: `Scripts/RESTlet/customscript_demo_item_margin_guardrails_restlet_02`

Journal Approval Controls RESTlet supports item margin guardrails on Contact records.

Purpose

This script supports item margin guardrails for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Journal Approval Controls** ↗ - connected through the item margin guardrails process.
- **contact** ↗ - connected through the item margin guardrails process.

Customer Duplicate Review RESTlet

Source: `Scripts/RESTlet/customscript_demo_journal_approval_controls_restlet_10`

Customer Duplicate Review RESTlet supports journal approval controls on Partner records.

Purpose

This script supports journal approval controls for Partner records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Partner
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the journal approval controls process.
- **partner** ↗ - connected through the journal approval controls process.

Price Level Governance RESTlet

Source: `Scripts/RESTlet/customscript_demo_price_level_governance_restlet_12`

Price Level Governance RESTlet supports price level governance on Serialized Inventory Item records.

Purpose

This script supports price level governance for Serialized Inventory Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Serialized Inventory Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Price Level Governance** ↗ - connected through the price level governance process.
- **serialized-inventory-item** ↗ - connected through the price level governance process.

Purchase Price Variance Review RESTlet

Source: `Scripts/RESTlet/customscript_demo_pricing_review_process_restlet_18`

Purchase Price Variance Review RESTlet supports pricing review process on Inventory Item records.

Purpose

This script supports pricing review process for Inventory Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Inventory Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Purchase Price Variance Review** ↗ - connected through the pricing review process process.
- **inventory-item** ↗ - connected through the pricing review process process.

Project Billing Review RESTlet

Source: `Scripts/RESTlet/customscript_demo_quote_approval_matrix_restlet_08`

Project Billing Review RESTlet supports quote approval matrix on Bin records.

Purpose

This script supports quote approval matrix for Bin records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Bin
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Project Billing Review** ↗ - connected through the quote approval matrix process.
- **bin** ↗ - connected through the quote approval matrix process.

Customer Tier Management RESTlet

Source: `Scripts/RESTlet/customscript_demo_quote_expiration_monitoring_restlet_01`

Customer Tier Management RESTlet supports quote expiration monitoring on Assembly Item records.

Purpose

This script supports quote expiration monitoring for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Assembly Item
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the quote expiration monitoring process.
- **assembly-item** ↗ - connected through the quote expiration monitoring process.

Customer Duplicate Review RESTlet

Source: `Scripts/RESTlet/customscript_demo_sales_rep_assignment_rules_restlet_06`

Customer Duplicate Review RESTlet supports sales rep assignment rules on Customer Deposit records.

Purpose

This script supports sales rep assignment rules for Customer Deposit records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Customer Deposit
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the sales rep assignment rules process.
- **customer-deposit** ↗ - connected through the sales rep assignment rules process.

Purchase Order Closeout RESTlet

Source: `Scripts/RESTlet/customscript_demo_support_intake_triage_restlet_13`

Purchase Order Closeout RESTlet supports support intake triage on Contact records.

Purpose

This script supports support intake triage for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Purchase Order Closeout** ↗ - connected through the support intake triage process.
- **contact** ↗ - connected through the support intake triage process.

Forecast Adjustment Review RESTlet

Source: `Scripts/RESTlet/customscript_demo_tax_code_review_restlet_03`

Forecast Adjustment Review RESTlet supports tax code review on Sales Return records.

Purpose

This script supports tax code review for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Forecast Adjustment Review** ↗ - connected through the tax code review process.
- **sales-return** ↗ - connected through the tax code review process.

Inventory Transfer Review RESTlet

Source: `Scripts/RESTlet/customscript_demo_vendor_onboarding_review_restlet_07`

Inventory Transfer Review RESTlet supports vendor onboarding review on Vendor records.

Purpose

This script supports vendor onboarding review for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Transfer Review** ↗ - connected through the vendor onboarding review process.
- **vendor** ↗ - connected through the vendor onboarding review process.

Customer Deposit Matching RESTlet

Source: `Scripts/RESTlet/customscript_demo_vendor_payment_release_restlet_15`

Customer Deposit Matching RESTlet supports vendor payment release on Vendor records.

Purpose

This script supports vendor payment release for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	RESTlet
Deployed to	Vendor
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the vendor payment release process.
- **vendor** ↗ - connected through the vendor payment release process.

Employee Approval Limits Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_billing_schedule_monitor_scheduled_15`

Employee Approval Limits Scheduled supports billing schedule monitor on Assembly Item records.

Purpose

This script supports billing schedule monitor for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the billing schedule monitor process.
- **assembly-item** ↗ - connected through the billing schedule monitor process.

Inventory Transfer Review Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_commission_eligibility_flags_scheduled_10`

Inventory Transfer Review Scheduled supports commission eligibility flags on Sales Return records.

Purpose

This script supports commission eligibility flags for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Sales Return
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Transfer Review** ↗ - connected through the commission eligibility flags process.
- **sales-return** ↗ - connected through the commission eligibility flags process.

Project Task Assignment Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_contract_renewal_alerts_scheduled_11`

Project Task Assignment Scheduled supports contract renewal alerts on Contact records.

Purpose

This script supports contract renewal alerts for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Project Task Assignment** ↗ - connected through the contract renewal alerts process.
- **contact** ↗ - connected through the contract renewal alerts process.

Invoice Delivery Preferences Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_credit_hold_review_scheduled_03`

Invoice Delivery Preferences Scheduled supports credit hold review on Contact records.

Purpose

This script supports credit hold review for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Contact
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Invoice Delivery Preferences** ↗ - connected through the credit hold review process.
- **contact** ↗ - connected through the credit hold review process.

Employee Approval Limits Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_customer_credit_recheck_scheduled_09`

Employee Approval Limits Scheduled supports customer credit recheck on Sales Return records.

Purpose

This script supports customer credit recheck for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the customer credit recheck process.
- **sales-return** ↗ - connected through the customer credit recheck process.

Item Fulfillment Labeling Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_customer_deposit_matching_scheduled_18`

Item Fulfillment Labeling Scheduled supports customer deposit matching on Sales Tax Item records.

Purpose

This script supports customer deposit matching for Sales Tax Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Sales Tax Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Labeling** ↗ - connected through the customer deposit matching process.
- **sales-tax-item** ↗ - connected through the customer deposit matching process.

Customer Credit Recheck Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_expense_approval_routing_scheduled_13`

Customer Credit Recheck Scheduled supports expense approval routing on Vendor records.

Purpose

This script supports expense approval routing for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the expense approval routing process.
- **vendor** ↗ - connected through the expense approval routing process.

Inventory Count Reconciliation Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_inventory_count_reconciliation_scheduled_08`

Inventory Count Reconciliation Scheduled supports inventory count reconciliation on Credit Memo records.

Purpose

This script supports inventory count reconciliation for Credit Memo records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Credit Memo
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Count Reconciliation** ↗ - connected through the inventory count reconciliation process.
- **credit-memo** ↗ - connected through the inventory count reconciliation process.

Inventory Count Reconciliation Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_inventory_reorder_alerts_scheduled_21`

Inventory Count Reconciliation Scheduled supports inventory reorder alerts on Cash Sale records.

Purpose

This script supports inventory reorder alerts for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Count Reconciliation** ↗ - connected through the inventory reorder alerts process.
- **cash-sale** ↗ - connected through the inventory reorder alerts process.

Return Authorization Processing Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_order_approval_workflow_scheduled_20`

Return Authorization Processing Scheduled supports order approval workflow on Sales Order records.

Purpose

This script supports order approval workflow for Sales Order records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Sales Order
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Return Authorization Processing** ↗ - connected through the order approval workflow process.
- **sales-order** ↗ - connected through the order approval workflow process.

Item Fulfillment Controls Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_partner_referral_tracking_scheduled_14`

Item Fulfillment Controls Scheduled supports partner referral tracking on Service Item records.

Purpose

This script supports partner referral tracking for Service Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Service Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Controls** ↗ - connected through the partner referral tracking process.
- **service-item** ↗ - connected through the partner referral tracking process.

Item Master Governance Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_pricing_review_process_scheduled_01`

Item Master Governance Scheduled supports pricing review process on Sales Return records.

Purpose

This script supports pricing review process for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Master Governance** ↗ - connected through the pricing review process process.
- **sales-return** ↗ - connected through the pricing review process process.

Expense Approval Routing Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_project_billing_review_scheduled_06`

Expense Approval Routing Scheduled supports project billing review on Task records.

Purpose

This script supports project billing review for Task records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Task
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the project billing review process.
- **task** ↗ - connected through the project billing review process.

Drop Ship Coordination Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_project_task_assignment_scheduled_19`

Drop Ship Coordination Scheduled supports project task assignment on Contact records.

Purpose

This script supports project task assignment for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the project task assignment process.
- **contact** ↗ - connected through the project task assignment process.

Customer Duplicate Review Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_purchase_order_closeout_scheduled_17`

Customer Duplicate Review Scheduled supports purchase order closeout on Sales Return records.

Purpose

This script supports purchase order closeout for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Sales Return
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the purchase order closeout process.
- **sales-return** ↗ - connected through the purchase order closeout process.

Customer Deposit Matching Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_renewal_opportunity_routing_scheduled_07`

Customer Deposit Matching Scheduled supports renewal opportunity routing on Assembly Item records.

Purpose

This script supports renewal opportunity routing for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the renewal opportunity routing process.
- **assembly-item** ↗ - connected through the renewal opportunity routing process.

Demo Core Utilities Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_sales_order_risk_review_scheduled_02`

Demo Core Utilities Scheduled supports sales order risk review on Support Case records.

Purpose

This script supports sales order risk review for Support Case records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Support Case
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the sales order risk review process.
- **support-case** ↗ - connected through the sales order risk review process.

Demo Core Utilities Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_sales_tax_exception_review_scheduled_16`

Demo Core Utilities Scheduled supports sales tax exception review on Payment Method records.

Purpose

This script supports sales tax exception review for Payment Method records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Payment Method
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the sales tax exception review process.
- **payment-method** ↗ - connected through the sales tax exception review process.

Item Master Governance Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_shipping_exception_alerts_scheduled_05`

Item Master Governance Scheduled supports shipping exception alerts on Vendor records.

Purpose

This script supports shipping exception alerts for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Master Governance** ↗ - connected through the shipping exception alerts process.
- **vendor** ↗ - connected through the shipping exception alerts process.

Demo Core Utilities Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_support_case_routing_scheduled_22`

Demo Core Utilities Scheduled supports support case routing on Item Fulfillment records.

Purpose

This script supports support case routing for Item Fulfillment records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Item Fulfillment
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the support case routing process.
- **item-fulfillment** ↗ - connected through the support case routing process.

Drop Ship Coordination Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_vendor_bill_exception_review_scheduled_04`

Drop Ship Coordination Scheduled supports vendor bill exception review on Assembly Build records.

Purpose

This script supports vendor bill exception review for Assembly Build records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Assembly Build
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the vendor bill exception review process.
- **assembly-build** ↗ - connected through the vendor bill exception review process.

Invoice Delivery Preferences Scheduled

Source: `Scripts/Scheduled-Script/customscript_demo_warehouse_transfer_controls_scheduled_12`

Invoice Delivery Preferences Scheduled supports warehouse transfer controls on Department records.

Purpose

This script supports warehouse transfer controls for Department records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Scheduled Script
Deployed to	Department
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Invoice Delivery Preferences** ↗ - connected through the warehouse transfer controls process.
- **department** ↗ - connected through the warehouse transfer controls process.

Forecast Adjustment Review Suitelet

Source: `Scripts/Suitelet/customscript_demo_backorder_review_queue_suitelet_03`

Forecast Adjustment Review Suitelet supports backorder review queue on Account records.

Purpose

This script supports backorder review queue for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Forecast Adjustment Review** ↗ - connected through the backorder review queue process.
- **account** ↗ - connected through the backorder review queue process.

Customer Duplicate Review Suitelet

Source: `Scripts/Suitelet/customscript_demo_campaign_response_routing_suitelet_12`

Customer Duplicate Review Suitelet supports campaign response routing on Prospect records.

Purpose

This script supports campaign response routing for Prospect records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Prospect
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the campaign response routing process.
- **prospect** ↗ - connected through the campaign response routing process.

Fulfillment Hold Automation Suitelet

Source: `Scripts/Suitelet/customscript_demo_cash_sale_exception_review_suitelet_13`

Fulfillment Hold Automation Suitelet supports cash sale exception review on Class records.

Purpose

This script supports cash sale exception review for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Fulfillment Hold Automation** ↗ - connected through the cash sale exception review process.
- **class** ↗ - connected through the cash sale exception review process.

Fulfillment Hold Automation Suitelet

Source: `Scripts/Suitelet/customscript_demo_customer_duplicate_review_suitelet_11`

Fulfillment Hold Automation Suitelet supports customer duplicate review on Account records.

Purpose

This script supports customer duplicate review for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Fulfillment Hold Automation** ↗ - connected through the customer duplicate review process.
- **account** ↗ - connected through the customer duplicate review process.

Forecast Adjustment Review Suitelet

Source: `Scripts/Suitelet/customscript_demo_customer_onboarding_controls_suitelet_19`

Forecast Adjustment Review Suitelet supports customer onboarding controls on Contact records.

Purpose

This script supports customer onboarding controls for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Forecast Adjustment Review** ↗ - connected through the customer onboarding controls process.
- **contact** ↗ - connected through the customer onboarding controls process.

Demo Core Utilities Suitelet

Source: `Scripts/Suitelet/customscript_demo_customer_tier_management_suitelet_02`

Demo Core Utilities Suitelet supports customer tier management on Work Order records.

Purpose

This script supports customer tier management for Work Order records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Work Order
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the customer tier management process.
- **work-order** ↗ - connected through the customer tier management process.

Quote Approval Matrix Suitelet

Source: `Scripts/Suitelet/customscript_demo_demo_core_utilities_suitelet_18`

Quote Approval Matrix Suitelet supports demo core utilities on Inventory Item records.

Purpose

This script supports demo core utilities for Inventory Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Inventory Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Quote Approval Matrix** ↗ - connected through the demo core utilities process.
- **inventory-item** ↗ - connected through the demo core utilities process.

Employee Approval Limits Suitelet

Source: `Scripts/Suitelet/customscript_demo_employee_approval_limits_suitelet_04`

Employee Approval Limits Suitelet supports employee approval limits on Project records.

Purpose

This script supports employee approval limits for Project records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Project
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the employee approval limits process.
- **project** ↗ - connected through the employee approval limits process.

Customer Duplicate Review Suitelet

Source: `Scripts/Suitelet/customscript_demo_fulfillment_hold_automation_suitelet_05`

Customer Duplicate Review Suitelet supports fulfillment hold automation on Class records.

Purpose

This script supports fulfillment hold automation for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the fulfillment hold automation process.
- **class** ↗ - connected through the fulfillment hold automation process.

Item Fulfillment Controls Suitelet

Source: `Scripts/Suitelet/customscript_demo_inventory_transfer_review_suitelet_17`

Item Fulfillment Controls Suitelet supports inventory transfer review on Return Authorization records.

Purpose

This script supports inventory transfer review for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Controls** ↗ - connected through the inventory transfer review process.
- **return-authorization** ↗ - connected through the inventory transfer review process.

Customer Duplicate Review Suitelet

Source: `Scripts/Suitelet/customscript_demo_item_fulfillment_controls_suitelet_01`

Customer Duplicate Review Suitelet supports item fulfillment controls on Return Authorization records.

Purpose

This script supports item fulfillment controls for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the item fulfillment controls process.
- **return-authorization** ↗ - connected through the item fulfillment controls process.

Invoice Delivery Preferences Suitelet

Source: `Scripts/Suitelet/customscript_demo_item_master_governance_suitelet_09`

Invoice Delivery Preferences Suitelet supports item master governance on Return Authorization records.

Purpose

This script supports item master governance for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Return Authorization
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Invoice Delivery Preferences** ↗ - connected through the item master governance process.
- **return-authorization** ↗ - connected through the item master governance process.

Item Fulfillment Controls Suitelet

Source: `Scripts/Suitelet/customscript_demo_order_change_audit_suitelet_15`

Item Fulfillment Controls Suitelet supports order change audit on Cash Sale records.

Purpose

This script supports order change audit for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Controls** ↗ - connected through the order change audit process.
- **cash-sale** ↗ - connected through the order change audit process.

Customer Duplicate Review Suitelet

Source: `Scripts/Suitelet/customscript_demo_payment_application_review_suitelet_06`

Customer Duplicate Review Suitelet supports payment application review on Cash Sale records.

Purpose

This script supports payment application review for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the payment application review process.
- **cash-sale** ↗ - connected through the payment application review process.

Expense Approval Routing Suitelet

Source: `Scripts/Suitelet/customscript_demo_purchase_price_variance_review_suitelet_07`

Expense Approval Routing Suitelet supports purchase price variance review on Cash Sale records.

Purpose

This script supports purchase price variance review for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the purchase price variance review process.
- **cash-sale** ↗ - connected through the purchase price variance review process.

Order Change Audit Suitelet

Source: `Scripts/Suitelet/customscript_demo_purchase_request_approval_suitelet_21`

Order Change Audit Suitelet supports purchase request approval on Vendor records.

Purpose

This script supports purchase request approval for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Order Change Audit** ↗ - connected through the purchase request approval process.
- **vendor** ↗ - connected through the purchase request approval process.

Payment Application Review Suitelet

Source: `Scripts/Suitelet/customscript_demo_return_authorization_processing_suitelet_22`

Payment Application Review Suitelet supports return authorization processing on Vendor Bill records.

Purpose

This script supports return authorization processing for Vendor Bill records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Vendor Bill
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Payment Application Review** ↗ - connected through the return authorization processing process.
- **vendor-bill** ↗ - connected through the return authorization processing process.

Demo Core Utilities Suitelet

Source: `Scripts/Suitelet/customscript_demo_revenue_recognition_review_suitelet_08`

Demo Core Utilities Suitelet supports revenue recognition review on Item Receipt records.

Purpose

This script supports revenue recognition review for Item Receipt records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Item Receipt
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the revenue recognition review process.
- **item-receipt** ↗ - connected through the revenue recognition review process.

Price Level Governance Suitelet

Source: `Scripts/Suitelet/customscript_demo_serialized_item_compliance_suitelet_16`

Price Level Governance Suitelet supports serialized item compliance on Shipping Item records.

Purpose

This script supports serialized item compliance for Shipping Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Shipping Item
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Price Level Governance** ↗ - connected through the serialized item compliance process.
- **shipping-item** ↗ - connected through the serialized item compliance process.

Customer Tier Management Suitelet

Source: `Scripts/Suitelet/customscript_demo_service_case_sla_tracking_suitelet_10`

Customer Tier Management Suitelet supports service case sla tracking on Location records.

Purpose

This script supports service case sla tracking for Location records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Location
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the service case sla tracking process.
- **location** ↗ - connected through the service case sla tracking process.

Customer Credit Recheck Suitelet

Source: `Scripts/Suitelet/customscript_demo_shipping_method_validation_suitelet_14`

Customer Credit Recheck Suitelet supports shipping method validation on Lot Numbered Item records.

Purpose

This script supports shipping method validation for Lot Numbered Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Lot Numbered Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the shipping method validation process.
- **lot-numbered-item** ↗ - connected through the shipping method validation process.

Inventory Count Reconciliation Suitelet

Source: `Scripts/Suitelet/customscript_demo_vendor_compliance_checks_suitelet_20`

Inventory Count Reconciliation Suitelet supports vendor compliance checks on Invoice records.

Purpose

This script supports vendor compliance checks for Invoice records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Suitelet
Deployed to	Invoice
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Count Reconciliation** ↗ - connected through the vendor compliance checks process.
- **invoice** ↗ - connected through the vendor compliance checks process.

Employee Approval Limits User Event

Source: `Scripts/User-Event-Script/customscript_demo_backorder_review_queue_user_event_32`

Employee Approval Limits User Event supports backorder review queue on Opportunity records.

Purpose

This script supports backorder review queue for Opportunity records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Opportunity
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the backorder review queue process.
- **opportunity** ↗ - connected through the backorder review queue process.

Forecast Adjustment Review User Event

Source: `Scripts/User-Event-Script/customscript_demo_billing_schedule_monitor_user_event_22`

Forecast Adjustment Review User Event supports billing schedule monitor on Kit Item records.

Purpose

This script supports billing schedule monitor for Kit Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Kit Item
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Forecast Adjustment Review** ↗ - connected through the billing schedule monitor process.
- **kit-item** ↗ - connected through the billing schedule monitor process.

Customer Tier Management User Event

Source: `Scripts/User-Event-Script/customscript_demo_case_follow_up_reminder_user_event_06`

Customer Tier Management User Event supports case follow-up reminder on Vendor records.

Purpose

This script supports case follow-up reminder for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the case follow-up reminder process.
- **vendor** ↗ - connected through the case follow-up reminder process.

Journal Approval Controls User Event

Source: `Scripts/User-Event-Script/customscript_demo_commission_eligibility_flags_user_event_17`

Journal Approval Controls User Event supports commission eligibility flags on Account records.

Purpose

This script supports commission eligibility flags for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Journal Approval Controls** ↗ - connected through the commission eligibility flags process.
- **account** ↗ - connected through the commission eligibility flags process.

Customer Duplicate Review User Event

Source: `Scripts/User-Event-Script/customscript_demo_contract_renewal_alerts_user_event_18`

Customer Duplicate Review User Event supports contract renewal alerts on Inventory Transfer records.

Purpose

This script supports contract renewal alerts for Inventory Transfer records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Inventory Transfer
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the contract renewal alerts process.
- **inventory-transfer** ↗ - connected through the contract renewal alerts process.

Customer Deposit Matching User Event

Source: `Scripts/User-Event-Script/customscript_demo_credit_hold_review_user_event_10`

Customer Deposit Matching User Event supports credit hold review on Return Authorization records.

Purpose

This script supports credit hold review for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the credit hold review process.
- **return-authorization** ↗ - connected through the credit hold review process.

Drop Ship Coordination User Event

Source: `Scripts/User-Event-Script/customscript_demo_customer_credit_recheck_user_event_16`

Drop Ship Coordination User Event supports customer credit recheck on Purchase Requisition records.

Purpose

This script supports customer credit recheck for Purchase Requisition records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Purchase Requisition
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the customer credit recheck process.
- **purchase-requisition** ↗ - connected through the customer credit recheck process.

Project Task Assignment User Event

Source: `Scripts/User-Event-Script/customscript_demo_customer_deposit_matching_user_event_25`

Project Task Assignment User Event supports customer deposit matching on Account records.

Purpose

This script supports customer deposit matching for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Project Task Assignment** ↗ - connected through the customer deposit matching process.
- **account** ↗ - connected through the customer deposit matching process.

Item Master Governance User Event

Source: `Scripts/User-Event-Script/customscript_demo_customer_duplicate_review_user_event_40`

Item Master Governance User Event supports customer duplicate review on Price Level records.

Purpose

This script supports customer duplicate review for Price Level records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Price Level
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Master Governance** ↗ - connected through the customer duplicate review process.
- **price-level** ↗ - connected through the customer duplicate review process.

Customer Credit Recheck User Event

Source: `Scripts/User-Event-Script/customscript_demo_customer_tier_management_user_event_31`

Customer Credit Recheck User Event supports customer tier management on Sales Return records.

Purpose

This script supports customer tier management for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the customer tier management process.
- **sales-return** ↗ - connected through the customer tier management process.

Customer Tier Management User Event

Source: `Scripts/User-Event-Script/customscript_demo_employee_approval_limits_user_event_33`

Customer Tier Management User Event supports employee approval limits on Contact records.

Purpose

This script supports employee approval limits for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the employee approval limits process.
- **contact** ↗ - connected through the employee approval limits process.

Demo Core Utilities User Event

Source: `Scripts/User-Event-Script/customscript_demo_expense_approval_routing_user_event_20`

Demo Core Utilities User Event supports expense approval routing on Campaign records.

Purpose

This script supports expense approval routing for Campaign records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Campaign
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the expense approval routing process.
- **campaign** ↗ - connected through the expense approval routing process.

Item Margin Guardrails User Event

Source: `Scripts/User-Event-Script/customscript_demo_forecast_adjustment_review_user_event_01`

Item Margin Guardrails User Event supports forecast adjustment review on Sales Return records.

Purpose

This script supports forecast adjustment review for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Sales Return
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Margin Guardrails** ↗ - connected through the forecast adjustment review process.
- **sales-return** ↗ - connected through the forecast adjustment review process.

Customer Credit Recheck User Event

Source: `Scripts/User-Event-Script/customscript_demo_fulfillment_hold_automation_user_event_34`

Customer Credit Recheck User Event supports fulfillment hold automation on Phone Call records.

Purpose

This script supports fulfillment hold automation for Phone Call records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Phone Call
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the fulfillment hold automation process.
- **phone-call** ↗ - connected through the fulfillment hold automation process.

Project Task Assignment User Event

Source: `Scripts/User-Event-Script/customscript_demo_inventory_count_reconciliation_user_event_15`

Project Task Assignment User Event supports inventory count reconciliation on Return Authorization records.

Purpose

This script supports inventory count reconciliation for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Return Authorization
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Project Task Assignment** ↗ - connected through the inventory count reconciliation process.
- **return-authorization** ↗ - connected through the inventory count reconciliation process.

Renewal Opportunity Routing User Event

Source: `Scripts/User-Event-Script/customscript_demo_inventory_reorder_alerts_user_event_28`

Renewal Opportunity Routing User Event supports inventory reorder alerts on Vendor records.

Purpose

This script supports inventory reorder alerts for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Renewal Opportunity Routing** ↗ - connected through the inventory reorder alerts process.
- **vendor** ↗ - connected through the inventory reorder alerts process.

Journal Approval Controls User Event

Source: `Scripts/User-Event-Script/customscript_demo_invoice_queue_automation_user_event_07`

Journal Approval Controls User Event supports invoice queue automation on Return Authorization records.

Purpose

This script supports invoice queue automation for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Journal Approval Controls** ↗ - connected through the invoice queue automation process.
- **return-authorization** ↗ - connected through the invoice queue automation process.

Expense Approval Routing User Event

Source: `Scripts/User-Event-Script/customscript_demo_item_fulfillment_controls_user_event_30`

Expense Approval Routing User Event supports item fulfillment controls on Estimate records.

Purpose

This script supports item fulfillment controls for Estimate records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Estimate
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the item fulfillment controls process.
- **estimate** ↗ - connected through the item fulfillment controls process.

Customer Deposit Matching User Event

Source: `Scripts/User-Event-Script/customscript_demo_item_fulfillment_labeling_user_event_04`

Customer Deposit Matching User Event supports item fulfillment labeling on Billing Schedule records.

Purpose

This script supports item fulfillment labeling for Billing Schedule records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Billing Schedule
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the item fulfillment labeling process.
- **billing-schedule** ↗ - connected through the item fulfillment labeling process.

Drop Ship Coordination User Event

Source: `Scripts/User-Event-Script/customscript_demo_item_master_governance_user_event_38`

Drop Ship Coordination User Event supports item master governance on Inventory Adjustment records.

Purpose

This script supports item master governance for Inventory Adjustment records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Inventory Adjustment
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the item master governance process.
- **inventory-adjustment** ↗ - connected through the item master governance process.

Demo Core Utilities User Event

Source: `Scripts/User-Event-Script/customscript_demo_order_approval_workflow_user_event_27`

Demo Core Utilities User Event supports order approval workflow on Vendor records.

Purpose

This script supports order approval workflow for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the order approval workflow process.
- **vendor** ↗ - connected through the order approval workflow process.

Customer Deposit Matching User Event

Source: `Scripts/User-Event-Script/customscript_demo_partner_referral_tracking_user_event_21`

Customer Deposit Matching User Event supports partner referral tracking on Cash Sale records.

Purpose

This script supports partner referral tracking for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the partner referral tracking process.
- **cash-sale** ↗ - connected through the partner referral tracking process.

Customer Duplicate Review User Event

Source: `Scripts/User-Event-Script/customscript_demo_payment_application_review_user_event_35`

Customer Duplicate Review User Event supports payment application review on Vendor records.

Purpose

This script supports payment application review for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the payment application review process.
- **vendor** ↗ - connected through the payment application review process.

Customer Duplicate Review User Event

Source: `Scripts/User-Event-Script/customscript_demo_price_level_governance_user_event_02`

Customer Duplicate Review User Event supports price level governance on Serialized Inventory Item records.

Purpose

This script supports price level governance for Serialized Inventory Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Serialized Inventory Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the price level governance process.
- **serialized-inventory-item** ↗ - connected through the price level governance process.

Customer Tier Management User Event

Source: `Scripts/User-Event-Script/customscript_demo_pricing_review_process_user_event_08`

Customer Tier Management User Event supports pricing review process on Inventory Item records.

Purpose

This script supports pricing review process for Inventory Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Inventory Item
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the pricing review process process.
- **inventory-item** ↗ - connected through the pricing review process process.

Employee Approval Limits User Event

Source: `Scripts/User-Event-Script/customscript_demo_project_billing_review_user_event_13`

Employee Approval Limits User Event supports project billing review on Cash Sale records.

Purpose

This script supports project billing review for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the project billing review process.
- **cash-sale** ↗ - connected through the project billing review process.

Employee Approval Limits User Event

Source: `Scripts/User-Event-Script/customscript_demo_project_task_assignment_user_event_26`

Employee Approval Limits User Event supports project task assignment on Customer records.

Purpose

This script supports project task assignment for Customer records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Customer
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Employee Approval Limits** ↗ - connected through the project task assignment process.
- **customer** ↗ - connected through the project task assignment process.

Item Margin Guardrails User Event

Source: `Scripts/User-Event-Script/customscript_demo_purchase_order_closeout_user_event_24`

Item Margin Guardrails User Event supports purchase order closeout on Account records.

Purpose

This script supports purchase order closeout for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Margin Guardrails** ↗ - connected through the purchase order closeout process.
- **account** ↗ - connected through the purchase order closeout process.

Customer Credit Recheck User Event

Source: `Scripts/User-Event-Script/customscript_demo_purchase_price_variance_review_user_event_36`

Customer Credit Recheck User Event supports purchase price variance review on Vendor Payment records.

Purpose

This script supports purchase price variance review for Vendor Payment records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Vendor Payment
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the purchase price variance review process.
- **vendor-payment** ↗ - connected through the purchase price variance review process.

Fulfillment Hold Automation User Event

Source: `Scripts/User-Event-Script/customscript_demo_renewal_opportunity_routing_user_event_14`

Fulfillment Hold Automation User Event supports renewal opportunity routing on Expense Report records.

Purpose

This script supports renewal opportunity routing for Expense Report records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Expense Report
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Fulfillment Hold Automation** ↗ - connected through the renewal opportunity routing process.
- **expense-report** ↗ - connected through the renewal opportunity routing process.

Forecast Adjustment Review User Event

Source: `Scripts/User-Event-Script/customscript_demo_revenue_recognition_review_user_event_37`

Forecast Adjustment Review User Event supports revenue recognition review on Assembly Item records.

Purpose

This script supports revenue recognition review for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Assembly Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Forecast Adjustment Review** ↗ - connected through the revenue recognition review process.
- **assembly-item** ↗ - connected through the revenue recognition review process.

Fulfillment Hold Automation User Event

Source: `Scripts/User-Event-Script/customscript_demo_sales_order_risk_review_user_event_09`

Fulfillment Hold Automation User Event supports sales order risk review on Account records.

Purpose

This script supports sales order risk review for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Fulfillment Hold Automation** ↗ - connected through the sales order risk review process.
- **account** ↗ - connected through the sales order risk review process.

Drop Ship Coordination User Event

Source: `Scripts/User-Event-Script/customscript_demo_sales_tax_exception_review_user_event_23`

Drop Ship Coordination User Event supports sales tax exception review on Return Authorization records.

Purpose

This script supports sales tax exception review for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the sales tax exception review process.
- **return-authorization** ↗ - connected through the sales tax exception review process.

Inventory Transfer Review User Event

Source: `Scripts/User-Event-Script/customscript_demo_service_case_sla_tracking_user_event_39`

Inventory Transfer Review User Event supports service case sla tracking on Sales Return records.

Purpose

This script supports service case sla tracking for Sales Return records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Sales Return
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Inventory Transfer Review** ↗ - connected through the service case sla tracking process.
- **sales-return** ↗ - connected through the service case sla tracking process.

Customer Credit Recheck User Event

Source: `Scripts/User-Event-Script/customscript_demo_shipping_exception_alerts_user_event_12`

Customer Credit Recheck User Event supports shipping exception alerts on Lead records.

Purpose

This script supports shipping exception alerts for Lead records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Lead
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the shipping exception alerts process.
- **lead** ↗ - connected through the shipping exception alerts process.

Customer Duplicate Review User Event

Source: `Scripts/User-Event-Script/customscript_demo_support_case_routing_user_event_29`

Customer Duplicate Review User Event supports support case routing on Assembly Item records.

Purpose

This script supports support case routing for Assembly Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Assembly Item
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the support case routing process.
- **assembly-item** ↗ - connected through the support case routing process.

Item Fulfillment Labeling User Event

Source: `Scripts/User-Event-Script/customscript_demo_support_intake_triage_user_event_03`

Item Fulfillment Labeling User Event supports support intake triage on Contact records.

Purpose

This script supports support intake triage for Contact records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Contact
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Labeling** ↗ - connected through the support intake triage process.
- **contact** ↗ - connected through the support intake triage process.

Expense Approval Routing User Event

Source: `Scripts/User-Event-Script/customscript_demo_vendor_bill_exception_review_user_event_11`

Expense Approval Routing User Event supports vendor bill exception review on Class records.

Purpose

This script supports vendor bill exception review for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the vendor bill exception review process.
- **class** ↗ - connected through the vendor bill exception review process.

Customer Credit Recheck User Event

Source: `Scripts/User-Event-Script/customscript_demo_vendor_payment_release_user_event_05`

Customer Credit Recheck User Event supports vendor payment release on Vendor records.

Purpose

This script supports vendor payment release for Vendor records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Vendor
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the vendor payment release process.
- **vendor** ↗ - connected through the vendor payment release process.

Customer Duplicate Review User Event

Source: `Scripts/User-Event-Script/customscript_demo_warehouse_transfer_controls_user_event_19`

Customer Duplicate Review User Event supports warehouse transfer controls on Class records.

Purpose

This script supports warehouse transfer controls for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	User Event Script
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Duplicate Review** ↗ - connected through the warehouse transfer controls process.
- **class** ↗ - connected through the warehouse transfer controls process.

Project Billing Review Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_billing_schedule_monitor_workflow_action_14`

Project Billing Review Workflow Action supports billing schedule monitor on Kit Item records.

Purpose

This script supports billing schedule monitor for Kit Item records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Kit Item
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Project Billing Review** ↗ - connected through the billing schedule monitor process.
- **kit-item** ↗ - connected through the billing schedule monitor process.

Item Margin Guardrails Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_commission_eligibility_flags_workflow_action_09`

Item Margin Guardrails Workflow Action supports commission eligibility flags on Account records.

Purpose

This script supports commission eligibility flags for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Margin Guardrails** ↗ - connected through the commission eligibility flags process.
- **account** ↗ - connected through the commission eligibility flags process.

Demo Core Utilities Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_contract_renewal_alerts_workflow_action_10`

Demo Core Utilities Workflow Action supports contract renewal alerts on Inventory Transfer records.

Purpose

This script supports contract renewal alerts for Inventory Transfer records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Inventory Transfer
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Demo Core Utilities** ↗ - connected through the contract renewal alerts process.
- **inventory-transfer** ↗ - connected through the contract renewal alerts process.

Customer Tier Management Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_credit_hold_review_workflow_action_02`

Customer Tier Management Workflow Action supports credit hold review on Return Authorization records.

Purpose

This script supports credit hold review for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Tier Management** ↗ - connected through the credit hold review process.
- **return-authorization** ↗ - connected through the credit hold review process.

Partner Referral Tracking Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_customer_credit_recheck_workflow_action_08`

Partner Referral Tracking Workflow Action supports customer credit recheck on Purchase Requisition records.

Purpose

This script supports customer credit recheck for Purchase Requisition records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Purchase Requisition
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Partner Referral Tracking** ↗ - connected through the customer credit recheck process.
- **purchase-requisition** ↗ - connected through the customer credit recheck process.

Quote Expiration Monitoring Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_expense_approval_routing_workflow_action_12`

Quote Expiration Monitoring Workflow Action supports expense approval routing on Campaign records.

Purpose

This script supports expense approval routing for Campaign records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Campaign
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Quote Expiration Monitoring** ↗ - connected through the expense approval routing process.
- **campaign** ↗ - connected through the expense approval routing process.

Drop Ship Coordination Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_inventory_count_reconciliation_workflow_action_07`

Drop Ship Coordination Workflow Action supports inventory count reconciliation on Return Authorization records.

Purpose

This script supports inventory count reconciliation for Return Authorization records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Return Authorization
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the inventory count reconciliation process.
- **return-authorization** ↗ - connected through the inventory count reconciliation process.

Expense Approval Routing Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_partner_referral_tracking_workflow_action_13`

Expense Approval Routing Workflow Action supports partner referral tracking on Cash Sale records.

Purpose

This script supports partner referral tracking for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Expense Approval Routing** ↗ - connected through the partner referral tracking process.
- **cash-sale** ↗ - connected through the partner referral tracking process.

Item Fulfillment Labeling Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_project_billing_review_workflow_action_05`

Item Fulfillment Labeling Workflow Action supports project billing review on Cash Sale records.

Purpose

This script supports project billing review for Cash Sale records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Cash Sale
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Item Fulfillment Labeling** ↗ - connected through the project billing review process.
- **cash-sale** ↗ - connected through the project billing review process.

Purchase Price Variance Review Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_renewal_opportunity_routing_workflow_action_06`

Purchase Price Variance Review Workflow Action supports renewal opportunity routing on Expense Report records.

Purpose

This script supports renewal opportunity routing for Expense Report records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Expense Report
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Purchase Price Variance Review** ↗ - connected through the renewal opportunity routing process.
- **expense-report** ↗ - connected through the renewal opportunity routing process.

Customer Deposit Matching Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_sales_order_risk_review_workflow_action_01`

Customer Deposit Matching Workflow Action supports sales order risk review on Account records.

Purpose

This script supports sales order risk review for Account records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Account
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Deposit Matching** ↗ - connected through the sales order risk review process.
- **account** ↗ - connected through the sales order risk review process.

Customer Credit Recheck Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_shipping_exception_alerts_workflow_action_04`

Customer Credit Recheck Workflow Action supports shipping exception alerts on Lead records.

Purpose

This script supports shipping exception alerts for Lead records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Lead
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the shipping exception alerts process.
- **lead** ↗ - connected through the shipping exception alerts process.

Partner Referral Tracking Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_vendor_bill_exception_review_workflow_action_03`

Partner Referral Tracking Workflow Action supports vendor bill exception review on Class records.

Purpose

This script supports vendor bill exception review for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Class
Status	Released
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Partner Referral Tracking** ↗ - connected through the vendor bill exception review process.
- **class** ↗ - connected through the vendor bill exception review process.

Drop Ship Coordination Workflow Action

Source: `Scripts/Workflow-Action-Script/customscript_demo_warehouse_transfer_controls_workflow_action_11`

Drop Ship Coordination Workflow Action supports warehouse transfer controls on Class records.

Purpose

This script supports warehouse transfer controls for Class records. It reads setup fields, applies validation, and updates process status when records meet the configured conditions.

Behavior

- Reads the current record and related configuration fields.
- Validates the record against the process rules documented on this page.
- Updates status, queue, or review fields used by saved searches and workflows.
- Logs skipped records with enough detail for support review.

Runtime and deployment

AREA	SETTING
Script type	Workflow Action Script
Deployed to	Class
Status	Testing
Log level	Audit

Operational notes

- Review linked fields and searches before changing this script.
- Test with a small set of records before enabling broad changes.
- Check execution logs after deployment changes.

Related configuration

This object references:

- **Drop Ship Coordination** ↗ - connected through the warehouse transfer controls process.
- **class** ↗ - connected through the warehouse transfer controls process.

SECTION

Workflows

Workflow configuration and operational notes.

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Workflows contents

Workflow configuration and operational notes.

DOCUMENT	SOURCE
Vendor Onboarding Review Workflow ↗	Workflows/customworkflow_demo_backorder_review_queue
Vendor Compliance Checks Workflow ↗	Workflows/customworkflow_demo_billing_schedule_monitor
Sales Order Risk Review Workflow ↗	Workflows/customworkflow_demo_campaign_response_routing
Service Case SLA Tracking Workflow ↗	Workflows/customworkflow_demo_case_escalation_management
Vendor Bill Exception Review Workflow ↗	Workflows/customworkflow_demo_contract_renewal_alerts
Serialized Item Compliance Workflow ↗	Workflows/customworkflow_demo_credit_hold_review
Tax Code Review Workflow ↗	Workflows/customworkflow_demo_customer_credit_recheck
Vendor Compliance Checks Workflow ↗	Workflows/customworkflow_demo_customer_onboarding_controls
Shipping Method Validation Workflow ↗	Workflows/customworkflow_demo_customer_tier_management
Shipping Exception Alerts Workflow ↗	Workflows/customworkflow_demo_demo_core_utilities
Service Case SLA Tracking Workflow ↗	Workflows/customworkflow_demo_drop_ship_coordination
Sales Rep Assignment Rules Workflow ↗	Workflows/customworkflow_demo_employee_approval_limits
Support Case Routing Workflow ↗	Workflows/customworkflow_demo_expense_approval_routing
Service Case SLA Tracking Workflow ↗	Workflows/customworkflow_demo_forecast_adjustment_review
Sales Order Risk Review Workflow ↗	Workflows/customworkflow_demo_fulfillment_hold_automation
Tax Code Review Workflow ↗	Workflows/customworkflow_demo_inventory_reorder_alerts
Revenue Recognition Review Workflow ↗	Workflows/customworkflow_demo_invoice_delivery_preferences
Sales Rep Assignment Rules Workflow ↗	Workflows/customworkflow_demo_invoice_queue_automation
Revenue Recognition Review Workflow ↗	Workflows/customworkflow_demo_item_fulfillment_controls
Support Case Routing Workflow ↗	Workflows/customworkflow_demo_item_margin_guardrails
Shipping Exception Alerts Workflow ↗	Workflows/customworkflow_demo_order_approval_workflow
Warehouse Transfer Controls Workflow ↗	Workflows/customworkflow_demo_payment_application_review
Revenue Recognition Review Workflow ↗	Workflows/customworkflow_demo_pricing_review_process
Shipping Method Validation Workflow ↗	Workflows/customworkflow_demo_project_billing_review
Serialized Item Compliance Workflow ↗	Workflows/customworkflow_demo_project_task_assignment
Sales Tax Exception Review Workflow ↗	Workflows/customworkflow_demo_purchase_order_closeout
Return Authorization Processing Workflow ↗	Workflows/customworkflow_demo_purchase_request_approval
Tax Code Review Workflow ↗	Workflows/customworkflow_demo_quote_expiration_monitoring

DOCUMENT	SOURCE
Sales Order Risk Review Workflow ↗	Workflows/customworkflow_demo_renewal_opportunity_routing
Shipping Exception Alerts Workflow ↗	Workflows/customworkflow_demo_return_authorization_processing
Support Case Routing Workflow ↗	Workflows/customworkflow_demo_revenue_recognition_review
Vendor Compliance Checks Workflow ↗	Workflows/customworkflow_demo_sales_order_risk_review
Vendor Onboarding Review Workflow ↗	Workflows/customworkflow_demo_serialized_item_compliance
Shipping Method Validation Workflow ↗	Workflows/customworkflow_demo_service_case_sla_tracking
Warehouse Transfer Controls Workflow ↗	Workflows/customworkflow_demo_shipping_exception_alerts
Vendor Onboarding Review Workflow ↗	Workflows/customworkflow_demo_shipping_method_validation
Sales Tax Exception Review Workflow ↗	Workflows/customworkflow_demo_support_case_routing
Sales Rep Assignment Rules Workflow ↗	Workflows/customworkflow_demo_support_intake_triage
Vendor Bill Exception Review Workflow ↗	Workflows/customworkflow_demo_tax_code_review
Warehouse Transfer Controls Workflow ↗	Workflows/customworkflow_demo_vendor_bill_exception_review
Vendor Bill Exception Review Workflow ↗	Workflows/customworkflow_demo_vendor_compliance_checks
Serialized Item Compliance Workflow ↗	Workflows/customworkflow_demo_vendor_onboarding_review
Sales Tax Exception Review Workflow ↗	Workflows/customworkflow_demo_vendor_payment_release

Vendor Onboarding Review Workflow

Source: `Workflows/customworkflow_demo_backorder_review_queue`

Vendor Onboarding Review Workflow routes Opportunity records through the backorder review queue process.

Purpose

This workflow controls routing and status updates for Opportunity records in the backorder review queue process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Opportunity
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Onboarding Review** ↗ - connected through the backorder review queue process.
- **opportunity** ↗ - connected through the backorder review queue process.

Vendor Compliance Checks Workflow

Source: `Workflows/customworkflow_demo_billing_schedule_monitor`

Vendor Compliance Checks Workflow routes Kit Item records through the billing schedule monitor process.

Purpose

This workflow controls routing and status updates for Kit Item records in the billing schedule monitor process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Kit Item
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Compliance Checks** ↗ - connected through the billing schedule monitor process.
- **kit-item** ↗ - connected through the billing schedule monitor process.

Sales Order Risk Review Workflow

Source: `Workflows/customworkflow_demo_campaign_response_routing`

Sales Order Risk Review Workflow routes Prospect records through the campaign response routing process.

Purpose

This workflow controls routing and status updates for Prospect records in the campaign response routing process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Prospect
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Order Risk Review** ↗ - connected through the campaign response routing process.
- **prospect** ↗ - connected through the campaign response routing process.

Service Case SLA Tracking Workflow

Source: `Workflows/customworkflow_demo_case_escalation_management`

Service Case SLA Tracking Workflow routes Journal Entry records through the case escalation management process.

Purpose

This workflow controls routing and status updates for Journal Entry records in the case escalation management process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Journal Entry
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Service Case SLA Tracking** ↗ - connected through the case escalation management process.
- **journal-entry** ↗ - connected through the case escalation management process.

Vendor Bill Exception Review Workflow

Source: `Workflows/customworkflow_demo_contract_renewal_alerts`

Vendor Bill Exception Review Workflow routes Inventory Transfer records through the contract renewal alerts process.

Purpose

This workflow controls routing and status updates for Inventory Transfer records in the contract renewal alerts process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Inventory Transfer
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Bill Exception Review** ↗ - connected through the contract renewal alerts process.
- **inventory-transfer** ↗ - connected through the contract renewal alerts process.

Serialized Item Compliance Workflow

Source: `Workflows/customworkflow_demo_credit_hold_review`

Serialized Item Compliance Workflow routes Return Authorization records through the credit hold review process.

Purpose

This workflow controls routing and status updates for Return Authorization records in the credit hold review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Return Authorization
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Serialized Item Compliance** ↗ - connected through the credit hold review process.
- **return-authorization** ↗ - connected through the credit hold review process.

Tax Code Review Workflow

Source: `Workflows/customworkflow_demo_customer_credit_recheck`

Tax Code Review Workflow routes Purchase Requisition records through the customer credit recheck process.

Purpose

This workflow controls routing and status updates for Purchase Requisition records in the customer credit recheck process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Purchase Requisition
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Tax Code Review** ↗ - connected through the customer credit recheck process.
- **purchase-requisition** ↗ - connected through the customer credit recheck process.

Vendor Compliance Checks Workflow

Source: `Workflows/customworkflow_demo_customer_onboarding_controls`

Vendor Compliance Checks Workflow routes Customer records through the customer onboarding controls process.

Purpose

This workflow controls routing and status updates for Customer records in the customer onboarding controls process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Customer
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Compliance Checks** ↗ - connected through the customer onboarding controls process.
- **customer** ↗ - connected through the customer onboarding controls process.

Shipping Method Validation Workflow

Source: `Workflows/customworkflow_demo_customer_tier_management`

Shipping Method Validation Workflow routes Work Order records through the customer tier management process.

Purpose

This workflow controls routing and status updates for Work Order records in the customer tier management process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Work Order
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Shipping Method Validation** ↗ - connected through the customer tier management process.
- **work-order** ↗ - connected through the customer tier management process.

Shipping Exception Alerts Workflow

Source: `Workflows/customworkflow_demo_demo_core_utilities`

Shipping Exception Alerts Workflow routes Inventory Item records through the demo core utilities process.

Purpose

This workflow controls routing and status updates for Inventory Item records in the demo core utilities process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Inventory Item
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Shipping Exception Alerts** ↗ - connected through the demo core utilities process.
- **inventory-item** ↗ - connected through the demo core utilities process.

Service Case SLA Tracking Workflow

Source: `Workflows/customworkflow_demo_drop_ship_coordination`

Service Case SLA Tracking Workflow routes Customer Payment records through the drop ship coordination process.

Purpose

This workflow controls routing and status updates for Customer Payment records in the drop ship coordination process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Customer Payment
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Service Case SLA Tracking** ↗ - connected through the drop ship coordination process.
- **customer-payment** ↗ - connected through the drop ship coordination process.

Sales Rep Assignment Rules Workflow

Source: `Workflows/customworkflow_demo_employee_approval_limits`

Sales Rep Assignment Rules Workflow routes Project records through the employee approval limits process.

Purpose

This workflow controls routing and status updates for Project records in the employee approval limits process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Project
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Rep Assignment Rules** ↗ - connected through the employee approval limits process.
- **project** ↗ - connected through the employee approval limits process.

Support Case Routing Workflow

Source: `Workflows/customworkflow_demo_expense_approval_routing`

Support Case Routing Workflow routes Campaign records through the expense approval routing process.

Purpose

This workflow controls routing and status updates for Campaign records in the expense approval routing process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Campaign
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Support Case Routing** ↗ - connected through the expense approval routing process.
- **campaign** ↗ - connected through the expense approval routing process.

Service Case SLA Tracking Workflow

Source: `Workflows/customworkflow_demo_forecast_adjustment_review`

Service Case SLA Tracking Workflow routes Non-inventory Item records through the forecast adjustment review process.

Purpose

This workflow controls routing and status updates for Non-inventory Item records in the forecast adjustment review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Non-inventory Item
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Service Case SLA Tracking** ↗ - connected through the forecast adjustment review process.
- **non-inventory-item** ↗ - connected through the forecast adjustment review process.

Sales Order Risk Review Workflow

Source: `Workflows/customworkflow_demo_fulfillment_hold_automation`

Sales Order Risk Review Workflow routes Phone Call records through the fulfillment hold automation process.

Purpose

This workflow controls routing and status updates for Phone Call records in the fulfillment hold automation process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Phone Call
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Order Risk Review** ↗ - connected through the fulfillment hold automation process.
- **phone-call** ↗ - connected through the fulfillment hold automation process.

Tax Code Review Workflow

Source: `Workflows/customworkflow_demo_inventory_reorder_alerts`

Tax Code Review Workflow routes Vendor records through the inventory reorder alerts process.

Purpose

This workflow controls routing and status updates for Vendor records in the inventory reorder alerts process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Vendor
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Tax Code Review** ↗ - connected through the inventory reorder alerts process.
- **vendor** ↗ - connected through the inventory reorder alerts process.

Revenue Recognition Review Workflow

Source: `Workflows/customworkflow_demo_invoice_delivery_preferences`

Revenue Recognition Review Workflow routes Class records through the invoice delivery preferences process.

Purpose

This workflow controls routing and status updates for Class records in the invoice delivery preferences process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Class
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Revenue Recognition Review** ↗ - connected through the invoice delivery preferences process.
- **class** ↗ - connected through the invoice delivery preferences process.

Sales Rep Assignment Rules Workflow

Source: `Workflows/customworkflow_demo_invoice_queue_automation`

Sales Rep Assignment Rules Workflow routes Purchase Order records through the invoice queue automation process.

Purpose

This workflow controls routing and status updates for Purchase Order records in the invoice queue automation process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Purchase Order
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Rep Assignment Rules** ↗ - connected through the invoice queue automation process.
- **purchase-order** ↗ - connected through the invoice queue automation process.

Revenue Recognition Review Workflow

Source: `Workflows/customworkflow_demo_item_fulfillment_controls`

Revenue Recognition Review Workflow routes Estimate records through the item fulfillment controls process.

Purpose

This workflow controls routing and status updates for Estimate records in the item fulfillment controls process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Estimate
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Revenue Recognition Review** ↗ - connected through the item fulfillment controls process.
- **estimate** ↗ - connected through the item fulfillment controls process.

Support Case Routing Workflow

Source: `Workflows/customworkflow_demo_item_margin_guardrails`

Support Case Routing Workflow routes Contact records through the item margin guardrails process.

Purpose

This workflow controls routing and status updates for Contact records in the item margin guardrails process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Contact
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Support Case Routing** ↗ - connected through the item margin guardrails process.
- **contact** ↗ - connected through the item margin guardrails process.

Shipping Exception Alerts Workflow

Source: `Workflows/customworkflow_demo_order_approval_workflow`

Shipping Exception Alerts Workflow routes Sales Order records through the order approval workflow process.

Purpose

This workflow controls routing and status updates for Sales Order records in the order approval workflow process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Sales Order
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Shipping Exception Alerts** ↗ - connected through the order approval workflow process.
- **sales-order** ↗ - connected through the order approval workflow process.

Warehouse Transfer Controls Workflow

Source: `Workflows/customworkflow_demo_payment_application_review`

Warehouse Transfer Controls Workflow routes Cash Sale records through the payment application review process.

Purpose

This workflow controls routing and status updates for Cash Sale records in the payment application review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Cash Sale
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Warehouse Transfer Controls** ↗ - connected through the payment application review process.
- **cash-sale** ↗ - connected through the payment application review process.

Revenue Recognition Review Workflow

Source: `Workflows/customworkflow_demo_pricing_review_process`

Revenue Recognition Review Workflow routes Inventory Item records through the pricing review process process.

Purpose

This workflow controls routing and status updates for Inventory Item records in the pricing review process process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Inventory Item
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Revenue Recognition Review** ↗ - connected through the pricing review process process.
- **inventory-item** ↗ - connected through the pricing review process process.

Shipping Method Validation Workflow

Source: `Workflows/customworkflow_demo_project_billing_review`

Shipping Method Validation Workflow routes Task records through the project billing review process.

Purpose

This workflow controls routing and status updates for Task records in the project billing review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Task
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Shipping Method Validation** ↗ - connected through the project billing review process.
- **task** ↗ - connected through the project billing review process.

Serialized Item Compliance Workflow

Source: `Workflows/customworkflow_demo_project_task_assignment`

Serialized Item Compliance Workflow routes Customer records through the project task assignment process.

Purpose

This workflow controls routing and status updates for Customer records in the project task assignment process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Customer
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Serialized Item Compliance** ↗ - connected through the project task assignment process.
- **customer** ↗ - connected through the project task assignment process.

Sales Tax Exception Review Workflow

Source: `Workflows/customworkflow_demo_purchase_order_closeout`

Sales Tax Exception Review Workflow routes Account records through the purchase order closeout process.

Purpose

This workflow controls routing and status updates for Account records in the purchase order closeout process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Account
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Tax Exception Review** ↗ - connected through the purchase order closeout process.
- **account** ↗ - connected through the purchase order closeout process.

Return Authorization Processing Workflow

Source: `Workflows/customworkflow_demo_purchase_request_approval`

Return Authorization Processing Workflow routes Employee records through the purchase request approval process.

Purpose

This workflow controls routing and status updates for Employee records in the purchase request approval process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Employee
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Return Authorization Processing** ↗ - connected through the purchase request approval process.
- **employee** ↗ - connected through the purchase request approval process.

Tax Code Review Workflow

Source: `Workflows/customworkflow_demo_quote_expiration_monitoring`

Tax Code Review Workflow routes Transfer Order records through the quote expiration monitoring process.

Purpose

This workflow controls routing and status updates for Transfer Order records in the quote expiration monitoring process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Transfer Order
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Tax Code Review** ↗ - connected through the quote expiration monitoring process.
- **transfer-order** ↗ - connected through the quote expiration monitoring process.

Sales Order Risk Review Workflow

Source: `Workflows/customworkflow_demo_renewal_opportunity_routing`

Sales Order Risk Review Workflow routes Expense Report records through the renewal opportunity routing process.

Purpose

This workflow controls routing and status updates for Expense Report records in the renewal opportunity routing process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Expense Report
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Order Risk Review** ↗ - connected through the renewal opportunity routing process.
- **expense-report** ↗ - connected through the renewal opportunity routing process.

Shipping Exception Alerts Workflow

Source: `Workflows/customworkflow_demo_return_authorization_processing`

Shipping Exception Alerts Workflow routes Vendor Bill records through the return authorization processing process.

Purpose

This workflow controls routing and status updates for Vendor Bill records in the return authorization processing process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Vendor Bill
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Shipping Exception Alerts** ↗ - connected through the return authorization processing process.
- **vendor-bill** ↗ - connected through the return authorization processing process.

Support Case Routing Workflow

Source: `Workflows/customworkflow_demo_revenue_recognition_review`

Support Case Routing Workflow routes Item Receipt records through the revenue recognition review process.

Purpose

This workflow controls routing and status updates for Item Receipt records in the revenue recognition review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Item Receipt
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Support Case Routing** ↗ - connected through the revenue recognition review process.
- **item-receipt** ↗ - connected through the revenue recognition review process.

Vendor Compliance Checks Workflow

Source: `Workflows/customworkflow_demo_sales_order_risk_review`

Vendor Compliance Checks Workflow routes Support Case records through the sales order risk review process.

Purpose

This workflow controls routing and status updates for Support Case records in the sales order risk review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Support Case
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Compliance Checks** ↗ - connected through the sales order risk review process.
- **support-case** ↗ - connected through the sales order risk review process.

Vendor Onboarding Review Workflow

Source: `Workflows/customworkflow_demo_serialized_item_compliance`

Vendor Onboarding Review Workflow routes Shipping Item records through the serialized item compliance process.

Purpose

This workflow controls routing and status updates for Shipping Item records in the serialized item compliance process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Shipping Item
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Onboarding Review** ↗ - connected through the serialized item compliance process.
- **shipping-item** ↗ - connected through the serialized item compliance process.

Shipping Method Validation Workflow

Source: `Workflows/customworkflow_demo_service_case_sla_tracking`

Shipping Method Validation Workflow routes Location records through the service case sla tracking process.

Purpose

This workflow controls routing and status updates for Location records in the service case sla tracking process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Location
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Shipping Method Validation** ↗ - connected through the service case sla tracking process.
- **location** ↗ - connected through the service case sla tracking process.

Warehouse Transfer Controls Workflow

Source: `Workflows/customworkflow_demo_shipping_exception_alerts`

Warehouse Transfer Controls Workflow routes Lead records through the shipping exception alerts process.

Purpose

This workflow controls routing and status updates for Lead records in the shipping exception alerts process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Lead
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Warehouse Transfer Controls** ↗ - connected through the shipping exception alerts process.
- **lead** ↗ - connected through the shipping exception alerts process.

Vendor Onboarding Review Workflow

Source: `Workflows/customworkflow_demo_shipping_method_validation`

Vendor Onboarding Review Workflow routes Lot Numbered Item records through the shipping method validation process.

Purpose

This workflow controls routing and status updates for Lot Numbered Item records in the shipping method validation process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Lot Numbered Item
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Onboarding Review** ↗ - connected through the shipping method validation process.
- **lot-numbered-item** ↗ - connected through the shipping method validation process.

Sales Tax Exception Review Workflow

Source: `Workflows/customworkflow_demo_support_case_routing`

Sales Tax Exception Review Workflow routes Item Fulfillment records through the support case routing process.

Purpose

This workflow controls routing and status updates for Item Fulfillment records in the support case routing process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Item Fulfillment
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Tax Exception Review** ↗ - connected through the support case routing process.
- **item-fulfillment** ↗ - connected through the support case routing process.

Sales Rep Assignment Rules Workflow

Source: `Workflows/customworkflow_demo_support_intake_triage`

Sales Rep Assignment Rules Workflow routes Term records through the support intake triage process.

Purpose

This workflow controls routing and status updates for Term records in the support intake triage process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Term
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Rep Assignment Rules** ↗ - connected through the support intake triage process.
- **term** ↗ - connected through the support intake triage process.

Vendor Bill Exception Review Workflow

Source: `Workflows/customworkflow_demo_tax_code_review`

Vendor Bill Exception Review Workflow routes Calendar Event records through the tax code review process.

Purpose

This workflow controls routing and status updates for Calendar Event records in the tax code review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Calendar Event
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Bill Exception Review** ↗ - connected through the tax code review process.
- **calendar-event** ↗ - connected through the tax code review process.

Warehouse Transfer Controls Workflow

Source: `Workflows/customworkflow_demo_vendor_bill_exception_review`

Warehouse Transfer Controls Workflow routes Assembly Build records through the vendor bill exception review process.

Purpose

This workflow controls routing and status updates for Assembly Build records in the vendor bill exception review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Assembly Build
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Warehouse Transfer Controls** ↗ - connected through the vendor bill exception review process.
- **assembly-build** ↗ - connected through the vendor bill exception review process.

Vendor Bill Exception Review Workflow

Source: `Workflows/customworkflow_demo_vendor_compliance_checks`

Vendor Bill Exception Review Workflow routes Invoice records through the vendor compliance checks process.

Purpose

This workflow controls routing and status updates for Invoice records in the vendor compliance checks process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Invoice
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Vendor Bill Exception Review** ↗ - connected through the vendor compliance checks process.
- **invoice** ↗ - connected through the vendor compliance checks process.

Serialized Item Compliance Workflow

Source: `Workflows/customworkflow_demo_vendor_onboarding_review`

Serialized Item Compliance Workflow routes Vendor Return records through the vendor onboarding review process.

Purpose

This workflow controls routing and status updates for Vendor Return records in the vendor onboarding review process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Vendor Return
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Serialized Item Compliance** ↗ - connected through the vendor onboarding review process.
- **vendor-return** ↗ - connected through the vendor onboarding review process.

Sales Tax Exception Review Workflow

Source: `Workflows/customworkflow_demo_vendor_payment_release`

Sales Tax Exception Review Workflow routes Sales Order records through the vendor payment release process.

Purpose

This workflow controls routing and status updates for Sales Order records in the vendor payment release process.

Behavior

- Evaluates record status and required fields before moving to the next step.
- Sets review fields used by saved searches and dashboard queues.
- Sends reminders when records remain unresolved.

Runtime and deployment

AREA	SETTING
Record type	Sales Order
Trigger	On create and edit
Release status	Released

Operational notes

- Review workflow states before changing approval fields.
- Test transitions with open records before changing release status.

Related configuration

This object references:

- **Sales Tax Exception Review** ↗ - connected through the vendor payment release process.
- **sales-order** ↗ - connected through the vendor payment release process.

SECTION

Custom fields

Entity, item, transaction, CRM, and other custom field configuration.

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Custom fields contents

Entity, item, transaction, CRM, and other custom field configuration.

DOCUMENT	SOURCE
Inventory Reorder Alerts Owner ↗	Custom-Fields/CRM/custevent_demo_billing_schedule_monitor_10
Invoice Queue Automation Routing Group ↗	Custom-Fields/CRM/custevent_demo_campaign_response_routing_06
Inventory Reorder Alerts Status ↗	Custom-Fields/CRM/custevent_demo_cash_sale_exception_review_09
Inventory Reorder Alerts Priority ↗	Custom-Fields/CRM/custevent_demo_customer_duplicate_review_03
Customer Onboarding Controls Hold Reason ↗	Custom-Fields/CRM/custevent_demo_expense_approval_routing_04
Customer Onboarding Controls Approval Level ↗	Custom-Fields/CRM/custevent_demo_forecast_adjustment_review_08
Invoice Queue Automation Owner ↗	Custom-Fields/CRM/custevent_demo_invoice_delivery_preferences_02
Customer Onboarding Controls Status ↗	Custom-Fields/CRM/custevent_demo_item_fulfillment_labeling_17
Inventory Reorder Alerts Review Date ↗	Custom-Fields/CRM/custevent_demo_journal_approval_controls_05
Invoice Queue Automation Exception Flag ↗	Custom-Fields/CRM/custevent_demo_order_change_audit_15
Inventory Reorder Alerts Exception Flag ↗	Custom-Fields/CRM/custevent_demo_partner_referral_tracking_07
Customer Onboarding Controls Priority ↗	Custom-Fields/CRM/custevent_demo_price_level_governance_11
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/CRM/custevent_demo_purchase_order_closeout_16
Inventory Reorder Alerts Review Date ↗	Custom-Fields/CRM/custevent_demo_sales_tax_exception_review_13
Inventory Reorder Alerts Owner ↗	Custom-Fields/CRM/custevent_demo_serialized_item_compliance_18
Inventory Reorder Alerts Hold Reason ↗	Custom-Fields/CRM/custevent_demo_shipping_method_validation_12
Invoice Queue Automation Routing Group ↗	Custom-Fields/CRM/custevent_demo_support_intake_triage_14
Inventory Reorder Alerts Status ↗	Custom-Fields/CRM/custevent_demo_warehouse_transfer_controls_01
Customer Onboarding Controls Review Date ↗	Custom-Fields/Entity/custentity_demo_billing_schedule_monitor_29
Invoice Queue Automation Status ↗	Custom-Fields/Entity/custentity_demo_campaign_response_routing_25
Invoice Queue Automation Routing Group ↗	Custom-Fields/Entity/custentity_demo_case_escalation_management_06
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Entity/custentity_demo_cash_sale_exception_review_28

DOCUMENT	SOURCE
Invoice Queue Automation Routing Group ↗	Custom-Fields/Entity/custentity_demo_commission_eligibility_flags_14
Order Approval Workflow Status ↗	Custom-Fields/Entity/custentity_demo_contract_renewal_alerts_17
Customer Onboarding Controls Priority ↗	Custom-Fields/Entity/custentity_demo_customer_credit_recheck_11
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Entity/custentity_demo_customer_deposit_matching_38
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Entity/custentity_demo_customer_duplicate_review_22
Inventory Reorder Alerts Status ↗	Custom-Fields/Entity/custentity_demo_drop_ship_coordination_09
Customer Onboarding Controls Status ↗	Custom-Fields/Entity/custentity_demo_employee_approval_limits_01
Inventory Reorder Alerts Exception Flag ↗	Custom-Fields/Entity/custentity_demo_expense_approval_routing_23
Inventory Reorder Alerts Priority ↗	Custom-Fields/Entity/custentity_demo_forecast_adjustment_review_27
Inventory Reorder Alerts Hold Reason ↗	Custom-Fields/Entity/custentity_demo_fulfillment_hold_automation_04
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Entity/custentity_demo_inventory_count_reconciliation_08
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Entity/custentity_demo_inventory_transfer_review_40
Customer Onboarding Controls Review Date ↗	Custom-Fields/Entity/custentity_demo_invoice_delivery_preferences_21
Customer Onboarding Controls Hold Reason ↗	Custom-Fields/Entity/custentity_demo_item_fulfillment_labeling_36
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Entity/custentity_demo_item_master_governance_16
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Entity/custentity_demo_journal_approval_controls_24
Customer Onboarding Controls Owner ↗	Custom-Fields/Entity/custentity_demo_order_change_audit_34
Inventory Reorder Alerts Owner ↗	Custom-Fields/Entity/custentity_demo_partner_referral_tracking_26
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Entity/custentity_demo_payment_application_review_07
Order Approval Workflow Routing Group ↗	Custom-Fields/Entity/custentity_demo_price_level_governance_30
Invoice Queue Automation Owner ↗	Custom-Fields/Entity/custentity_demo_project_billing_review_02
Inventory Reorder Alerts Priority ↗	Custom-Fields/Entity/custentity_demo_purchase_order_closeout_35

DOCUMENT	SOURCE
Customer Onboarding Controls Owner ↗	Custom-Fields/Entity/custentity_demo_purchase_price_variance_review_10
Order Approval Workflow Owner ↗	Custom-Fields/Entity/custentity_demo_quote_approval_matrix_18
Invoice Queue Automation Review Date ↗	Custom-Fields/Entity/custentity_demo_renewal_opportunity_routing_05
Invoice Queue Automation Review Date ↗	Custom-Fields/Entity/custentity_demo_revenue_recognition_review_13
Inventory Reorder Alerts Hold Reason ↗	Custom-Fields/Entity/custentity_demo_sales_rep_assignment_rules_12
Invoice Queue Automation Approval Level ↗	Custom-Fields/Entity/custentity_demo_sales_tax_exception_review_32
Inventory Reorder Alerts Review Date ↗	Custom-Fields/Entity/custentity_demo_serialized_item_compliance_37
Invoice Queue Automation Priority ↗	Custom-Fields/Entity/custentity_demo_service_case_sla_tracking_19
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Entity/custentity_demo_shipping_method_validation_31
Customer Onboarding Controls Status ↗	Custom-Fields/Entity/custentity_demo_support_intake_triage_33
Invoice Queue Automation Priority ↗	Custom-Fields/Entity/custentity_demo_tax_code_review_03
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Entity/custentity_demo_vendor_onboarding_review_15
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Entity/custentity_demo_vendor_payment_release_39
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Entity/custentity_demo_warehouse_transfer_controls_20
Customer Onboarding Controls Review Date ↗	Custom-Fields/Item-Number/custitemnumber_demo_case_follow_up_reminder_05
Invoice Queue Automation Status ↗	Custom-Fields/Item-Number/custitemnumber_demo_customer_deposit_matching_01
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Item-Number/custitemnumber_demo_demo_core_utilities_06
Customer Onboarding Controls Priority ↗	Custom-Fields/Item-Number/custitemnumber_demo_inventory_transfer_review_03
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Item-Number/custitemnumber_demo_invoice_queue_automation_08
Inventory Reorder Alerts Exception Flag ↗	Custom-Fields/Item-Number/custitemnumber_demo_order_approval_workflow_07

DOCUMENT	SOURCE
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Item-Number/custitemnumber_demo_project_task_assignment_04
Customer Onboarding Controls Owner ↗	Custom-Fields/Item-Number/custitemnumber_demo_vendor_payment_release_02
Inventory Reorder Alerts Status ↗	Custom-Fields/Item-Option/custcol_demo_option_customer_onboarding_controls_01
Customer Onboarding Controls Owner ↗	Custom-Fields/Item-Option/custcol_demo_option_inventory_reorder_alerts_02
Order Approval Workflow Approval Level ↗	Custom-Fields/Item-Option/custcol_demo_option_item_fulfillment_controls_08
Customer Onboarding Controls Priority ↗	Custom-Fields/Item-Option/custcol_demo_option_pricing_review_process_03
Inventory Reorder Alerts Exception Flag ↗	Custom-Fields/Item-Option/custcol_demo_option_purchase_request_approval_07
Invoice Queue Automation Routing Group ↗	Custom-Fields/Item-Option/custcol_demo_option_sales_order_risk_review_06
Inventory Reorder Alerts Review Date ↗	Custom-Fields/Item-Option/custcol_demo_option_support_case_routing_05
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Item-Option/custcol_demo_option_vendor_compliance_checks_04
Invoice Queue Automation Priority ↗	Custom-Fields/Item/custitem_demo_backorder_review_queue_19
Invoice Queue Automation Priority ↗	Custom-Fields/Item/custitem_demo_case_escalation_management_27
Order Approval Workflow Owner ↗	Custom-Fields/Item/custitem_demo_case_follow_up_reminder_02
Customer Onboarding Controls Priority ↗	Custom-Fields/Item/custitem_demo_commission_eligibility_flags_35
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Item/custitem_demo_contract_renewal_alerts_38
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Item/custitem_demo_credit_hold_review_14
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Item/custitem_demo_customer_credit_recheck_32
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Item/custitem_demo_customer_onboarding_controls_06
Invoice Queue Automation Approval Level ↗	Custom-Fields/Item/custitem_demo_customer_tier_management_16
Inventory Reorder Alerts Priority ↗	Custom-Fields/Item/custitem_demo_demo_core_utilities_03
Invoice Queue Automation Routing Group ↗	Custom-Fields/Item/custitem_demo_drop_ship_coordination_30

DOCUMENT	SOURCE
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Item/custitem_demo_employee_approval_limits_22
Inventory Reorder Alerts Status ↗	Custom-Fields/Item/custitem_demo_fulfillment_hold_automation_25
Order Approval Workflow Review Date ↗	Custom-Fields/Item/custitem_demo_inventory_count_reconciliation_29
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Item/custitem_demo_inventory_reorder_alerts_07
Customer Onboarding Controls Review Date ↗	Custom-Fields/Item/custitem_demo_invoice_queue_automation_05
Invoice Queue Automation Review Date ↗	Custom-Fields/Item/custitem_demo_item_fulfillment_controls_13
Invoice Queue Automation Review Date ↗	Custom-Fields/Item/custitem_demo_item_margin_guardrails_21
Inventory Reorder Alerts Review Date ↗	Custom-Fields/Item/custitem_demo_item_master_governance_37
Order Approval Workflow Hold Reason ↗	Custom-Fields/Item/custitem_demo_order_approval_workflow_04
Customer Onboarding Controls Hold Reason ↗	Custom-Fields/Item/custitem_demo_payment_application_review_28
Invoice Queue Automation Approval Level ↗	Custom-Fields/Item/custitem_demo_pricing_review_process_08
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Item/custitem_demo_project_billing_review_23
Customer Onboarding Controls Status ↗	Custom-Fields/Item/custitem_demo_project_task_assignment_01
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Item/custitem_demo_purchase_price_variance_review_31
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Item/custitem_demo_purchase_request_approval_12
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Item/custitem_demo_quote_approval_matrix_39
Customer Onboarding Controls Owner ↗	Custom-Fields/Item/custitem_demo_quote_expiration_monitoring_18
Inventory Reorder Alerts Owner ↗	Custom-Fields/Item/custitem_demo_renewal_opportunity_routing_26
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Item/custitem_demo_return_authorization_processing_15
Inventory Reorder Alerts Owner ↗	Custom-Fields/Item/custitem_demo_revenue_recognition_review_34
Order Approval Workflow Priority ↗	Custom-Fields/Item/custitem_demo_sales_order_risk_review_11
Customer Onboarding Controls Status ↗	Custom-Fields/Item/custitem_demo_sales_rep_assignment_rules_33
Order Approval Workflow Approval Level ↗	Custom-Fields/Item/custitem_demo_service_case_sla_tracking_40

DOCUMENT	SOURCE
Inventory Reorder Alerts Hold Reason ↗	Custom-Fields/Item/custitem_demo_shipping_exception_alerts_20
Inventory Reorder Alerts Owner ↗	Custom-Fields/Item/custitem_demo_support_case_routing_10
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Item/custitem_demo_tax_code_review_24
Customer Onboarding Controls Status ↗	Custom-Fields/Item/custitem_demo_vendor_bill_exception_review_17
Inventory Reorder Alerts Status ↗	Custom-Fields/Item/custitem_demo_vendor_compliance_checks_09
Customer Onboarding Controls Hold Reason ↗	Custom-Fields/Item/custitem_demo_vendor_onboarding_review_36
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Other/custrecord_demo_backorder_review_queue_06
Order Approval Workflow Status ↗	Custom-Fields/Other/custrecord_demo_credit_hold_review_01
Invoice Queue Automation Priority ↗	Custom-Fields/Other/custrecord_demo_customer_tier_management_03
Customer Onboarding Controls Review Date ↗	Custom-Fields/Other/custrecord_demo_quote_expiration_monitoring_05
Inventory Reorder Alerts Owner ↗	Custom-Fields/Other/custrecord_demo_return_authorization_processing_02
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Other/custrecord_demo_shipping_exception_alerts_07
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Other/custrecord_demo_vendor_bill_exception_review_04
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_backorder_review_queue_16
Inventory Reorder Alerts Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_backorder_review_queue_77
Order Approval Workflow Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_billing_schedule_monitor_47
Order Approval Workflow Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_campaign_response_routing_43
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_case_escalation_management_24
Order Approval Workflow Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_case_follow_up_reminder_60
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_cash_sale_exception_review_46
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_commission_eligibility_flags_32

DOCUMENT	SOURCE
Invoice Queue Automation Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_contract_renewal_alerts_35
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_credit_hold_review_11
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_credit_hold_review_72
Customer Onboarding Controls Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_customer_credit_recheck_29
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_customer_deposit_matching_56
Invoice Queue Automation Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_customer_duplicate_review_40
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_customer_onboarding_controls_03
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_customer_onboarding_controls_64
Customer Onboarding Controls Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_customer_tier_management_13
Inventory Reorder Alerts Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_customer_tier_management_74
Invoice Queue Automation Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_demo_core_utilities_61
Invoice Queue Automation Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_drop_ship_coordination_27
Inventory Reorder Alerts Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_employee_approval_limits_19
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_employee_approval_limits_80
Inventory Reorder Alerts Status ↗	Custom-Fields/Transaction-Body/custbody_demo_expense_approval_routing_41
Invoice Queue Automation Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_forecast_adjustment_review_45
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_fulfillment_hold_automation_22
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_inventory_count_reconciliation_26
Customer Onboarding Controls Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_inventory_reorder_alerts_04

DOCUMENT	SOURCE
Inventory Reorder Alerts Status ↗	Custom-Fields/Transaction-Body/custbody_demo_inventory_reorder_alerts_65
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_inventory_transfer_review_58
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_invoice_delivery_preferences_39
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_invoice_queue_automation_02
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_invoice_queue_automation_63
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_item_fulfillment_controls_10
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_item_fulfillment_controls_71
Invoice Queue Automation Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_item_fulfillment_labeling_54
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_item_margin_guardrails_18
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_item_margin_guardrails_79
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_item_master_governance_34
Inventory Reorder Alerts Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_journal_approval_controls_42
Customer Onboarding Controls Status ↗	Custom-Fields/Transaction-Body/custbody_demo_order_approval_workflow_01
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_order_approval_workflow_62
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_order_change_audit_52
Customer Onboarding Controls Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_partner_referral_tracking_44
Invoice Queue Automation Status ↗	Custom-Fields/Transaction-Body/custbody_demo_payment_application_review_25
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_price_level_governance_48
Invoice Queue Automation Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_pricing_review_process_05

DOCUMENT	SOURCE
Invoice Queue Automation Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_pricing_review_process_66
Inventory Reorder Alerts Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_project_billing_review_20
Inventory Reorder Alerts Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_project_task_assignment_59
Order Approval Workflow Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_purchase_order_closeout_53
Order Approval Workflow Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_purchase_price_variance_review_28
Invoice Queue Automation Status ↗	Custom-Fields/Transaction-Body/custbody_demo_purchase_request_approval_09
Invoice Queue Automation Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_purchase_request_approval_70
Order Approval Workflow Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_quote_approval_matrix_36
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_quote_expiration_monitoring_15
Inventory Reorder Alerts Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_quote_expiration_monitoring_76
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_renewal_opportunity_routing_23
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_return_authorization_processing_12
Customer Onboarding Controls Status ↗	Custom-Fields/Transaction-Body/custbody_demo_return_authorization_processing_73
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_revenue_recognition_review_31
Order Approval Workflow Approval Level ↗	Custom-Fields/Transaction-Body/custbody_demo_sales_order_risk_review_08
Order Approval Workflow Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_sales_order_risk_review_69
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_sales_rep_assignment_rules_30
Inventory Reorder Alerts Owner ↗	Custom-Fields/Transaction-Body/custbody_demo_sales_tax_exception_review_50
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_serialized_item_compliance_55

DOCUMENT	SOURCE
Customer Onboarding Controls Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_service_case_sla_tracking_37
Invoice Queue Automation Status ↗	Custom-Fields/Transaction-Body/custbody_demo_shipping_exception_alerts_17
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_shipping_exception_alerts_78
Inventory Reorder Alerts Status ↗	Custom-Fields/Transaction-Body/custbody_demo_shipping_method_validation_49
Inventory Reorder Alerts Exception Flag ↗	Custom-Fields/Transaction-Body/custbody_demo_support_case_routing_07
Inventory Reorder Alerts Hold Reason ↗	Custom-Fields/Transaction-Body/custbody_demo_support_case_routing_68
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_support_intake_triage_51
Inventory Reorder Alerts Review Date ↗	Custom-Fields/Transaction-Body/custbody_demo_tax_code_review_21
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_vendor_bill_exception_review_14
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_vendor_bill_exception_review_75
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_vendor_compliance_checks_06
Inventory Reorder Alerts Priority ↗	Custom-Fields/Transaction-Body/custbody_demo_vendor_compliance_checks_67
Customer Onboarding Controls Status ↗	Custom-Fields/Transaction-Body/custbody_demo_vendor_onboarding_review_33
Inventory Reorder Alerts Status ↗	Custom-Fields/Transaction-Body/custbody_demo_vendor_payment_release_57
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Transaction-Body/custbody_demo_warehouse_transfer_controls_38
Invoice Queue Automation Owner ↗	Custom-Fields/Transaction-Column/custcol_demo_backorder_review_queue_58
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Transaction-Column/custcol_demo_billing_schedule_monitor_28
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Column/custcol_demo_campaign_response_routing_24
Inventory Reorder Alerts Review Date ↗	Custom-Fields/Transaction-Column/custcol_demo_case_escalation_management_05

DOCUMENT	SOURCE
Customer Onboarding Controls Status ↗	Custom-Fields/Transaction-Column/custcol_demo_case_follow_up_reminder_41
Order Approval Workflow Priority ↗	Custom-Fields/Transaction-Column/custcol_demo_cash_sale_exception_review_27
Customer Onboarding Controls Review Date ↗	Custom-Fields/Transaction-Column/custcol_demo_commission_eligibility_flags_13
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Column/custcol_demo_contract_renewal_alerts_16
Inventory Reorder Alerts Review Date ↗	Custom-Fields/Transaction-Column/custcol_demo_credit_hold_review_53
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Column/custcol_demo_customer_credit_recheck_10
Invoice Queue Automation Review Date ↗	Custom-Fields/Transaction-Column/custcol_demo_customer_deposit_matching_37
Inventory Reorder Alerts Review Date ↗	Custom-Fields/Transaction-Column/custcol_demo_customer_duplicate_review_21
Customer Onboarding Controls Review Date ↗	Custom-Fields/Transaction-Column/custcol_demo_customer_onboarding_controls_45
Inventory Reorder Alerts Exception Flag ↗	Custom-Fields/Transaction-Column/custcol_demo_customer_tier_management_55
Invoice Queue Automation Owner ↗	Custom-Fields/Transaction-Column/custcol_demo_demo_core_utilities_42
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Transaction-Column/custcol_demo_drop_ship_coordination_08
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Transaction-Column/custcol_demo_expense_approval_routing_22
Inventory Reorder Alerts Owner ↗	Custom-Fields/Transaction-Column/custcol_demo_forecast_adjustment_review_26
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Column/custcol_demo_fulfillment_hold_automation_03
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Transaction-Column/custcol_demo_inventory_count_reconciliation_07
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Transaction-Column/custcol_demo_inventory_reorder_alerts_46
Inventory Reorder Alerts Exception Flag ↗	Custom-Fields/Transaction-Column/custcol_demo_inventory_transfer_review_39
Customer Onboarding Controls Hold Reason ↗	Custom-Fields/Transaction-Column/custcol_demo_invoice_delivery_preferences_20

DOCUMENT	SOURCE
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Transaction-Column/custcol_demo_invoice_queue_automation_44
Invoice Queue Automation Hold Reason ↗	Custom-Fields/Transaction-Column/custcol_demo_item_fulfillment_controls_52
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Column/custcol_demo_item_fulfillment_labeling_35
Order Approval Workflow Hold Reason ↗	Custom-Fields/Transaction-Column/custcol_demo_item_margin_guardrails_60
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Transaction-Column/custcol_demo_item_master_governance_15
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Transaction-Column/custcol_demo_journal_approval_controls_23
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Column/custcol_demo_order_approval_workflow_43
Inventory Reorder Alerts Status ↗	Custom-Fields/Transaction-Column/custcol_demo_order_change_audit_33
Order Approval Workflow Status ↗	Custom-Fields/Transaction-Column/custcol_demo_partner_referral_tracking_25
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Transaction-Column/custcol_demo_payment_application_review_06
Customer Onboarding Controls Review Date ↗	Custom-Fields/Transaction-Column/custcol_demo_price_level_governance_29
Invoice Queue Automation Exception Flag ↗	Custom-Fields/Transaction-Column/custcol_demo_pricing_review_process_47
Customer Onboarding Controls Status ↗	Custom-Fields/Transaction-Column/custcol_demo_project_billing_review_01
Inventory Reorder Alerts Approval Level ↗	Custom-Fields/Transaction-Column/custcol_demo_project_task_assignment_40
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Column/custcol_demo_purchase_order_closeout_34
Customer Onboarding Controls Status ↗	Custom-Fields/Transaction-Column/custcol_demo_purchase_price_variance_review_09
Inventory Reorder Alerts Priority ↗	Custom-Fields/Transaction-Column/custcol_demo_purchase_request_approval_51
Inventory Reorder Alerts Status ↗	Custom-Fields/Transaction-Column/custcol_demo_quote_approval_matrix_17
Invoice Queue Automation Status ↗	Custom-Fields/Transaction-Column/custcol_demo_quote_expiration_monitoring_57

DOCUMENT	SOURCE
Order Approval Workflow Hold Reason ↗	Custom-Fields/Transaction-Column/custcol_demo_renewal_opportunity_routing_04
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Transaction-Column/custcol_demo_return_authorization_processing_54
Customer Onboarding Controls Hold Reason ↗	Custom-Fields/Transaction-Column/custcol_demo_revenue_recognition_review_12
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Column/custcol_demo_sales_order_risk_review_50
Order Approval Workflow Priority ↗	Custom-Fields/Transaction-Column/custcol_demo_sales_rep_assignment_rules_11
Customer Onboarding Controls Exception Flag ↗	Custom-Fields/Transaction-Column/custcol_demo_sales_tax_exception_review_31
Order Approval Workflow Hold Reason ↗	Custom-Fields/Transaction-Column/custcol_demo_serialized_item_compliance_36
Invoice Queue Automation Owner ↗	Custom-Fields/Transaction-Column/custcol_demo_service_case_sla_tracking_18
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Column/custcol_demo_shipping_exception_alerts_59
Customer Onboarding Controls Routing Group ↗	Custom-Fields/Transaction-Column/custcol_demo_shipping_method_validation_30
Inventory Reorder Alerts Status ↗	Custom-Fields/Transaction-Column/custcol_demo_support_case_routing_49
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Column/custcol_demo_support_intake_triage_32
Customer Onboarding Controls Owner ↗	Custom-Fields/Transaction-Column/custcol_demo_tax_code_review_02
Order Approval Workflow Approval Level ↗	Custom-Fields/Transaction-Column/custcol_demo_vendor_bill_exception_review_56
Customer Onboarding Controls Approval Level ↗	Custom-Fields/Transaction-Column/custcol_demo_vendor_compliance_checks_48
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Transaction-Column/custcol_demo_vendor_onboarding_review_14
Inventory Reorder Alerts Routing Group ↗	Custom-Fields/Transaction-Column/custcol_demo_vendor_payment_release_38
Customer Onboarding Controls Priority ↗	Custom-Fields/Transaction-Column/custcol_demo_warehouse_transfer_controls_19

Inventory Reorder Alerts Owner

Source: `Custom-Fields/CRM/custevent_demo_billing_schedule_monitor_10`

Inventory Reorder Alerts Owner stores the billing schedule monitor value used on Cash Sale records.

Purpose

Use this field to track the billing schedule monitor status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the billing schedule monitor process.
- **cash-sale** ↗ - connected through the billing schedule monitor process.

Invoice Queue Automation Routing Group

Source: `Custom-Fields/CRM/custevent_demo_campaign_response_routing_06`

Invoice Queue Automation Routing Group stores the campaign response routing value used on Employee records.

Purpose

Use this field to track the campaign response routing status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Routing Group	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the campaign response routing process.
- **employee** ↗ - connected through the campaign response routing process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/CRM/custevent_demo_cash_sale_exception_review_09`

Inventory Reorder Alerts Status stores the cash sale exception review value used on Calendar Event records.

Purpose

Use this field to track the cash sale exception review status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the cash sale exception review process.
- **calendar-event** ↗ - connected through the cash sale exception review process.

Inventory Reorder Alerts Priority

Source: `Custom-Fields/CRM/custevent_demo_customer_duplicate_review_03`

Inventory Reorder Alerts Priority stores the customer duplicate review value used on Account records.

Purpose

Use this field to track the customer duplicate review status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Priority	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the customer duplicate review process.
- **account** ↗ - connected through the customer duplicate review process.

Customer Onboarding Controls Hold Reason

Source: `Custom-Fields/CRM/custevent_demo_expense_approval_routing_04`

Customer Onboarding Controls Hold Reason stores the expense approval routing value used on Sales Order records.

Purpose

Use this field to track the expense approval routing status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Hold Reason	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the expense approval routing process.
- **sales-order** ↗ - connected through the expense approval routing process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/CRM/custevent_demo_forecast_adjustment_review_08`

Customer Onboarding Controls Approval Level stores the forecast adjustment review value used on Lead records.

Purpose

Use this field to track the forecast adjustment review status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the forecast adjustment review process.
- **lead** ↗ - connected through the forecast adjustment review process.

Invoice Queue Automation Owner

Source: `Custom-Fields/CRM/custevent_demo_invoice_delivery_preferences_02`

Invoice Queue Automation Owner stores the invoice delivery preferences value used on Lot Numbered Item records.

Purpose

Use this field to track the invoice delivery preferences status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Owner	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the invoice delivery preferences process.
- **lot-numbered-item** ↗ - connected through the invoice delivery preferences process.

Customer Onboarding Controls Status

Source: `Custom-Fields/CRM/custevent_demo_item_fulfillment_labeling_17`

Customer Onboarding Controls Status stores the item fulfillment labeling value used on Account records.

Purpose

Use this field to track the item fulfillment labeling status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item fulfillment labeling process.
- **account** ↗ - connected through the item fulfillment labeling process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/CRM/custevent_demo_journal_approval_controls_05`

Inventory Reorder Alerts Review Date stores the journal approval controls value used on Inventory Item records.

Purpose

Use this field to track the journal approval controls status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the journal approval controls process.
- **inventory-item** ↗ - connected through the journal approval controls process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/CRM/custevent_demo_order_change_audit_15`

Invoice Queue Automation Exception Flag stores the order change audit value used on Non-inventory Item records.

Purpose

Use this field to track the order change audit status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the order change audit process.
- **non-inventory-item** ↗ - connected through the order change audit process.

Inventory Reorder Alerts Exception Flag

Source: `Custom-Fields/CRM/custevent_demo_partner_referral_tracking_07`

Inventory Reorder Alerts Exception Flag stores the partner referral tracking value used on Work Order records.

Purpose

Use this field to track the partner referral tracking status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Exception Flag	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the partner referral tracking process.
- **work-order** ↗ - connected through the partner referral tracking process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/CRM/custevent_demo_price_level_governance_11`

Customer Onboarding Controls Priority stores the price level governance value used on Purchase Requisition records.

Purpose

Use this field to track the price level governance status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the price level governance process.
- **purchase-requisition** ↗ - connected through the price level governance process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/CRM/custevent_demo_purchase_order_closeout_16`

Inventory Reorder Alerts Approval Level stores the purchase order closeout value used on Lot Numbered Item records.

Purpose

Use this field to track the purchase order closeout status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the purchase order closeout process.
- **lot-numbered-item** ↗ - connected through the purchase order closeout process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/CRM/custevent_demo_sales_tax_exception_review_13`

Inventory Reorder Alerts Review Date stores the sales tax exception review value used on Location records.

Purpose

Use this field to track the sales tax exception review status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the sales tax exception review process.
- **location** ↗ - connected through the sales tax exception review process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/CRM/custevent_demo_serialized_item_compliance_18`

Inventory Reorder Alerts Owner stores the serialized item compliance value used on Sales Order records.

Purpose

Use this field to track the serialized item compliance status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the serialized item compliance process.
- **sales-order** ↗ - connected through the serialized item compliance process.

Inventory Reorder Alerts Hold Reason

Source: `Custom-Fields/CRM/custevent_demo_shipping_method_validation_12`

Inventory Reorder Alerts Hold Reason stores the shipping method validation value used on Vendor Return records.

Purpose

Use this field to track the shipping method validation status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Hold Reason	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the shipping method validation process.
- **vendor-return** ↗ - connected through the shipping method validation process.

Invoice Queue Automation Routing Group

Source: `Custom-Fields/CRM/custevent_demo_support_intake_triage_14`

Invoice Queue Automation Routing Group stores the support intake triage value used on Campaign records.

Purpose

Use this field to track the support intake triage status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Routing Group	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the support intake triage process.
- **campaign** ↗ - connected through the support intake triage process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/CRM/custevent_demo_warehouse_transfer_controls_01`

Inventory Reorder Alerts Status stores the warehouse transfer controls value used on Non-inventory Item records.

Purpose

Use this field to track the warehouse transfer controls status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the warehouse transfer controls process.
- **non-inventory-item** ↗ - connected through the warehouse transfer controls process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Entity/custentity_demo_billing_schedule_monitor_29`

Customer Onboarding Controls Review Date stores the billing schedule monitor value used on Purchase Requisition records.

Purpose

Use this field to track the billing schedule monitor status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the billing schedule monitor process.
- **purchase-requisition** ↗ - connected through the billing schedule monitor process.

Invoice Queue Automation Status

Source: `Custom-Fields/Entity/custentity_demo_campaign_response_routing_25`

Invoice Queue Automation Status stores the campaign response routing value used on Work Order records.

Purpose

Use this field to track the campaign response routing status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Status	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the campaign response routing process.
- **work-order** ↗ - connected through the campaign response routing process.

Invoice Queue Automation Routing Group

Source: `Custom-Fields/Entity/custentity_demo_case_escalation_management_06`

Invoice Queue Automation Routing Group stores the case escalation management value used on Lot Numbered Item records.

Purpose

Use this field to track the case escalation management status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Routing Group	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the case escalation management process.
- **lot-numbered-item** ↗ - connected through the case escalation management process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Entity/custentity_demo_cash_sale_exception_review_28`

Invoice Queue Automation Hold Reason stores the cash sale exception review value used on Cash Sale records.

Purpose

Use this field to track the cash sale exception review status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the cash sale exception review process.
- **cash-sale** ↗ - connected through the cash sale exception review process.

Invoice Queue Automation Routing Group

Source: `Custom-Fields/Entity/custentity_demo_commission_eligibility_flags_14`

Invoice Queue Automation Routing Group stores the commission eligibility flags value used on Cash Sale records.

Purpose

Use this field to track the commission eligibility flags status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Routing Group	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the commission eligibility flags process.
- **cash-sale** ↗ - connected through the commission eligibility flags process.

Order Approval Workflow Status

Source: `Custom-Fields/Entity/custentity_demo_contract_renewal_alerts_17`

Order Approval Workflow Status stores the contract renewal alerts value used on Location records.

Purpose

Use this field to track the contract renewal alerts status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Status	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the contract renewal alerts process.
- **location** ↗ - connected through the contract renewal alerts process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Entity/custentity_demo_customer_credit_recheck_11`

Customer Onboarding Controls Priority stores the customer credit recheck value used on Work Order records.

Purpose

Use this field to track the customer credit recheck status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer credit recheck process.
- **work-order** ↗ - connected through the customer credit recheck process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Entity/custentity_demo_customer_deposit_matching_38`

Customer Onboarding Controls Routing Group stores the customer deposit matching value used on Employee records.

Purpose

Use this field to track the customer deposit matching status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer deposit matching process.
- **employee** ↗ - connected through the customer deposit matching process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Entity/custentity_demo_customer_duplicate_review_22`

Customer Onboarding Controls Routing Group stores the customer duplicate review value used on Sales Order records.

Purpose

Use this field to track the customer duplicate review status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer duplicate review process.
- **sales-order** ↗ - connected through the customer duplicate review process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Entity/custentity_demo_drop_ship_coordination_09`

Inventory Reorder Alerts Status stores the drop ship coordination value used on Inventory Item records.

Purpose

Use this field to track the drop ship coordination status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the drop ship coordination process.
- **inventory-item** ↗ - connected through the drop ship coordination process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Entity/custentity_demo_employee_approval_limits_01`

Customer Onboarding Controls Status stores the employee approval limits value used on Purchase Requisition records.

Purpose

Use this field to track the employee approval limits status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the employee approval limits process.
- **purchase-requisition** ↗ - connected through the employee approval limits process.

Inventory Reorder Alerts Exception Flag

Source: `Custom-Fields/Entity/custentity_demo_expense_approval_routing_23`

Inventory Reorder Alerts Exception Flag stores the expense approval routing value used on Inventory Item records.

Purpose

Use this field to track the expense approval routing status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Exception Flag	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the expense approval routing process.
- **inventory-item** ↗ - connected through the expense approval routing process.

Inventory Reorder Alerts Priority

Source: `Custom-Fields/Entity/custentity_demo_forecast_adjustment_review_27`

Inventory Reorder Alerts Priority stores the forecast adjustment review value used on Calendar Event records.

Purpose

Use this field to track the forecast adjustment review status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Priority	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the forecast adjustment review process.
- **calendar-event** ↗ - connected through the forecast adjustment review process.

Inventory Reorder Alerts Hold Reason

Source: `Custom-Fields/Entity/custentity_demo_fulfillment_hold_automation_04`

Inventory Reorder Alerts Hold Reason stores the fulfillment hold automation value used on Campaign records.

Purpose

Use this field to track the fulfillment hold automation status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Hold Reason	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the fulfillment hold automation process.
- **campaign** ↗ - connected through the fulfillment hold automation process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Entity/custentity_demo_inventory_count_reconciliation_08`

Customer Onboarding Controls Approval Level stores the inventory count reconciliation value used on Sales Order records.

Purpose

Use this field to track the inventory count reconciliation status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the inventory count reconciliation process.
- **sales-order** ↗ - connected through the inventory count reconciliation process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Entity/custentity_demo_inventory_transfer_review_40`

Inventory Reorder Alerts Approval Level stores the inventory transfer review value used on Lead records.

Purpose

Use this field to track the inventory transfer review status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the inventory transfer review process.
- **lead** ↗ - connected through the inventory transfer review process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Entity/custentity_demo_invoice_delivery_preferences_21`

Customer Onboarding Controls Review Date stores the invoice delivery preferences value used on Account records.

Purpose

Use this field to track the invoice delivery preferences status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the invoice delivery preferences process.
- **account** ↗ - connected through the invoice delivery preferences process.

Customer Onboarding Controls Hold Reason

Source: `Custom-Fields/Entity/custentity_demo_item_fulfillment_labeling_36`

Customer Onboarding Controls Hold Reason stores the item fulfillment labeling value used on Sales Order records.

Purpose

Use this field to track the item fulfillment labeling status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Hold Reason	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item fulfillment labeling process.
- **sales-order** ↗ - connected through the item fulfillment labeling process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Entity/custentity_demo_item_master_governance_16`

Customer Onboarding Controls Approval Level stores the item master governance value used on Vendor Return records.

Purpose

Use this field to track the item master governance status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item master governance process.
- **vendor-return** ↗ - connected through the item master governance process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Entity/custentity_demo_journal_approval_controls_24`

Inventory Reorder Alerts Approval Level stores the journal approval controls value used on Employee records.

Purpose

Use this field to track the journal approval controls status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the journal approval controls process.
- **employee** ↗ - connected through the journal approval controls process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Entity/custentity_demo_order_change_audit_34`

Customer Onboarding Controls Owner stores the order change audit value used on Lot Numbered Item records.

Purpose

Use this field to track the order change audit status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the order change audit process.
- **lot-numbered-item** ↗ - connected through the order change audit process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Entity/custentity_demo_partner_referral_tracking_26`

Inventory Reorder Alerts Owner stores the partner referral tracking value used on Lead records.

Purpose

Use this field to track the partner referral tracking status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the partner referral tracking process.
- **lead** ↗ - connected through the partner referral tracking process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Entity/custentity_demo_payment_application_review_07`

Customer Onboarding Controls Exception Flag stores the payment application review value used on Account records.

Purpose

Use this field to track the payment application review status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the payment application review process.
- **account** ↗ - connected through the payment application review process.

Order Approval Workflow Routing Group

Source: `Custom-Fields/Entity/custentity_demo_price_level_governance_30`

Order Approval Workflow Routing Group stores the price level governance value used on Vendor Return records.

Purpose

Use this field to track the price level governance status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Routing Group	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the price level governance process.
- **vendor-return** ↗ - connected through the price level governance process.

Invoice Queue Automation Owner

Source: `Custom-Fields/Entity/custentity_demo_project_billing_review_02`

Invoice Queue Automation Owner stores the project billing review value used on Vendor Return records.

Purpose

Use this field to track the project billing review status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Owner	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the project billing review process.
- **vendor-return** ↗ - connected through the project billing review process.

Inventory Reorder Alerts Priority

Source: `Custom-Fields/Entity/custentity_demo_purchase_order_closeout_35`

Inventory Reorder Alerts Priority stores the purchase order closeout value used on Account records.

Purpose

Use this field to track the purchase order closeout status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Priority	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the purchase order closeout process.
- **account** ↗ - connected through the purchase order closeout process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Entity/custentity_demo_purchase_price_variance_review_10`

Customer Onboarding Controls Owner stores the purchase price variance review value used on Employee records.

Purpose

Use this field to track the purchase price variance review status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the purchase price variance review process.
- **employee** ↗ - connected through the purchase price variance review process.

Order Approval Workflow Owner

Source: `Custom-Fields/Entity/custentity_demo_quote_approval_matrix_18`

Order Approval Workflow Owner stores the quote approval matrix value used on Campaign records.

Purpose

Use this field to track the quote approval matrix status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Owner	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the quote approval matrix process.
- **campaign** ↗ - connected through the quote approval matrix process.

Invoice Queue Automation Review Date

Source: `Custom-Fields/Entity/custentity_demo_renewal_opportunity_routing_05`

Invoice Queue Automation Review Date stores the renewal opportunity routing value used on Non-inventory Item records.

Purpose

Use this field to track the renewal opportunity routing status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Review Date	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the renewal opportunity routing process.
- **non-inventory-item** ↗ - connected through the renewal opportunity routing process.

Invoice Queue Automation Review Date

Source: `Custom-Fields/Entity/custentity_demo_revenue_recognition_review_13`

Invoice Queue Automation Review Date stores the revenue recognition review value used on Calendar Event records.

Purpose

Use this field to track the revenue recognition review status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Review Date	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the revenue recognition review process.
- **calendar-event** ↗ - connected through the revenue recognition review process.

Inventory Reorder Alerts Hold Reason

Source: `Custom-Fields/Entity/custentity_demo_sales_rep_assignment_rules_12`

Inventory Reorder Alerts Hold Reason stores the sales rep assignment rules value used on Lead records.

Purpose

Use this field to track the sales rep assignment rules status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Hold Reason	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the sales rep assignment rules process.
- **lead** ↗ - connected through the sales rep assignment rules process.

Invoice Queue Automation Approval Level

Source: `Custom-Fields/Entity/custentity_demo_sales_tax_exception_review_32`

Invoice Queue Automation Approval Level stores the sales tax exception review value used on Campaign records.

Purpose

Use this field to track the sales tax exception review status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Approval Level	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the sales tax exception review process.
- **campaign** ↗ - connected through the sales tax exception review process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/Entity/custentity_demo_serialized_item_compliance_37`

Inventory Reorder Alerts Review Date stores the serialized item compliance value used on Inventory Item records.

Purpose

Use this field to track the serialized item compliance status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the serialized item compliance process.
- **inventory-item** ↗ - connected through the serialized item compliance process.

Invoice Queue Automation Priority

Source: `Custom-Fields/Entity/custentity_demo_service_case_sla_tracking_19`

Invoice Queue Automation Priority stores the service case sla tracking value used on Non-inventory Item records.

Purpose

Use this field to track the service case sla tracking status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Priority	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the service case sla tracking process.
- **non-inventory-item** ↗ - connected through the service case sla tracking process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Entity/custentity_demo_shipping_method_validation_31`

Invoice Queue Automation Exception Flag stores the shipping method validation value used on Location records.

Purpose

Use this field to track the shipping method validation status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the shipping method validation process.
- **location** ↗ - connected through the shipping method validation process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Entity/custentity_demo_support_intake_triage_33`

Customer Onboarding Controls Status stores the support intake triage value used on Non-inventory Item records.

Purpose

Use this field to track the support intake triage status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the support intake triage process.
- **non-inventory-item** ↗ - connected through the support intake triage process.

Invoice Queue Automation Priority

Source: `Custom-Fields/Entity/custentity_demo_tax_code_review_03`

Invoice Queue Automation Priority stores the tax code review value used on Location records.

Purpose

Use this field to track the tax code review status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Priority	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the tax code review process.
- **location** ↗ - connected through the tax code review process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Entity/custentity_demo_vendor_onboarding_review_15`

Customer Onboarding Controls Exception Flag stores the vendor onboarding review value used on Purchase Requisition records.

Purpose

Use this field to track the vendor onboarding review status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor onboarding review process.
- **purchase-requisition** ↗ - connected through the vendor onboarding review process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Entity/custentity_demo_vendor_payment_release_39`

Customer Onboarding Controls Exception Flag stores the vendor payment release value used on Work Order records.

Purpose

Use this field to track the vendor payment release status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor payment release process.
- **work-order** ↗ - connected through the vendor payment release process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Entity/custentity_demo_warehouse_transfer_controls_20`

Invoice Queue Automation Hold Reason stores the warehouse transfer controls value used on Lot Numbered Item records.

Purpose

Use this field to track the warehouse transfer controls status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the warehouse transfer controls process.
- **lot-numbered-item** ↗ - connected through the warehouse transfer controls process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Item-Number/custitemnumber_demo_case_follow_up_reminder_05`

Customer Onboarding Controls Review Date stores the case follow-up reminder value used on Customer records.

Purpose

Use this field to track the case follow-up reminder status or value on Customer records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Customer

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the case follow-up reminder process.
- **customer** ↗ - connected through the case follow-up reminder process.

Invoice Queue Automation Status

Source: `Custom-Fields/Item-Number/custitemnumber_demo_customer_deposit_matching_01`

Invoice Queue Automation Status stores the customer deposit matching value used on Prospect records.

Purpose

Use this field to track the customer deposit matching status or value on Prospect records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Status	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Prospect

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the customer deposit matching process.
- **prospect** ↗ - connected through the customer deposit matching process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Item-Number/custitemnumber_demo_demo_core_utilities_06`

Inventory Reorder Alerts Routing Group stores the demo core utilities value used on Item Fulfillment records.

Purpose

Use this field to track the demo core utilities status or value on Item Fulfillment records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Item Fulfillment

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the demo core utilities process.
- **item-fulfillment** ↗ - connected through the demo core utilities process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Item-Number/custitemnumber_demo_inventory_transfer_review_03`

Customer Onboarding Controls Priority stores the inventory transfer review value used on Term records.

Purpose

Use this field to track the inventory transfer review status or value on Term records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Term

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the inventory transfer review process.
- **term** ↗ - connected through the inventory transfer review process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Item-Number/custitemnumber_demo_invoice_queue_automation_08`

Customer Onboarding Controls Approval Level stores the invoice queue automation value used on Transfer Order records.

Purpose

Use this field to track the invoice queue automation status or value on Transfer Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Transfer Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the invoice queue automation process.
- **transfer-order** ↗ - connected through the invoice queue automation process.

Inventory Reorder Alerts Exception Flag

Source: `Custom-Fields/Item-Number/custitemnumber_demo_order_approval_workflow_07`

Inventory Reorder Alerts Exception Flag stores the order approval workflow value used on Return Authorization records.

Purpose

Use this field to track the order approval workflow status or value on Return Authorization records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Exception Flag	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Return Authorization

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the order approval workflow process.
- **return-authorization** ↗ - connected through the order approval workflow process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Item-Number/custitemnumber_demo_project_task_assignment_04`

Invoice Queue Automation Hold Reason stores the project task assignment value used on Shipping Item records.

Purpose

Use this field to track the project task assignment status or value on Shipping Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Shipping Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the project task assignment process.
- **shipping-item** ↗ - connected through the project task assignment process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Item-Number/custitemnumber_demo_vendor_payment_release_02`

Customer Onboarding Controls Owner stores the vendor payment release value used on Kit Item records.

Purpose

Use this field to track the vendor payment release status or value on Kit Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Kit Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor payment release process.
- **kit-item** ↗ - connected through the vendor payment release process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Item-Option/custcol_demo_option_customer_onboarding_controls_01`

Inventory Reorder Alerts Status stores the customer onboarding controls value used on Return Authorization records.

Purpose

Use this field to track the customer onboarding controls status or value on Return Authorization records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Return Authorization

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the customer onboarding controls process.
- **return-authorization** ↗ - connected through the customer onboarding controls process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Item-Option/custcol_demo_option_inventory_reorder_alerts_02`

Customer Onboarding Controls Owner stores the inventory reorder alerts value used on Transfer Order records.

Purpose

Use this field to track the inventory reorder alerts status or value on Transfer Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Transfer Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the inventory reorder alerts process.
- **transfer-order** ↗ - connected through the inventory reorder alerts process.

Order Approval Workflow Approval Level

Source: `Custom-Fields/Item-Option/custcol_demo_option_item_fulfillment_controls_08`

Order Approval Workflow Approval Level stores the item fulfillment controls value used on Class records.

Purpose

Use this field to track the item fulfillment controls status or value on Class records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Approval Level	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Class

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the item fulfillment controls process.
- **class** ↗ - connected through the item fulfillment controls process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Item-Option/custcol_demo_option_pricing_review_process_03`

Customer Onboarding Controls Priority stores the pricing review process value used on Project records.

Purpose

Use this field to track the pricing review process status or value on Project records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Project

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the pricing review process process.
- **project** ↗ - connected through the pricing review process process.

Inventory Reorder Alerts Exception Flag

Source: `Custom-Fields/Item-Option/custcol_demo_option_purchase_request_approval_07`

Inventory Reorder Alerts Exception Flag stores the purchase request approval value used on Inventory Transfer records.

Purpose

Use this field to track the purchase request approval status or value on Inventory Transfer records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Exception Flag	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Transfer

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the purchase request approval process.
- **inventory-transfer** ↗ - connected through the purchase request approval process.

Invoice Queue Automation Routing Group

Source: `Custom-Fields/Item-Option/custcol_demo_option_sales_order_risk_review_06`

Invoice Queue Automation Routing Group stores the sales order risk review value used on Item Receipt records.

Purpose

Use this field to track the sales order risk review status or value on Item Receipt records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Routing Group	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Item Receipt

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the sales order risk review process.
- **item-receipt** ↗ - connected through the sales order risk review process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/Item-Option/custcol_demo_option_support_case_routing_05`

Inventory Reorder Alerts Review Date stores the support case routing value used on Customer Payment records.

Purpose

Use this field to track the support case routing status or value on Customer Payment records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Customer Payment

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the support case routing process.
- **customer-payment** ↗ - connected through the support case routing process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Item-Option/custcol_demo_option_vendor_compliance_checks_04`

Invoice Queue Automation Hold Reason stores the vendor compliance checks value used on Expense Report records.

Purpose

Use this field to track the vendor compliance checks status or value on Expense Report records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Expense Report

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the vendor compliance checks process.
- **expense-report** ↗ - connected through the vendor compliance checks process.

Invoice Queue Automation Priority

Source: `Custom-Fields/Item/custitem_demo_backorder_review_queue_19`

Invoice Queue Automation Priority stores the backorder review queue value used on Account records.

Purpose

Use this field to track the backorder review queue status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Priority	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the backorder review queue process.
- **account** ↗ - connected through the backorder review queue process.

Invoice Queue Automation Priority

Source: `Custom-Fields/Item/custitem_demo_case_escalation_management_27`

Invoice Queue Automation Priority stores the case escalation management value used on Purchase Requisition records.

Purpose

Use this field to track the case escalation management status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Priority	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the case escalation management process.
- **purchase-requisition** ↗ - connected through the case escalation management process.

Order Approval Workflow Owner

Source: `Custom-Fields/Item/custitem_demo_case_follow_up_reminder_02`

Order Approval Workflow Owner stores the case follow-up reminder value used on Campaign records.

Purpose

Use this field to track the case follow-up reminder status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Owner	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the case follow-up reminder process.
- **campaign** ↗ - connected through the case follow-up reminder process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Item/custitem_demo_commission_eligibility_flags_35`

Customer Onboarding Controls Priority stores the commission eligibility flags value used on Inventory Item records.

Purpose

Use this field to track the commission eligibility flags status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the commission eligibility flags process.
- **inventory-item** ↗ - connected through the commission eligibility flags process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Item/custitem_demo_contract_renewal_alerts_38`

Inventory Reorder Alerts Routing Group stores the contract renewal alerts value used on Lead records.

Purpose

Use this field to track the contract renewal alerts status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the contract renewal alerts process.
- **lead** ↗ - connected through the contract renewal alerts process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Item/custitem_demo_credit_hold_review_14`

Customer Onboarding Controls Routing Group stores the credit hold review value used on Vendor Return records.

Purpose

Use this field to track the credit hold review status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the credit hold review process.
- **vendor-return** ↗ - connected through the credit hold review process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Item/custitem_demo_customer_credit_recheck_32`

Inventory Reorder Alerts Approval Level stores the customer credit recheck value used on Lot Numbered Item records.

Purpose

Use this field to track the customer credit recheck status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the customer credit recheck process.
- **lot-numbered-item** ↗ - connected through the customer credit recheck process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Item/custitem_demo_customer_onboarding_controls_06`

Customer Onboarding Controls Routing Group stores the customer onboarding controls value used on Sales Order records.

Purpose

Use this field to track the customer onboarding controls status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer onboarding controls process.
- **sales-order** ↗ - connected through the customer onboarding controls process.

Invoice Queue Automation Approval Level

Source: `Custom-Fields/Item/custitem_demo_customer_tier_management_16`

Invoice Queue Automation Approval Level stores the customer tier management value used on Campaign records.

Purpose

Use this field to track the customer tier management status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Approval Level	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the customer tier management process.
- **campaign** ↗ - connected through the customer tier management process.

Inventory Reorder Alerts Priority

Source: `Custom-Fields/Item/custitem_demo_demo_core_utilities_03`

Inventory Reorder Alerts Priority stores the demo core utilities value used on Non-inventory Item records.

Purpose

Use this field to track the demo core utilities status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Priority	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the demo core utilities process.
- **non-inventory-item** ↗ - connected through the demo core utilities process.

Invoice Queue Automation Routing Group

Source: `Custom-Fields/Item/custitem_demo_drop_ship_coordination_30`

Invoice Queue Automation Routing Group stores the drop ship coordination value used on Campaign records.

Purpose

Use this field to track the drop ship coordination status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Routing Group	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the drop ship coordination process.
- **campaign** ↗ - connected through the drop ship coordination process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Item/custitem_demo_employee_approval_limits_22`

Customer Onboarding Controls Routing Group stores the employee approval limits value used on Employee records.

Purpose

Use this field to track the employee approval limits status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the employee approval limits process.
- **employee** ↗ - connected through the employee approval limits process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Item/custitem_demo_fulfillment_hold_automation_25`

Inventory Reorder Alerts Status stores the fulfillment hold automation value used on Calendar Event records.

Purpose

Use this field to track the fulfillment hold automation status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the fulfillment hold automation process.
- **calendar-event** ↗ - connected through the fulfillment hold automation process.

Order Approval Workflow Review Date

Source: `Custom-Fields/Item/custitem_demo_inventory_count_reconciliation_29`

Order Approval Workflow Review Date stores the inventory count reconciliation value used on Location records.

Purpose

Use this field to track the inventory count reconciliation status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Review Date	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the inventory count reconciliation process.
- **location** ↗ - connected through the inventory count reconciliation process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Item/custitem_demo_inventory_reorder_alerts_07`

Invoice Queue Automation Exception Flag stores the inventory reorder alerts value used on Inventory Item records.

Purpose

Use this field to track the inventory reorder alerts status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the inventory reorder alerts process.
- **inventory-item** ↗ - connected through the inventory reorder alerts process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Item/custitem_demo_invoice_queue_automation_05`

Customer Onboarding Controls Review Date stores the invoice queue automation value used on Account records.

Purpose

Use this field to track the invoice queue automation status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the invoice queue automation process.
- **account** ↗ - connected through the invoice queue automation process.

Invoice Queue Automation Review Date

Source: `Custom-Fields/Item/custitem_demo_item_fulfillment_controls_13`

Invoice Queue Automation Review Date stores the item fulfillment controls value used on Purchase Requisition records.

Purpose

Use this field to track the item fulfillment controls status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Review Date	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the item fulfillment controls process.
- **purchase-requisition** ↗ - connected through the item fulfillment controls process.

Invoice Queue Automation Review Date

Source: `Custom-Fields/Item/custitem_demo_item_margin_guardrails_21`

Invoice Queue Automation Review Date stores the item margin guardrails value used on Inventory Item records.

Purpose

Use this field to track the item margin guardrails status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Review Date	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the item margin guardrails process.
- **inventory-item** ↗ - connected through the item margin guardrails process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/Item/custitem_demo_item_master_governance_37`

Inventory Reorder Alerts Review Date stores the item master governance value used on Work Order records.

Purpose

Use this field to track the item master governance status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the item master governance process.
- **work-order** ↗ - connected through the item master governance process.

Order Approval Workflow Hold Reason

Source: `Custom-Fields/Item/custitem_demo_order_approval_workflow_04`

Order Approval Workflow Hold Reason stores the order approval workflow value used on Lot Numbered Item records.

Purpose

Use this field to track the order approval workflow status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Hold Reason	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the order approval workflow process.
- **lot-numbered-item** ↗ - connected through the order approval workflow process.

Customer Onboarding Controls Hold Reason

Source: `Custom-Fields/Item/custitem_demo_payment_application_review_28`

Customer Onboarding Controls Hold Reason stores the payment application review value used on Vendor Return records.

Purpose

Use this field to track the payment application review status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Hold Reason	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the payment application review process.
- **vendor-return** ↗ - connected through the payment application review process.

Invoice Queue Automation Approval Level

Source: `Custom-Fields/Item/custitem_demo_pricing_review_process_08`

Invoice Queue Automation Approval Level stores the pricing review process value used on Employee records.

Purpose

Use this field to track the pricing review process status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Approval Level	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the pricing review process process.
- **employee** ↗ - connected through the pricing review process process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Item/custitem_demo_project_billing_review_23`

Invoice Queue Automation Exception Flag stores the project billing review value used on Work Order records.

Purpose

Use this field to track the project billing review status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the project billing review process.
- **work-order** ↗ - connected through the project billing review process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Item/custitem_demo_project_task_assignment_01`

Customer Onboarding Controls Status stores the project task assignment value used on Location records.

Purpose

Use this field to track the project task assignment status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the project task assignment process.
- **location** ↗ - connected through the project task assignment process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Item/custitem_demo_purchase_price_variance_review_31`

Invoice Queue Automation Exception Flag stores the purchase price variance review value used on Non-inventory Item records.

Purpose

Use this field to track the purchase price variance review status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the purchase price variance review process.
- **non-inventory-item** ↗ - connected through the purchase price variance review process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Item/custitem_demo_purchase_request_approval_12`

Invoice Queue Automation Hold Reason stores the purchase request approval value used on Cash Sale records.

Purpose

Use this field to track the purchase request approval status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the purchase request approval process.
- **cash-sale** ↗ - connected through the purchase request approval process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Item/custitem_demo_quote_approval_matrix_39`

Invoice Queue Automation Exception Flag stores the quote approval matrix value used on Calendar Event records.

Purpose

Use this field to track the quote approval matrix status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the quote approval matrix process.
- **calendar-event** ↗ - connected through the quote approval matrix process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Item/custitem_demo_quote_expiration_monitoring_18`

Customer Onboarding Controls Owner stores the quote expiration monitoring value used on Lot Numbered Item records.

Purpose

Use this field to track the quote expiration monitoring status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the quote expiration monitoring process.
- **lot-numbered-item** ↗ - connected through the quote expiration monitoring process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Item/custitem_demo_renewal_opportunity_routing_26`

Inventory Reorder Alerts Owner stores the renewal opportunity routing value used on Cash Sale records.

Purpose

Use this field to track the renewal opportunity routing status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the renewal opportunity routing process.
- **cash-sale** ↗ - connected through the renewal opportunity routing process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Item/custitem_demo_return_authorization_processing_15`

Invoice Queue Automation Exception Flag stores the return authorization processing value used on Location records.

Purpose

Use this field to track the return authorization processing status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the return authorization processing process.
- **location** ↗ - connected through the return authorization processing process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Item/custitem_demo_revenue_recognition_review_34`

Inventory Reorder Alerts Owner stores the revenue recognition review value used on Sales Order records.

Purpose

Use this field to track the revenue recognition review status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the revenue recognition review process.
- **sales-order** ↗ - connected through the revenue recognition review process.

Order Approval Workflow Priority

Source: `Custom-Fields/Item/custitem_demo_sales_order_risk_review_11`

Order Approval Workflow Priority stores the sales order risk review value used on Calendar Event records.

Purpose

Use this field to track the sales order risk review status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Priority	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the sales order risk review process.
- **calendar-event** ↗ - connected through the sales order risk review process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Item/custitem_demo_sales_rep_assignment_rules_33`

Customer Onboarding Controls Status stores the sales rep assignment rules value used on Account records.

Purpose

Use this field to track the sales rep assignment rules status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the sales rep assignment rules process.
- **account** ↗ - connected through the sales rep assignment rules process.

Order Approval Workflow Approval Level

Source: `Custom-Fields/Item/custitem_demo_service_case_sla_tracking_40`

Order Approval Workflow Approval Level stores the service case sla tracking value used on Cash Sale records.

Purpose

Use this field to track the service case sla tracking status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Approval Level	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the service case sla tracking process.
- **cash-sale** ↗ - connected through the service case sla tracking process.

Inventory Reorder Alerts Hold Reason

Source: `Custom-Fields/Item/custitem_demo_shipping_exception_alerts_20`

Inventory Reorder Alerts Hold Reason stores the shipping exception alerts value used on Sales Order records.

Purpose

Use this field to track the shipping exception alerts status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Hold Reason	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the shipping exception alerts process.
- **sales-order** ↗ - connected through the shipping exception alerts process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Item/custitem_demo_support_case_routing_10`

Inventory Reorder Alerts Owner stores the support case routing value used on Lead records.

Purpose

Use this field to track the support case routing status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the support case routing process.
- **lead** ↗ - connected through the support case routing process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Item/custitem_demo_tax_code_review_24`

Inventory Reorder Alerts Approval Level stores the tax code review value used on Lead records.

Purpose

Use this field to track the tax code review status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the tax code review process.
- **lead** ↗ - connected through the tax code review process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Item/custitem_demo_vendor_bill_exception_review_17`

Customer Onboarding Controls Status stores the vendor bill exception review value used on Non-inventory Item records.

Purpose

Use this field to track the vendor bill exception review status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor bill exception review process.
- **non-inventory-item** ↗ - connected through the vendor bill exception review process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Item/custitem_demo_vendor_compliance_checks_09`

Inventory Reorder Alerts Status stores the vendor compliance checks value used on Work Order records.

Purpose

Use this field to track the vendor compliance checks status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the vendor compliance checks process.
- **work-order** ↗ - connected through the vendor compliance checks process.

Customer Onboarding Controls Hold Reason

Source: `Custom-Fields/Item/custitem_demo_vendor_onboarding_review_36`

Customer Onboarding Controls Hold Reason stores the vendor onboarding review value used on Employee records.

Purpose

Use this field to track the vendor onboarding review status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Hold Reason	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor onboarding review process.
- **employee** ↗ - connected through the vendor onboarding review process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Other/custrecord_demo_backorder_review_queue_06`

Customer Onboarding Controls Routing Group stores the backorder review queue value used on Shipping Item records.

Purpose

Use this field to track the backorder review queue status or value on Shipping Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Shipping Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the backorder review queue process.
- **shipping-item** ↗ - connected through the backorder review queue process.

Order Approval Workflow Status

Source: `Custom-Fields/Other/custrecord_demo_credit_hold_review_01`

Order Approval Workflow Status stores the credit hold review value used on Inventory Transfer records.

Purpose

Use this field to track the credit hold review status or value on Inventory Transfer records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Status	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Transfer

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the credit hold review process.
- **inventory-transfer** ↗ - connected through the credit hold review process.

Invoice Queue Automation Priority

Source: `Custom-Fields/Other/custrecord_demo_customer_tier_management_03`

Invoice Queue Automation Priority stores the customer tier management value used on Prospect records.

Purpose

Use this field to track the customer tier management status or value on Prospect records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Priority	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Prospect

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the customer tier management process.
- **prospect** ↗ - connected through the customer tier management process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Other/custrecord_demo_quote_expiration_monitoring_05`

Customer Onboarding Controls Review Date stores the quote expiration monitoring value used on Term records.

Purpose

Use this field to track the quote expiration monitoring status or value on Term records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Term

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the quote expiration monitoring process.
- **term** ↗ - connected through the quote expiration monitoring process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Other/custrecord_demo_return_authorization_processing_02`

Inventory Reorder Alerts Owner stores the return authorization processing value used on Class records.

Purpose

Use this field to track the return authorization processing status or value on Class records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Class

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the return authorization processing process.
- **class** ↗ - connected through the return authorization processing process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Other/custrecord_demo_shipping_exception_alerts_07`

Customer Onboarding Controls Exception Flag stores the shipping exception alerts value used on Customer records.

Purpose

Use this field to track the shipping exception alerts status or value on Customer records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Customer

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the shipping exception alerts process.
- **customer** ↗ - connected through the shipping exception alerts process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Other/custrecord_demo_vendor_bill_exception_review_04`

Invoice Queue Automation Hold Reason stores the vendor bill exception review value used on Kit Item records.

Purpose

Use this field to track the vendor bill exception review status or value on Kit Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Kit Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the vendor bill exception review process.
- **kit-item** ↗ - connected through the vendor bill exception review process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_backorder_review_queue_16`

Inventory Reorder Alerts Approval Level stores the backorder review queue value used on Inventory Item records.

Purpose

Use this field to track the backorder review queue status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the backorder review queue process.
- **inventory-item** ↗ - connected through the backorder review queue process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_backorder_review_queue_77`

Inventory Reorder Alerts Review Date stores the backorder review queue value used on Cash Sale records.

Purpose

Use this field to track the backorder review queue status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the backorder review queue process.
- **cash-sale** ↗ - connected through the backorder review queue process.

Order Approval Workflow Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_billing_schedule_monitor_47`

Order Approval Workflow Exception Flag stores the billing schedule monitor value used on Lead records.

Purpose

Use this field to track the billing schedule monitor status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Exception Flag	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the billing schedule monitor process.
- **lead** ↗ - connected through the billing schedule monitor process.

Order Approval Workflow Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_campaign_response_routing_43`

Order Approval Workflow Priority stores the campaign response routing value used on Sales Order records.

Purpose

Use this field to track the campaign response routing status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Priority	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the campaign response routing process.
- **sales-order** ↗ - connected through the campaign response routing process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_case_escalation_management_24`

Inventory Reorder Alerts Approval Level stores the case escalation management value used on Location records.

Purpose

Use this field to track the case escalation management status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the case escalation management process.
- **location** ↗ - connected through the case escalation management process.

Order Approval Workflow Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_case_follow_up_reminder_60`

Order Approval Workflow Hold Reason stores the case follow-up reminder value used on Work Order records.

Purpose

Use this field to track the case follow-up reminder status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Hold Reason	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the case follow-up reminder process.
- **work-order** ↗ - connected through the case follow-up reminder process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_cash_sale_exception_review_46`

Customer Onboarding Controls Routing Group stores the cash sale exception review value used on Work Order records.

Purpose

Use this field to track the cash sale exception review status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the cash sale exception review process.
- **work-order** ↗ - connected through the cash sale exception review process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_commission_eligibility_flags_32`

Customer Onboarding Controls Approval Level stores the commission eligibility flags value used on Work Order records.

Purpose

Use this field to track the commission eligibility flags status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the commission eligibility flags process.
- **work-order** ↗ - connected through the commission eligibility flags process.

Invoice Queue Automation Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_contract_renewal_alerts_35`

Invoice Queue Automation Priority stores the contract renewal alerts value used on Cash Sale records.

Purpose

Use this field to track the contract renewal alerts status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Priority	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the contract renewal alerts process.
- **cash-sale** ↗ - connected through the contract renewal alerts process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_credit_hold_review_11`

Customer Onboarding Controls Priority stores the credit hold review value used on Campaign records.

Purpose

Use this field to track the credit hold review status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the credit hold review process.
- **campaign** ↗ - connected through the credit hold review process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_credit_hold_review_72`

Customer Onboarding Controls Approval Level stores the credit hold review value used on Inventory Item records.

Purpose

Use this field to track the credit hold review status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the credit hold review process.
- **inventory-item** ↗ - connected through the credit hold review process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_customer_credit_recheck_29`

Customer Onboarding Controls Review Date stores the customer credit recheck value used on Sales Order records.

Purpose

Use this field to track the customer credit recheck status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer credit recheck process.
- **sales-order** ↗ - connected through the customer credit recheck process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_customer_deposit_matching_56`

Customer Onboarding Controls Approval Level stores the customer deposit matching value used on Account records.

Purpose

Use this field to track the customer deposit matching status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer deposit matching process.
- **account** ↗ - connected through the customer deposit matching process.

Invoice Queue Automation Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_customer_duplicate_review_40`

Invoice Queue Automation Approval Level stores the customer duplicate review value used on Non-inventory Item records.

Purpose

Use this field to track the customer duplicate review status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Approval Level	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the customer duplicate review process.
- **non-inventory-item** ↗ - connected through the customer duplicate review process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_customer_onboarding_controls_03`

Customer Onboarding Controls Priority stores the customer onboarding controls value used on Employee records.

Purpose

Use this field to track the customer onboarding controls status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer onboarding controls process.
- **employee** ↗ - connected through the customer onboarding controls process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_customer_onboarding_controls_64`

Customer Onboarding Controls Approval Level stores the customer onboarding controls value used on Purchase Requisition records.

Purpose

Use this field to track the customer onboarding controls status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer onboarding controls process.
- **purchase-requisition** ↗ - connected through the customer onboarding controls process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_customer_tier_management_13`

Customer Onboarding Controls Review Date stores the customer tier management value used on Lot Numbered Item records.

Purpose

Use this field to track the customer tier management status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer tier management process.
- **lot-numbered-item** ↗ - connected through the customer tier management process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_customer_tier_management_74`

Inventory Reorder Alerts Owner stores the customer tier management value used on Work Order records.

Purpose

Use this field to track the customer tier management status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the customer tier management process.
- **work-order** ↗ - connected through the customer tier management process.

Invoice Queue Automation Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_demo_core_utilities_61`

Invoice Queue Automation Review Date stores the demo core utilities value used on Lead records.

Purpose

Use this field to track the demo core utilities status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Review Date	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the demo core utilities process.
- **lead** ↗ - connected through the demo core utilities process.

Invoice Queue Automation Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_drop_ship_coordination_27`

Invoice Queue Automation Priority stores the drop ship coordination value used on Lot Numbered Item records.

Purpose

Use this field to track the drop ship coordination status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Priority	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the drop ship coordination process.
- **lot-numbered-item** ↗ - connected through the drop ship coordination process.

Inventory Reorder Alerts Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_employee_approval_limits_19`

Inventory Reorder Alerts Priority stores the employee approval limits value used on Lead records.

Purpose

Use this field to track the employee approval limits status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Priority	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the employee approval limits process.
- **lead** ↗ - connected through the employee approval limits process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_employee_approval_limits_80`

Customer Onboarding Controls Approval Level stores the employee approval limits value used on Location records.

Purpose

Use this field to track the employee approval limits status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the employee approval limits process.
- **location** ↗ - connected through the employee approval limits process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_expense_approval_routing_41`

Inventory Reorder Alerts Status stores the expense approval routing value used on Lot Numbered Item records.

Purpose

Use this field to track the expense approval routing status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the expense approval routing process.
- **lot-numbered-item** ↗ - connected through the expense approval routing process.

Invoice Queue Automation Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_forecast_adjustment_review_45`

Invoice Queue Automation Review Date stores the forecast adjustment review value used on Employee records.

Purpose

Use this field to track the forecast adjustment review status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Review Date	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the forecast adjustment review process.
- **employee** ↗ - connected through the forecast adjustment review process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_fulfillment_hold_automation_22`

Inventory Reorder Alerts Routing Group stores the fulfillment hold automation value used on Purchase Requisition records.

Purpose

Use this field to track the fulfillment hold automation status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the fulfillment hold automation process.
- **purchase-requisition** ↗ - connected through the fulfillment hold automation process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_inventory_count_reconciliation_26`

Customer Onboarding Controls Owner stores the inventory count reconciliation value used on Non-inventory Item records.

Purpose

Use this field to track the inventory count reconciliation status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the inventory count reconciliation process.
- **non-inventory-item** ↗ - connected through the inventory count reconciliation process.

Customer Onboarding Controls Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_inventory_reorder_alerts_04`

Customer Onboarding Controls Hold Reason stores the inventory reorder alerts value used on Work Order records.

Purpose

Use this field to track the inventory reorder alerts status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Hold Reason	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the inventory reorder alerts process.
- **work-order** ↗ - connected through the inventory reorder alerts process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_inventory_reorder_alerts_65`

Inventory Reorder Alerts Status stores the inventory reorder alerts value used on Vendor Return records.

Purpose

Use this field to track the inventory reorder alerts status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the inventory reorder alerts process.
- **vendor-return** ↗ - connected through the inventory reorder alerts process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_inventory_transfer_review_58`

Customer Onboarding Controls Owner stores the inventory transfer review value used on Inventory Item records.

Purpose

Use this field to track the inventory transfer review status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the inventory transfer review process.
- **inventory-item** ↗ - connected through the inventory transfer review process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_invoice_delivery_preferences_39`

Customer Onboarding Controls Exception Flag stores the invoice delivery preferences value used on Campaign records.

Purpose

Use this field to track the invoice delivery preferences status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the invoice delivery preferences process.
- **campaign** ↗ - connected through the invoice delivery preferences process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_invoice_queue_automation_02`

Customer Onboarding Controls Owner stores the invoice queue automation value used on Inventory Item records.

Purpose

Use this field to track the invoice queue automation status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the invoice queue automation process.
- **inventory-item** ↗ - connected through the invoice queue automation process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_invoice_queue_automation_63`

Customer Onboarding Controls Exception Flag stores the invoice queue automation value used on Cash Sale records.

Purpose

Use this field to track the invoice queue automation status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the invoice queue automation process.
- **cash-sale** ↗ - connected through the invoice queue automation process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_item_fulfillment_controls_10`

Customer Onboarding Controls Owner stores the item fulfillment controls value used on Location records.

Purpose

Use this field to track the item fulfillment controls status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item fulfillment controls process.
- **location** ↗ - connected through the item fulfillment controls process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_item_fulfillment_controls_71`

Customer Onboarding Controls Exception Flag stores the item fulfillment controls value used on Sales Order records.

Purpose

Use this field to track the item fulfillment controls status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item fulfillment controls process.
- **sales-order** ↗ - connected through the item fulfillment controls process.

Invoice Queue Automation Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_item_fulfillment_labeling_54`

Invoice Queue Automation Routing Group stores the item fulfillment labeling value used on Non-inventory Item records.

Purpose

Use this field to track the item fulfillment labeling status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Routing Group	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the item fulfillment labeling process.
- **non-inventory-item** ↗ - connected through the item fulfillment labeling process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_item_margin_guardrails_18`

Customer Onboarding Controls Owner stores the item margin guardrails value used on Work Order records.

Purpose

Use this field to track the item margin guardrails status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item margin guardrails process.
- **work-order** ↗ - connected through the item margin guardrails process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_item_margin_guardrails_79`

Customer Onboarding Controls Exception Flag stores the item margin guardrails value used on Vendor Return records.

Purpose

Use this field to track the item margin guardrails status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item margin guardrails process.
- **vendor-return** ↗ - connected through the item margin guardrails process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_item_master_governance_34`

Customer Onboarding Controls Owner stores the item master governance value used on Calendar Event records.

Purpose

Use this field to track the item master governance status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item master governance process.
- **calendar-event** ↗ - connected through the item master governance process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_journal_approval_controls_42`

Inventory Reorder Alerts Owner stores the journal approval controls value used on Account records.

Purpose

Use this field to track the journal approval controls status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the journal approval controls process.
- **account** ↗ - connected through the journal approval controls process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_order_approval_workflow_01`

Customer Onboarding Controls Status stores the order approval workflow value used on Sales Order records.

Purpose

Use this field to track the order approval workflow status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the order approval workflow process.
- **sales-order** ↗ - connected through the order approval workflow process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_order_approval_workflow_62`

Inventory Reorder Alerts Routing Group stores the order approval workflow value used on Calendar Event records.

Purpose

Use this field to track the order approval workflow status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the order approval workflow process.
- **calendar-event** ↗ - connected through the order approval workflow process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_order_change_audit_52`

Invoice Queue Automation Hold Reason stores the order change audit value used on Location records.

Purpose

Use this field to track the order change audit status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the order change audit process.
- **location** ↗ - connected through the order change audit process.

Customer Onboarding Controls Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_partner_referral_tracking_44`

Customer Onboarding Controls Hold Reason stores the partner referral tracking value used on Inventory Item records.

Purpose

Use this field to track the partner referral tracking status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Hold Reason	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the partner referral tracking process.
- **inventory-item** ↗ - connected through the partner referral tracking process.

Invoice Queue Automation Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_payment_application_review_25`

Invoice Queue Automation Status stores the payment application review value used on Campaign records.

Purpose

Use this field to track the payment application review status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Status	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the payment application review process.
- **campaign** ↗ - connected through the payment application review process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_price_level_governance_48`

Inventory Reorder Alerts Approval Level stores the price level governance value used on Calendar Event records.

Purpose

Use this field to track the price level governance status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the price level governance process.
- **calendar-event** ↗ - connected through the price level governance process.

Invoice Queue Automation Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_pricing_review_process_05`

Invoice Queue Automation Review Date stores the pricing review process value used on Lead records.

Purpose

Use this field to track the pricing review process status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Review Date	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the pricing review process process.
- **lead** ↗ - connected through the pricing review process process.

Invoice Queue Automation Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_pricing_review_process_66`

Invoice Queue Automation Owner stores the pricing review process value used on Location records.

Purpose

Use this field to track the pricing review process status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Owner	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the pricing review process process.
- **location** ↗ - connected through the pricing review process process.

Inventory Reorder Alerts Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_project_billing_review_20`

Inventory Reorder Alerts Hold Reason stores the project billing review value used on Calendar Event records.

Purpose

Use this field to track the project billing review status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Hold Reason	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the project billing review process.
- **calendar-event** ↗ - connected through the project billing review process.

Inventory Reorder Alerts Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_project_task_assignment_59`

Inventory Reorder Alerts Priority stores the project task assignment value used on Employee records.

Purpose

Use this field to track the project task assignment status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Priority	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the project task assignment process.
- **employee** ↗ - connected through the project task assignment process.

Order Approval Workflow Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_purchase_order_closeout_53`

Order Approval Workflow Review Date stores the purchase order closeout value used on Campaign records.

Purpose

Use this field to track the purchase order closeout status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Review Date	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the purchase order closeout process.
- **campaign** ↗ - connected through the purchase order closeout process.

Order Approval Workflow Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_purchase_price_variance_review_28`

Order Approval Workflow Hold Reason stores the purchase price variance review value used on Account records.

Purpose

Use this field to track the purchase price variance review status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Hold Reason	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the purchase price variance review process.
- **account** ↗ - connected through the purchase price variance review process.

Invoice Queue Automation Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_purchase_request_approval_09`

Invoice Queue Automation Status stores the purchase request approval value used on Vendor Return records.

Purpose

Use this field to track the purchase request approval status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Status	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the purchase request approval process.
- **vendor-return** ↗ - connected through the purchase request approval process.

Invoice Queue Automation Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_purchase_request_approval_70`

Invoice Queue Automation Routing Group stores the purchase request approval value used on Account records.

Purpose

Use this field to track the purchase request approval status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Routing Group	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the purchase request approval process.
- **account** ↗ - connected through the purchase request approval process.

Order Approval Workflow Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_quote_approval_matrix_36`

Order Approval Workflow Hold Reason stores the quote approval matrix value used on Purchase Requisition records.

Purpose

Use this field to track the quote approval matrix status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Hold Reason	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the quote approval matrix process.
- **purchase-requisition** ↗ - connected through the quote approval matrix process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_quote_expiration_monitoring_15`

Customer Onboarding Controls Exception Flag stores the quote expiration monitoring value used on Sales Order records.

Purpose

Use this field to track the quote expiration monitoring status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the quote expiration monitoring process.
- **sales-order** ↗ - connected through the quote expiration monitoring process.

Inventory Reorder Alerts Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_quote_expiration_monitoring_76`

Inventory Reorder Alerts Hold Reason stores the quote expiration monitoring value used on Calendar Event records.

Purpose

Use this field to track the quote expiration monitoring status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Hold Reason	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the quote expiration monitoring process.
- **calendar-event** ↗ - connected through the quote expiration monitoring process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_renewal_opportunity_routing_23`

Invoice Queue Automation Exception Flag stores the renewal opportunity routing value used on Vendor Return records.

Purpose

Use this field to track the renewal opportunity routing status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the renewal opportunity routing process.
- **vendor-return** ↗ - connected through the renewal opportunity routing process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_return_authorization_processing_12`

Invoice Queue Automation Hold Reason stores the return authorization processing value used on Non-inventory Item records.

Purpose

Use this field to track the return authorization processing status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the return authorization processing process.
- **non-inventory-item** ↗ - connected through the return authorization processing process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_return_authorization_processing_73`

Customer Onboarding Controls Status stores the return authorization processing value used on Employee records.

Purpose

Use this field to track the return authorization processing status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the return authorization processing process.
- **employee** ↗ - connected through the return authorization processing process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_revenue_recognition_review_31`

Customer Onboarding Controls Exception Flag stores the revenue recognition review value used on Employee records.

Purpose

Use this field to track the revenue recognition review status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the revenue recognition review process.
- **employee** ↗ - connected through the revenue recognition review process.

Order Approval Workflow Approval Level

Source: `Custom-Fields/Transaction-Body/custbody_demo_sales_order_risk_review_08`

Order Approval Workflow Approval Level stores the sales order risk review value used on Purchase Requisition records.

Purpose

Use this field to track the sales order risk review status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Approval Level	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the sales order risk review process.
- **purchase-requisition** ↗ - connected through the sales order risk review process.

Order Approval Workflow Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_sales_order_risk_review_69`

Order Approval Workflow Review Date stores the sales order risk review value used on Lot Numbered Item records.

Purpose

Use this field to track the sales order risk review status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Review Date	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the sales order risk review process.
- **lot-numbered-item** ↗ - connected through the sales order risk review process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_sales_rep_assignment_rules_30`

Customer Onboarding Controls Routing Group stores the sales rep assignment rules value used on Inventory Item records.

Purpose

Use this field to track the sales rep assignment rules status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the sales rep assignment rules process.
- **inventory-item** ↗ - connected through the sales rep assignment rules process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Transaction-Body/custbody_demo_sales_tax_exception_review_50`

Inventory Reorder Alerts Owner stores the sales tax exception review value used on Purchase Requisition records.

Purpose

Use this field to track the sales tax exception review status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the sales tax exception review process.
- **purchase-requisition** ↗ - connected through the sales tax exception review process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_serialized_item_compliance_55`

Customer Onboarding Controls Exception Flag stores the serialized item compliance value used on Lot Numbered Item records.

Purpose

Use this field to track the serialized item compliance status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the serialized item compliance process.
- **lot-numbered-item** ↗ - connected through the serialized item compliance process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_service_case_sla_tracking_37`

Customer Onboarding Controls Review Date stores the service case sla tracking value used on Vendor Return records.

Purpose

Use this field to track the service case sla tracking status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the service case sla tracking process.
- **vendor-return** ↗ - connected through the service case sla tracking process.

Invoice Queue Automation Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_shipping_exception_alerts_17`

Invoice Queue Automation Status stores the shipping exception alerts value used on Employee records.

Purpose

Use this field to track the shipping exception alerts status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Status	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the shipping exception alerts process.
- **employee** ↗ - connected through the shipping exception alerts process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_shipping_exception_alerts_78`

Inventory Reorder Alerts Routing Group stores the shipping exception alerts value used on Purchase Requisition records.

Purpose

Use this field to track the shipping exception alerts status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the shipping exception alerts process.
- **purchase-requisition** ↗ - connected through the shipping exception alerts process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_shipping_method_validation_49`

Inventory Reorder Alerts Status stores the shipping method validation value used on Cash Sale records.

Purpose

Use this field to track the shipping method validation status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the shipping method validation process.
- **cash-sale** ↗ - connected through the shipping method validation process.

Inventory Reorder Alerts Exception Flag

Source: `Custom-Fields/Transaction-Body/custbody_demo_support_case_routing_07`

Inventory Reorder Alerts Exception Flag stores the support case routing value used on Cash Sale records.

Purpose

Use this field to track the support case routing status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Exception Flag	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the support case routing process.
- **cash-sale** ↗ - connected through the support case routing process.

Inventory Reorder Alerts Hold Reason

Source: `Custom-Fields/Transaction-Body/custbody_demo_support_case_routing_68`

Inventory Reorder Alerts Hold Reason stores the support case routing value used on Non-inventory Item records.

Purpose

Use this field to track the support case routing status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Hold Reason	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the support case routing process.
- **non-inventory-item** ↗ - connected through the support case routing process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_support_intake_triage_51`

Customer Onboarding Controls Priority stores the support intake triage value used on Vendor Return records.

Purpose

Use this field to track the support intake triage status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the support intake triage process.
- **vendor-return** ↗ - connected through the support intake triage process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/Transaction-Body/custbody_demo_tax_code_review_21`

Inventory Reorder Alerts Review Date stores the tax code review value used on Cash Sale records.

Purpose

Use this field to track the tax code review status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the tax code review process.
- **cash-sale** ↗ - connected through the tax code review process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_vendor_bill_exception_review_14`

Customer Onboarding Controls Routing Group stores the vendor bill exception review value used on Account records.

Purpose

Use this field to track the vendor bill exception review status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor bill exception review process.
- **account** ↗ - connected through the vendor bill exception review process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_vendor_bill_exception_review_75`

Customer Onboarding Controls Priority stores the vendor bill exception review value used on Lead records.

Purpose

Use this field to track the vendor bill exception review status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor bill exception review process.
- **lead** ↗ - connected through the vendor bill exception review process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_vendor_compliance_checks_06`

Inventory Reorder Alerts Routing Group stores the vendor compliance checks value used on Calendar Event records.

Purpose

Use this field to track the vendor compliance checks status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the vendor compliance checks process.
- **calendar-event** ↗ - connected through the vendor compliance checks process.

Inventory Reorder Alerts Priority

Source: `Custom-Fields/Transaction-Body/custbody_demo_vendor_compliance_checks_67`

Inventory Reorder Alerts Priority stores the vendor compliance checks value used on Campaign records.

Purpose

Use this field to track the vendor compliance checks status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Priority	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the vendor compliance checks process.
- **campaign** ↗ - connected through the vendor compliance checks process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_vendor_onboarding_review_33`

Customer Onboarding Controls Status stores the vendor onboarding review value used on Lead records.

Purpose

Use this field to track the vendor onboarding review status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor onboarding review process.
- **lead** ↗ - connected through the vendor onboarding review process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Transaction-Body/custbody_demo_vendor_payment_release_57`

Inventory Reorder Alerts Status stores the vendor payment release value used on Sales Order records.

Purpose

Use this field to track the vendor payment release status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the vendor payment release process.
- **sales-order** ↗ - connected through the vendor payment release process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Transaction-Body/custbody_demo_warehouse_transfer_controls_38`

Inventory Reorder Alerts Routing Group stores the warehouse transfer controls value used on Location records.

Purpose

Use this field to track the warehouse transfer controls status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the warehouse transfer controls process.
- **location** ↗ - connected through the warehouse transfer controls process.

Invoice Queue Automation Owner

Source: `Custom-Fields/Transaction-Column/custcol_demo_backorder_review_queue_58`

Invoice Queue Automation Owner stores the backorder review queue value used on Calendar Event records.

Purpose

Use this field to track the backorder review queue status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Owner	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the backorder review queue process.
- **calendar-event** ↗ - connected through the backorder review queue process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Transaction-Column/custcol_demo_billing_schedule_monitor_28`

Invoice Queue Automation Hold Reason stores the billing schedule monitor value used on Work Order records.

Purpose

Use this field to track the billing schedule monitor status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the billing schedule monitor process.
- **work-order** ↗ - connected through the billing schedule monitor process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Column/custcol_demo_campaign_response_routing_24`

Customer Onboarding Controls Approval Level stores the campaign response routing value used on Account records.

Purpose

Use this field to track the campaign response routing status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the campaign response routing process.
- **account** ↗ - connected through the campaign response routing process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/Transaction-Column/custcol_demo_case_escalation_management_05`

Inventory Reorder Alerts Review Date stores the case escalation management value used on Vendor Return records.

Purpose

Use this field to track the case escalation management status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the case escalation management process.
- **vendor-return** ↗ - connected through the case escalation management process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Transaction-Column/custcol_demo_case_follow_up_reminder_41`

Customer Onboarding Controls Status stores the case follow-up reminder value used on Employee records.

Purpose

Use this field to track the case follow-up reminder status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the case follow-up reminder process.
- **employee** ↗ - connected through the case follow-up reminder process.

Order Approval Workflow Priority

Source: `Custom-Fields/Transaction-Column/custcol_demo_cash_sale_exception_review_27`

Order Approval Workflow Priority stores the cash sale exception review value used on Employee records.

Purpose

Use this field to track the cash sale exception review status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Priority	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the cash sale exception review process.
- **employee** ↗ - connected through the cash sale exception review process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Transaction-Column/custcol_demo_commission_eligibility_flags_13`

Customer Onboarding Controls Review Date stores the commission eligibility flags value used on Employee records.

Purpose

Use this field to track the commission eligibility flags status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the commission eligibility flags process.
- **employee** ↗ - connected through the commission eligibility flags process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Column/custcol_demo_contract_renewal_alerts_16`

Customer Onboarding Controls Approval Level stores the contract renewal alerts value used on Calendar Event records.

Purpose

Use this field to track the contract renewal alerts status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the contract renewal alerts process.
- **calendar-event** ↗ - connected through the contract renewal alerts process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/Transaction-Column/custcol_demo_credit_hold_review_53`

Inventory Reorder Alerts Review Date stores the credit hold review value used on Sales Order records.

Purpose

Use this field to track the credit hold review status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the credit hold review process.
- **sales-order** ↗ - connected through the credit hold review process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Column/custcol_demo_customer_credit_recheck_10`

Customer Onboarding Controls Owner stores the customer credit recheck value used on Account records.

Purpose

Use this field to track the customer credit recheck status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer credit recheck process.
- **account** ↗ - connected through the customer credit recheck process.

Invoice Queue Automation Review Date

Source: `Custom-Fields/Transaction-Column/custcol_demo_customer_deposit_matching_37`

Invoice Queue Automation Review Date stores the customer deposit matching value used on Lot Numbered Item records.

Purpose

Use this field to track the customer deposit matching status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Review Date	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the customer deposit matching process.
- **lot-numbered-item** ↗ - connected through the customer deposit matching process.

Inventory Reorder Alerts Review Date

Source: `Custom-Fields/Transaction-Column/custcol_demo_customer_duplicate_review_21`

Inventory Reorder Alerts Review Date stores the customer duplicate review value used on Campaign records.

Purpose

Use this field to track the customer duplicate review status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Review Date	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the customer duplicate review process.
- **campaign** ↗ - connected through the customer duplicate review process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Transaction-Column/custcol_demo_customer_onboarding_controls_45`

Customer Onboarding Controls Review Date stores the customer onboarding controls value used on Cash Sale records.

Purpose

Use this field to track the customer onboarding controls status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the customer onboarding controls process.
- **cash-sale** ↗ - connected through the customer onboarding controls process.

Inventory Reorder Alerts Exception Flag

Source: `Custom-Fields/Transaction-Column/custcol_demo_customer_tier_management_55`

Inventory Reorder Alerts Exception Flag stores the customer tier management value used on Employee records.

Purpose

Use this field to track the customer tier management status or value on Employee records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Exception Flag	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Employee

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the customer tier management process.
- **employee** ↗ - connected through the customer tier management process.

Invoice Queue Automation Owner

Source: `Custom-Fields/Transaction-Column/custcol_demo_demo_core_utilities_42`

Invoice Queue Automation Owner stores the demo core utilities value used on Work Order records.

Purpose

Use this field to track the demo core utilities status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Owner	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the demo core utilities process.
- **work-order** ↗ - connected through the demo core utilities process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Transaction-Column/custcol_demo_drop_ship_coordination_08`

Inventory Reorder Alerts Approval Level stores the drop ship coordination value used on Non-inventory Item records.

Purpose

Use this field to track the drop ship coordination status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the drop ship coordination process.
- **non-inventory-item** ↗ - connected through the drop ship coordination process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Transaction-Column/custcol_demo_expense_approval_routing_22`

Customer Onboarding Controls Routing Group stores the expense approval routing value used on Non-inventory Item records.

Purpose

Use this field to track the expense approval routing status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the expense approval routing process.
- **non-inventory-item** ↗ - connected through the expense approval routing process.

Inventory Reorder Alerts Owner

Source: `Custom-Fields/Transaction-Column/custcol_demo_forecast_adjustment_review_26`

Inventory Reorder Alerts Owner stores the forecast adjustment review value used on Inventory Item records.

Purpose

Use this field to track the forecast adjustment review status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Owner	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the forecast adjustment review process.
- **inventory-item** ↗ - connected through the forecast adjustment review process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Column/custcol_demo_fulfillment_hold_automation_03`

Customer Onboarding Controls Priority stores the fulfillment hold automation value used on Cash Sale records.

Purpose

Use this field to track the fulfillment hold automation status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the fulfillment hold automation process.
- **cash-sale** ↗ - connected through the fulfillment hold automation process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Transaction-Column/custcol_demo_inventory_count_reconciliation_07`

Invoice Queue Automation Exception Flag stores the inventory count reconciliation value used on Campaign records.

Purpose

Use this field to track the inventory count reconciliation status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the inventory count reconciliation process.
- **campaign** ↗ - connected through the inventory count reconciliation process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Transaction-Column/custcol_demo_inventory_reorder_alerts_46`

Customer Onboarding Controls Routing Group stores the inventory reorder alerts value used on Purchase Requisition records.

Purpose

Use this field to track the inventory reorder alerts status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the inventory reorder alerts process.
- **purchase-requisition** ↗ - connected through the inventory reorder alerts process.

Inventory Reorder Alerts Exception Flag

Source: `Custom-Fields/Transaction-Column/custcol_demo_inventory_transfer_review_39`

Inventory Reorder Alerts Exception Flag stores the inventory transfer review value used on Sales Order records.

Purpose

Use this field to track the inventory transfer review status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Exception Flag	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the inventory transfer review process.
- **sales-order** ↗ - connected through the inventory transfer review process.

Customer Onboarding Controls Hold Reason

Source: `Custom-Fields/Transaction-Column/custcol_demo_invoice_delivery_preferences_20`

Customer Onboarding Controls Hold Reason stores the invoice delivery preferences value used on Location records.

Purpose

Use this field to track the invoice delivery preferences status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Hold Reason	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the invoice delivery preferences process.
- **location** ↗ - connected through the invoice delivery preferences process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Transaction-Column/custcol_demo_invoice_queue_automation_44`

Invoice Queue Automation Hold Reason stores the invoice queue automation value used on Calendar Event records.

Purpose

Use this field to track the invoice queue automation status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the invoice queue automation process.
- **calendar-event** ↗ - connected through the invoice queue automation process.

Invoice Queue Automation Hold Reason

Source: `Custom-Fields/Transaction-Column/custcol_demo_item_fulfillment_controls_52`

Invoice Queue Automation Hold Reason stores the item fulfillment controls value used on Account records.

Purpose

Use this field to track the item fulfillment controls status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Hold Reason	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the item fulfillment controls process.
- **account** ↗ - connected through the item fulfillment controls process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Column/custcol_demo_item_fulfillment_labeling_35`

Customer Onboarding Controls Priority stores the item fulfillment labeling value used on Campaign records.

Purpose

Use this field to track the item fulfillment labeling status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the item fulfillment labeling process.
- **campaign** ↗ - connected through the item fulfillment labeling process.

Order Approval Workflow Hold Reason

Source: `Custom-Fields/Transaction-Column/custcol_demo_item_margin_guardrails_60`

Order Approval Workflow Hold Reason stores the item margin guardrails value used on Purchase Requisition records.

Purpose

Use this field to track the item margin guardrails status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Hold Reason	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the item margin guardrails process.
- **purchase-requisition** ↗ - connected through the item margin guardrails process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Transaction-Column/custcol_demo_item_master_governance_15`

Invoice Queue Automation Exception Flag stores the item master governance value used on Lead records.

Purpose

Use this field to track the item master governance status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the item master governance process.
- **lead** ↗ - connected through the item master governance process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Transaction-Column/custcol_demo_journal_approval_controls_23`

Invoice Queue Automation Exception Flag stores the journal approval controls value used on Lot Numbered Item records.

Purpose

Use this field to track the journal approval controls status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the journal approval controls process.
- **lot-numbered-item** ↗ - connected through the journal approval controls process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Column/custcol_demo_order_approval_workflow_43`

Customer Onboarding Controls Priority stores the order approval workflow value used on Lead records.

Purpose

Use this field to track the order approval workflow status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the order approval workflow process.
- **lead** ↗ - connected through the order approval workflow process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Transaction-Column/custcol_demo_order_change_audit_33`

Inventory Reorder Alerts Status stores the order change audit value used on Vendor Return records.

Purpose

Use this field to track the order change audit status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the order change audit process.
- **vendor-return** ↗ - connected through the order change audit process.

Order Approval Workflow Status

Source: `Custom-Fields/Transaction-Column/custcol_demo_partner_referral_tracking_25`

Order Approval Workflow Status stores the partner referral tracking value used on Sales Order records.

Purpose

Use this field to track the partner referral tracking status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Status	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the partner referral tracking process.
- **sales-order** ↗ - connected through the partner referral tracking process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Transaction-Column/custcol_demo_payment_application_review_06`

Inventory Reorder Alerts Routing Group stores the payment application review value used on Location records.

Purpose

Use this field to track the payment application review status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the payment application review process.
- **location** ↗ - connected through the payment application review process.

Customer Onboarding Controls Review Date

Source: `Custom-Fields/Transaction-Column/custcol_demo_price_level_governance_29`

Customer Onboarding Controls Review Date stores the price level governance value used on Lead records.

Purpose

Use this field to track the price level governance status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Review Date	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the price level governance process.
- **lead** ↗ - connected through the price level governance process.

Invoice Queue Automation Exception Flag

Source: `Custom-Fields/Transaction-Column/custcol_demo_pricing_review_process_47`

Invoice Queue Automation Exception Flag stores the pricing review process value used on Vendor Return records.

Purpose

Use this field to track the pricing review process status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Exception Flag	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the pricing review process process.
- **vendor-return** ↗ - connected through the pricing review process process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Transaction-Column/custcol_demo_project_billing_review_01`

Customer Onboarding Controls Status stores the project billing review value used on Lead records.

Purpose

Use this field to track the project billing review status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the project billing review process.
- **lead** ↗ - connected through the project billing review process.

Inventory Reorder Alerts Approval Level

Source: `Custom-Fields/Transaction-Column/custcol_demo_project_task_assignment_40`

Inventory Reorder Alerts Approval Level stores the project task assignment value used on Inventory Item records.

Purpose

Use this field to track the project task assignment status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Approval Level	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the project task assignment process.
- **inventory-item** ↗ - connected through the project task assignment process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Column/custcol_demo_purchase_order_closeout_34`

Customer Onboarding Controls Owner stores the purchase order closeout value used on Location records.

Purpose

Use this field to track the purchase order closeout status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the purchase order closeout process.
- **location** ↗ - connected through the purchase order closeout process.

Customer Onboarding Controls Status

Source: `Custom-Fields/Transaction-Column/custcol_demo_purchase_price_variance_review_09`

Customer Onboarding Controls Status stores the purchase price variance review value used on Lot Numbered Item records.

Purpose

Use this field to track the purchase price variance review status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Status	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the purchase price variance review process.
- **lot-numbered-item** ↗ - connected through the purchase price variance review process.

Inventory Reorder Alerts Priority

Source: `Custom-Fields/Transaction-Column/custcol_demo_purchase_request_approval_51`

Inventory Reorder Alerts Priority stores the purchase request approval value used on Lot Numbered Item records.

Purpose

Use this field to track the purchase request approval status or value on Lot Numbered Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Priority	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lot Numbered Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the purchase request approval process.
- **lot-numbered-item** ↗ - connected through the purchase request approval process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Transaction-Column/custcol_demo_quote_approval_matrix_17`

Inventory Reorder Alerts Status stores the quote approval matrix value used on Cash Sale records.

Purpose

Use this field to track the quote approval matrix status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the quote approval matrix process.
- **cash-sale** ↗ - connected through the quote approval matrix process.

Invoice Queue Automation Status

Source: `Custom-Fields/Transaction-Column/custcol_demo_quote_expiration_monitoring_57`

Invoice Queue Automation Status stores the quote expiration monitoring value used on Lead records.

Purpose

Use this field to track the quote expiration monitoring status or value on Lead records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Status	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Lead

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the quote expiration monitoring process.
- **lead** ↗ - connected through the quote expiration monitoring process.

Order Approval Workflow Hold Reason

Source: `Custom-Fields/Transaction-Column/custcol_demo_renewal_opportunity_routing_04`

Order Approval Workflow Hold Reason stores the renewal opportunity routing value used on Purchase Requisition records.

Purpose

Use this field to track the renewal opportunity routing status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Hold Reason	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the renewal opportunity routing process.
- **purchase-requisition** ↗ - connected through the renewal opportunity routing process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Transaction-Column/custcol_demo_return_authorization_processing_54`

Customer Onboarding Controls Routing Group stores the return authorization processing value used on Inventory Item records.

Purpose

Use this field to track the return authorization processing status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the return authorization processing process.
- **inventory-item** ↗ - connected through the return authorization processing process.

Customer Onboarding Controls Hold Reason

Source: `Custom-Fields/Transaction-Column/custcol_demo_revenue_recognition_review_12`

Customer Onboarding Controls Hold Reason stores the revenue recognition review value used on Inventory Item records.

Purpose

Use this field to track the revenue recognition review status or value on Inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Hold Reason	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the revenue recognition review process.
- **inventory-item** ↗ - connected through the revenue recognition review process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Column/custcol_demo_sales_order_risk_review_50`

Customer Onboarding Controls Owner stores the sales order risk review value used on Non-inventory Item records.

Purpose

Use this field to track the sales order risk review status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the sales order risk review process.
- **non-inventory-item** ↗ - connected through the sales order risk review process.

Order Approval Workflow Priority

Source: `Custom-Fields/Transaction-Column/custcol_demo_sales_rep_assignment_rules_11`

Order Approval Workflow Priority stores the sales rep assignment rules value used on Sales Order records.

Purpose

Use this field to track the sales rep assignment rules status or value on Sales Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Priority	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Sales Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the sales rep assignment rules process.
- **sales-order** ↗ - connected through the sales rep assignment rules process.

Customer Onboarding Controls Exception Flag

Source: `Custom-Fields/Transaction-Column/custcol_demo_sales_tax_exception_review_31`

Customer Onboarding Controls Exception Flag stores the sales tax exception review value used on Cash Sale records.

Purpose

Use this field to track the sales tax exception review status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Exception Flag	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the sales tax exception review process.
- **cash-sale** ↗ - connected through the sales tax exception review process.

Order Approval Workflow Hold Reason

Source: `Custom-Fields/Transaction-Column/custcol_demo_serialized_item_compliance_36`

Order Approval Workflow Hold Reason stores the serialized item compliance value used on Non-inventory Item records.

Purpose

Use this field to track the serialized item compliance status or value on Non-inventory Item records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Hold Reason	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Non-inventory Item

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the serialized item compliance process.
- **non-inventory-item** ↗ - connected through the serialized item compliance process.

Invoice Queue Automation Owner

Source: `Custom-Fields/Transaction-Column/custcol_demo_service_case_sla_tracking_18`

Invoice Queue Automation Owner stores the service case sla tracking value used on Purchase Requisition records.

Purpose

Use this field to track the service case sla tracking status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Invoice Queue Automation Owner	Stores the value used by Invoice Queue Automation	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Invoice Queue Automation** ↗ - connected through the service case sla tracking process.
- **purchase-requisition** ↗ - connected through the service case sla tracking process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Column/custcol_demo_shipping_exception_alerts_59`

Customer Onboarding Controls Priority stores the shipping exception alerts value used on Cash Sale records.

Purpose

Use this field to track the shipping exception alerts status or value on Cash Sale records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Cash Sale

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the shipping exception alerts process.
- **cash-sale** ↗ - connected through the shipping exception alerts process.

Customer Onboarding Controls Routing Group

Source: `Custom-Fields/Transaction-Column/custcol_demo_shipping_method_validation_30`

Customer Onboarding Controls Routing Group stores the shipping method validation value used on Calendar Event records.

Purpose

Use this field to track the shipping method validation status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Routing Group	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the shipping method validation process.
- **calendar-event** ↗ - connected through the shipping method validation process.

Inventory Reorder Alerts Status

Source: `Custom-Fields/Transaction-Column/custcol_demo_support_case_routing_49`

Inventory Reorder Alerts Status stores the support case routing value used on Campaign records.

Purpose

Use this field to track the support case routing status or value on Campaign records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Status	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Campaign

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the support case routing process.
- **campaign** ↗ - connected through the support case routing process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Column/custcol_demo_support_intake_triage_32`

Customer Onboarding Controls Approval Level stores the support intake triage value used on Purchase Requisition records.

Purpose

Use this field to track the support intake triage status or value on Purchase Requisition records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Purchase Requisition

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the support intake triage process.
- **purchase-requisition** ↗ - connected through the support intake triage process.

Customer Onboarding Controls Owner

Source: `Custom-Fields/Transaction-Column/custcol_demo_tax_code_review_02`

Customer Onboarding Controls Owner stores the tax code review value used on Calendar Event records.

Purpose

Use this field to track the tax code review status or value on Calendar Event records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Owner	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Calendar Event

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the tax code review process.
- **calendar-event** ↗ - connected through the tax code review process.

Order Approval Workflow Approval Level

Source: `Custom-Fields/Transaction-Column/custcol_demo_vendor_bill_exception_review_56`

Order Approval Workflow Approval Level stores the vendor bill exception review value used on Work Order records.

Purpose

Use this field to track the vendor bill exception review status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Order Approval Workflow Approval Level	Stores the value used by Order Approval Workflow	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the vendor bill exception review process.
- **work-order** ↗ - connected through the vendor bill exception review process.

Customer Onboarding Controls Approval Level

Source: `Custom-Fields/Transaction-Column/custcol_demo_vendor_compliance_checks_48`

Customer Onboarding Controls Approval Level stores the vendor compliance checks value used on Location records.

Purpose

Use this field to track the vendor compliance checks status or value on Location records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Approval Level	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Location

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the vendor compliance checks process.
- **location** ↗ - connected through the vendor compliance checks process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Transaction-Column/custcol_demo_vendor_onboarding_review_14`

Inventory Reorder Alerts Routing Group stores the vendor onboarding review value used on Work Order records.

Purpose

Use this field to track the vendor onboarding review status or value on Work Order records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Work Order

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the vendor onboarding review process.
- **work-order** ↗ - connected through the vendor onboarding review process.

Inventory Reorder Alerts Routing Group

Source: `Custom-Fields/Transaction-Column/custcol_demo_vendor_payment_release_38`

Inventory Reorder Alerts Routing Group stores the vendor payment release value used on Account records.

Purpose

Use this field to track the vendor payment release status or value on Account records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Inventory Reorder Alerts Routing Group	Stores the value used by Inventory Reorder Alerts	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Account

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Inventory Reorder Alerts** ↗ - connected through the vendor payment release process.
- **account** ↗ - connected through the vendor payment release process.

Customer Onboarding Controls Priority

Source: `Custom-Fields/Transaction-Column/custcol_demo_warehouse_transfer_controls_19`

Customer Onboarding Controls Priority stores the warehouse transfer controls value used on Vendor Return records.

Purpose

Use this field to track the warehouse transfer controls status or value on Vendor Return records. It gives admins a stable field for saved searches, forms, approvals, and automation rules.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Customer Onboarding Controls Priority	Stores the value used by Customer Onboarding Controls	User entry, workflow update, or script update

Behavior

AREA	SETTING
UI access	Available on selected forms
Search/list visibility	Available for saved searches
Store value	Yes
Record type	Vendor Return

Operational notes

- Review saved searches before changing the field label or default value.
- Check scripts and workflows linked below before changing validation rules.
- Keep the field visible on forms used by the process owner.

Related configuration

This object references:

- **Customer Onboarding Controls** ↗ - connected through the warehouse transfer controls process.
- **vendor-return** ↗ - connected through the warehouse transfer controls process.

SECTION

Saved searches

Saved searches used for reporting, lists, automation, and review workflows.

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Saved searches contents

Saved searches used for reporting, lists, automation, and review workflows.

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Support Intake Triage Review Search 19 ↗	Saved-Searches/customsearch_demo_backorder_review_queue_019
Vendor Payment Release Review Search 80 ↗	Saved-Searches/customsearch_demo_backorder_review_queue_080
Backorder Review Queue Review Search 141 ↗	Saved-Searches/customsearch_demo_backorder_review_queue_141
Backorder Review Queue Review Search 202 ↗	Saved-Searches/customsearch_demo_backorder_review_queue_202
Backorder Review Queue Review Search 263 ↗	Saved-Searches/customsearch_demo_backorder_review_queue_263
Purchase Request Approval Review Search 44 ↗	Saved-Searches/customsearch_demo_billing_schedule_monitor_044
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Credit Hold Review Review Search 114 ↗	Saved-Searches/customsearch_demo_case_escalation_management_114
Billing Schedule Monitor Review Search 175 ↗	Saved-Searches/customsearch_demo_case_escalation_management_175

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Purchase Request Approval Review Search 236 ↗	Saved-Searches/customsearch_demo_case_escalation_management_236
Case Escalation Management Review Search 297 ↗	Saved-Searches/customsearch_demo_case_escalation_management_297
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Campaign Response Routing Review Search 298 ↗	Saved-Searches/customsearch_demo_contract_renewal_alerts_298
Billing Schedule Monitor Review Search 13 ↗	Saved-Searches/customsearch_demo_credit_hold_review_013
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Cash Sale Exception Review Review Search 304 ↗	Saved-Searches/customsearch_demo_customer_duplicate_review_304
Backorder Review Queue Review Search 40 ↗	Saved-Searches/customsearch_demo_customer_onboarding_controls_040
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Billing Schedule Monitor Review Search 142 ↗	Saved-Searches/customsearch_demo_drop_ship_coordination_142
Case Escalation Management Review Search 203 ↗	Saved-Searches/customsearch_demo_drop_ship_coordination_203

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Purchase Request Approval Review Search 264 ↗	Saved-Searches/customsearch_demo_drop_ship_coordination_264
Backorder Review Queue Review Search 47 ↗	Saved-Searches/customsearch_demo_employee_approval_limits_047
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Vendor Payment Release Review Search 291 ↗	Saved-Searches/customsearch_demo_employee_approval_limits_291
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Case Escalation Management Review Search 136 ↗	Saved-Searches/customsearch_demo_fulfillment_hold_automation_136
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Contract Renewal Alerts Review Search 289 ↗	Saved-Searches/customsearch_demo_inventory_transfer_review_289
Vendor Payment Release Review Search 10 ↗	Saved-Searches/customsearch_demo_invoice_delivery_preferences_010
Vendor Payment Release Review Search 71 ↗	Saved-Searches/customsearch_demo_invoice_delivery_preferences_071
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Purchase Request Approval Review Search 28 ↗	Saved-Searches/customsearch_demo_item_fulfillment_labeling_028
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Pricing Review Process Review Search 150 ↗	Saved-Searches/customsearch_demo_item_fulfillment_labeling_150
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Support Intake Triage Review Search 272 ↗	Saved-Searches/customsearch_demo_item_fulfillment_labeling_272
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Billing Schedule Monitor Review Search 213 ↗	Saved-Searches/customsearch_demo_quote_expiration_monitoring_213
Billing Schedule Monitor Review Search 274 ↗	Saved-Searches/customsearch_demo_quote_expiration_monitoring_274
Campaign Response Routing Review Search 3 ↗	Saved-Searches/customsearch_demo_renewal_opportunity_routing_003
Case Escalation Management Review Search 64 ↗	Saved-Searches/customsearch_demo_renewal_opportunity_routing_064
Pricing Review Process Review Search 125 ↗	Saved-Searches/customsearch_demo_renewal_opportunity_routing_125
Pricing Review Process Review Search 186 ↗	Saved-Searches/customsearch_demo_renewal_opportunity_routing_186
Credit Hold Review Review Search 247 ↗	Saved-Searches/customsearch_demo_renewal_opportunity_routing_247
Vendor Payment Release Review Search 308 ↗	Saved-Searches/customsearch_demo_renewal_opportunity_routing_308
Cash Sale Exception Review Review Search 2 ↗	Saved-Searches/customsearch_demo_return_authorization_processing_002
Support Intake Triage Review Search 63 ↗	Saved-Searches/customsearch_demo_return_authorization_processing_063
Cash Sale Exception Review Review Search 124 ↗	Saved-Searches/customsearch_demo_return_authorization_processing_124
Vendor Payment Release Review Search 185 ↗	Saved-Searches/customsearch_demo_return_authorization_processing_185
Commission Eligibility Flags Review Search 246 ↗	Saved-Searches/customsearch_demo_return_authorization_processing_246
Contract Renewal Alerts Review Search 307 ↗	Saved-Searches/customsearch_demo_return_authorization_processing_307

DOCUMENT	SOURCE
Case Escalation Management Review Search 37 ↗	Saved-Searches/customsearch_demo_revenue_recognition_review_037
Purchase Request Approval Review Search 98 ↗	Saved-Searches/customsearch_demo_revenue_recognition_review_098
Campaign Response Routing Review Search 159 ↗	Saved-Searches/customsearch_demo_revenue_recognition_review_159
Cash Sale Exception Review Review Search 220 ↗	Saved-Searches/customsearch_demo_revenue_recognition_review_220
Cash Sale Exception Review Review Search 281 ↗	Saved-Searches/customsearch_demo_revenue_recognition_review_281
Backorder Review Queue Review Search 46 ↗	Saved-Searches/customsearch_demo_sales_order_risk_review_046
Billing Schedule Monitor Review Search 107 ↗	Saved-Searches/customsearch_demo_sales_order_risk_review_107
Pricing Review Process Review Search 168 ↗	Saved-Searches/customsearch_demo_sales_order_risk_review_168
Commission Eligibility Flags Review Search 229 ↗	Saved-Searches/customsearch_demo_sales_order_risk_review_229
Vendor Payment Release Review Search 290 ↗	Saved-Searches/customsearch_demo_sales_order_risk_review_290
Vendor Payment Release Review Search 48 ↗	Saved-Searches/customsearch_demo_sales_rep_assignment_rules_048
Billing Schedule Monitor Review Search 109 ↗	Saved-Searches/customsearch_demo_sales_rep_assignment_rules_109
Backorder Review Queue Review Search 170 ↗	Saved-Searches/customsearch_demo_sales_rep_assignment_rules_170
Purchase Request Approval Review Search 231 ↗	Saved-Searches/customsearch_demo_sales_rep_assignment_rules_231
Support Intake Triage Review Search 292 ↗	Saved-Searches/customsearch_demo_sales_rep_assignment_rules_292
Purchase Request Approval Review Search 11 ↗	Saved-Searches/customsearch_demo_sales_tax_exception_review_011
Purchase Request Approval Review Search 72 ↗	Saved-Searches/customsearch_demo_sales_tax_exception_review_072
Case Escalation Management Review Search 133 ↗	Saved-Searches/customsearch_demo_sales_tax_exception_review_133
Pricing Review Process Review Search 194 ↗	Saved-Searches/customsearch_demo_sales_tax_exception_review_194
Vendor Payment Release Review Search 255 ↗	Saved-Searches/customsearch_demo_sales_tax_exception_review_255

DOCUMENT	SOURCE
Purchase Request Approval Review Search 316 ↗	Saved-Searches/customsearch_demo_sales_tax_exception_review_316
Case Follow-up Reminder Review Search 17 ↗	Saved-Searches/customsearch_demo_serialized_item_compliance_017
Support Intake Triage Review Search 78 ↗	Saved-Searches/customsearch_demo_serialized_item_compliance_078
Cash Sale Exception Review Review Search 139 ↗	Saved-Searches/customsearch_demo_serialized_item_compliance_139
Commission Eligibility Flags Review Search 200 ↗	Saved-Searches/customsearch_demo_serialized_item_compliance_200
Contract Renewal Alerts Review Search 261 ↗	Saved-Searches/customsearch_demo_serialized_item_compliance_261
Case Follow-up Reminder Review Search 32 ↗	Saved-Searches/customsearch_demo_service_case_sla_tracking_032
Support Intake Triage Review Search 93 ↗	Saved-Searches/customsearch_demo_service_case_sla_tracking_093
Pricing Review Process Review Search 154 ↗	Saved-Searches/customsearch_demo_service_case_sla_tracking_154
Credit Hold Review Review Search 215 ↗	Saved-Searches/customsearch_demo_service_case_sla_tracking_215
Billing Schedule Monitor Review Search 276 ↗	Saved-Searches/customsearch_demo_service_case_sla_tracking_276
Commission Eligibility Flags Review Search 8 ↗	Saved-Searches/customsearch_demo_shipping_exception_alerts_008
Commission Eligibility Flags Review Search 69 ↗	Saved-Searches/customsearch_demo_shipping_exception_alerts_069
Billing Schedule Monitor Review Search 130 ↗	Saved-Searches/customsearch_demo_shipping_exception_alerts_130
Credit Hold Review Review Search 191 ↗	Saved-Searches/customsearch_demo_shipping_exception_alerts_191
Billing Schedule Monitor Review Search 252 ↗	Saved-Searches/customsearch_demo_shipping_exception_alerts_252
Campaign Response Routing Review Search 313 ↗	Saved-Searches/customsearch_demo_shipping_exception_alerts_313
Credit Hold Review Review Search 22 ↗	Saved-Searches/customsearch_demo_shipping_method_validation_022
Credit Hold Review Review Search 83 ↗	Saved-Searches/customsearch_demo_shipping_method_validation_083

DOCUMENT	SOURCE
Billing Schedule Monitor Review Search 144 ↗	Saved-Searches/customsearch_demo_shipping_method_validation_144
Cash Sale Exception Review Review Search 205 ↗	Saved-Searches/customsearch_demo_shipping_method_validation_205
Vendor Payment Release Review Search 266 ↗	Saved-Searches/customsearch_demo_shipping_method_validation_266
Purchase Request Approval Review Search 57 ↗	Saved-Searches/customsearch_demo_support_case_routing_057
Purchase Request Approval Review Search 118 ↗	Saved-Searches/customsearch_demo_support_case_routing_118
Case Escalation Management Review Search 179 ↗	Saved-Searches/customsearch_demo_support_case_routing_179
Commission Eligibility Flags Review Search 240 ↗	Saved-Searches/customsearch_demo_support_case_routing_240
Cash Sale Exception Review Review Search 301 ↗	Saved-Searches/customsearch_demo_support_case_routing_301
Pricing Review Process Review Search 61 ↗	Saved-Searches/customsearch_demo_support_intake_triage_061
Backorder Review Queue Review Search 122 ↗	Saved-Searches/customsearch_demo_support_intake_triage_122
Backorder Review Queue Review Search 183 ↗	Saved-Searches/customsearch_demo_support_intake_triage_183
Case Follow-up Reminder Review Search 244 ↗	Saved-Searches/customsearch_demo_support_intake_triage_244
Purchase Request Approval Review Search 305 ↗	Saved-Searches/customsearch_demo_support_intake_triage_305
Case Follow-up Reminder Review Search 25 ↗	Saved-Searches/customsearch_demo_tax_code_review_025
Case Follow-up Reminder Review Search 86 ↗	Saved-Searches/customsearch_demo_tax_code_review_086
Commission Eligibility Flags Review Search 147 ↗	Saved-Searches/customsearch_demo_tax_code_review_147
Purchase Request Approval Review Search 208 ↗	Saved-Searches/customsearch_demo_tax_code_review_208
Campaign Response Routing Review Search 269 ↗	Saved-Searches/customsearch_demo_tax_code_review_269
Backorder Review Queue Review Search 41 ↗	Saved-Searches/customsearch_demo_vendor_bill_exception_review_041
Support Intake Triage Review Search 102 ↗	Saved-Searches/customsearch_demo_vendor_bill_exception_review_102

DOCUMENT	SOURCE
Case Follow-up Reminder Review Search 163 ↗	Saved-Searches/customsearch_demo_vendor_bill_exception_review_163
Credit Hold Review Review Search 224 ↗	Saved-Searches/customsearch_demo_vendor_bill_exception_review_224
Contract Renewal Alerts Review Search 285 ↗	Saved-Searches/customsearch_demo_vendor_bill_exception_review_285
Pricing Review Process Review Search 7 ↗	Saved-Searches/customsearch_demo_vendor_compliance_checks_007
Pricing Review Process Review Search 68 ↗	Saved-Searches/customsearch_demo_vendor_compliance_checks_068
Case Escalation Management Review Search 129 ↗	Saved-Searches/customsearch_demo_vendor_compliance_checks_129
Case Escalation Management Review Search 190 ↗	Saved-Searches/customsearch_demo_vendor_compliance_checks_190
Vendor Payment Release Review Search 251 ↗	Saved-Searches/customsearch_demo_vendor_compliance_checks_251
Backorder Review Queue Review Search 312 ↗	Saved-Searches/customsearch_demo_vendor_compliance_checks_312
Credit Hold Review Review Search 15 ↗	Saved-Searches/customsearch_demo_vendor_onboarding_review_015
Contract Renewal Alerts Review Search 76 ↗	Saved-Searches/customsearch_demo_vendor_onboarding_review_076
Commission Eligibility Flags Review Search 137 ↗	Saved-Searches/customsearch_demo_vendor_onboarding_review_137
Vendor Payment Release Review Search 198 ↗	Saved-Searches/customsearch_demo_vendor_onboarding_review_198
Case Follow-up Reminder Review Search 259 ↗	Saved-Searches/customsearch_demo_vendor_onboarding_review_259
Support Intake Triage Review Search 56 ↗	Saved-Searches/customsearch_demo_vendor_payment_release_056
Campaign Response Routing Review Search 117 ↗	Saved-Searches/customsearch_demo_vendor_payment_release_117
Purchase Request Approval Review Search 178 ↗	Saved-Searches/customsearch_demo_vendor_payment_release_178
Commission Eligibility Flags Review Search 239 ↗	Saved-Searches/customsearch_demo_vendor_payment_release_239
Case Follow-up Reminder Review Search 300 ↗	Saved-Searches/customsearch_demo_vendor_payment_release_300

DOCUMENT	SOURCE
Campaign Response Routing Review Search 21 ↗	Saved-Searches/customsearch_demo_warehouse_transfer_controls_021
Campaign Response Routing Review Search 82 ↗	Saved-Searches/customsearch_demo_warehouse_transfer_controls_082
Campaign Response Routing Review Search 143 ↗	Saved-Searches/customsearch_demo_warehouse_transfer_controls_143
Support Intake Triage Review Search 204 ↗	Saved-Searches/customsearch_demo_warehouse_transfer_controls_204
Support Intake Triage Review Search 265 ↗	Saved-Searches/customsearch_demo_warehouse_transfer_controls_265

Support Intake Triage Review Search 19

Source: `Saved-Searches/customsearch_demo_backorder_review_queue_019`

Support Intake Triage Review Search 19 lists Inventory Transfer records that need review for backorder review queue.

Purpose

This saved search shows Inventory Transfer records that need attention for backorder review queue.

Criteria

CRITERION	VALUE
Record type	Inventory Transfer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the backorder review queue process.
- **inventory-transfer** ↗ - connected through the backorder review queue process.

Vendor Payment Release Review Search 80

Source: `Saved-Searches/customsearch_demo_backorder_review_queue_080`

Vendor Payment Release Review Search 80 lists Vendor records that need review for backorder review queue.

Purpose

This saved search shows Vendor records that need attention for backorder review queue.

Criteria

CRITERION	VALUE
Record type	Vendor
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the backorder review queue process.
- **vendor** ↗ - connected through the backorder review queue process.

Backorder Review Queue Review Search 141

Source: `Saved-Searches/customsearch_demo_backorder_review_queue_141`

Backorder Review Queue Review Search 141 lists Purchase Requisition records that need review for backorder review queue.

Purpose

This saved search shows Purchase Requisition records that need attention for backorder review queue.

Criteria

CRITERION	VALUE
Record type	Purchase Requisition
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the backorder review queue process.
- **purchase-requisition** ↗ - connected through the backorder review queue process.

Backorder Review Queue Review Search 202

Source: `Saved-Searches/customsearch_demo_backorder_review_queue_202`

Backorder Review Queue Review Search 202 lists Billing Schedule records that need review for backorder review queue.

Purpose

This saved search shows Billing Schedule records that need attention for backorder review queue.

Criteria

CRITERION	VALUE
Record type	Billing Schedule
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the backorder review queue process.
- **billing-schedule** ↗ - connected through the backorder review queue process.

Backorder Review Queue Review Search 263

Source: `Saved-Searches/customsearch_demo_backorder_review_queue_263`

Backorder Review Queue Review Search 263 lists Expense Report records that need review for backorder review queue.

Purpose

This saved search shows Expense Report records that need attention for backorder review queue.

Criteria

CRITERION	VALUE
Record type	Expense Report
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the backorder review queue process.
- **expense-report** ↗ - connected through the backorder review queue process.

Purchase Request Approval Review Search 44

Source: `Saved-Searches/customsearch_demo_billing_schedule_monitor_044`

Purchase Request Approval Review Search 44 lists Serialized Inventory Item records that need review for billing schedule monitor.

Purpose

This saved search shows Serialized Inventory Item records that need attention for billing schedule monitor.

Criteria

CRITERION	VALUE
Record type	Serialized Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the billing schedule monitor process.
- **serialized-inventory-item** ↗ - connected through the billing schedule monitor process.

Support Intake Triage Review Search 105

Source: `Saved-Searches/customsearch_demo_billing_schedule_monitor_105`

Support Intake Triage Review Search 105 lists Lead records that need review for billing schedule monitor.

Purpose

This saved search shows Lead records that need attention for billing schedule monitor.

Criteria

CRITERION	VALUE
Record type	Lead
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the billing schedule monitor process.
- **lead** ↗ - connected through the billing schedule monitor process.

Case Follow-up Reminder Review Search 166

Source: `Saved-Searches/customsearch_demo_billing_schedule_monitor_166`

Case Follow-up Reminder Review Search 166 lists Partner records that need review for billing schedule monitor.

Purpose

This saved search shows Partner records that need attention for billing schedule monitor.

Criteria

CRITERION	VALUE
Record type	Partner
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the billing schedule monitor process.
- **partner** ↗ - connected through the billing schedule monitor process.

Pricing Review Process Review Search 227

Source: `Saved-Searches/customsearch_demo_billing_schedule_monitor_227`

Pricing Review Process Review Search 227 lists Return Authorization records that need review for billing schedule monitor.

Purpose

This saved search shows Return Authorization records that need attention for billing schedule monitor.

Criteria

CRITERION	VALUE
Record type	Return Authorization
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the billing schedule monitor process.
- **return-authorization** ↗ - connected through the billing schedule monitor process.

Credit Hold Review Review Search 288

Source: `Saved-Searches/customsearch_demo_billing_schedule_monitor_288`

Credit Hold Review Review Search 288 lists Bin records that need review for billing schedule monitor.

Purpose

This saved search shows Bin records that need attention for billing schedule monitor.

Criteria

CRITERION	VALUE
Record type	Bin
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the billing schedule monitor process.
- **bin** ↗ - connected through the billing schedule monitor process.

Purchase Request Approval Review Search 27

Source: `Saved-Searches/customsearch_demo_campaign_response_routing_027`

Purchase Request Approval Review Search 27 lists Project records that need review for campaign response routing.

Purpose

This saved search shows Project records that need attention for campaign response routing.

Criteria

CRITERION	VALUE
Record type	Project
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the campaign response routing process.
- **project** ↗ - connected through the campaign response routing process.

Purchase Request Approval Review Search 88

Source: `Saved-Searches/customsearch_demo_campaign_response_routing_088`

Purchase Request Approval Review Search 88 lists Service Item records that need review for campaign response routing.

Purpose

This saved search shows Service Item records that need attention for campaign response routing.

Criteria

CRITERION	VALUE
Record type	Service Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the campaign response routing process.
- **service-item** ↗ - connected through the campaign response routing process.

Billing Schedule Monitor Review Search 149

Source: `Saved-Searches/customsearch_demo_campaign_response_routing_149`

Billing Schedule Monitor Review Search 149 lists Work Order records that need review for campaign response routing.

Purpose

This saved search shows Work Order records that need attention for campaign response routing.

Criteria

CRITERION	VALUE
Record type	Work Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the campaign response routing process.
- **work-order** ↗ - connected through the campaign response routing process.

Cash Sale Exception Review Review Search 210

Source: `Saved-Searches/customsearch_demo_campaign_response_routing_210`

Cash Sale Exception Review Review Search 210 lists Department records that need review for campaign response routing.

Purpose

This saved search shows Department records that need attention for campaign response routing.

Criteria

CRITERION	VALUE
Record type	Department
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the campaign response routing process.
- **department** ↗ - connected through the campaign response routing process.

Support Intake Triage Review Search 271

Source: `Saved-Searches/customsearch_demo_campaign_response_routing_271`

Support Intake Triage Review Search 271 lists Item Fulfillment records that need review for campaign response routing.

Purpose

This saved search shows Item Fulfillment records that need attention for campaign response routing.

Criteria

CRITERION	VALUE
Record type	Item Fulfillment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the campaign response routing process.
- **item-fulfillment** ↗ - connected through the campaign response routing process.

Backorder Review Queue Review Search 53

Source: `Saved-Searches/customsearch_demo_case_escalation_management_053`

Backorder Review Queue Review Search 53 lists Location records that need review for case escalation management.

Purpose

This saved search shows Location records that need attention for case escalation management.

Criteria

CRITERION	VALUE
Record type	Location
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the case escalation management process.
- **location** ↗ - connected through the case escalation management process.

Credit Hold Review Review Search 114

Source: `Saved-Searches/customsearch_demo_case_escalation_management_114`

Credit Hold Review Review Search 114 lists Invoice records that need review for case escalation management.

Purpose

This saved search shows Invoice records that need attention for case escalation management.

Criteria

CRITERION	VALUE
Record type	Invoice
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the case escalation management process.
- **invoice** ↗ - connected through the case escalation management process.

Billing Schedule Monitor Review Search 175

Source: `Saved-Searches/customsearch_demo_case_escalation_management_175`

Billing Schedule Monitor Review Search 175 lists Item Receipt records that need review for case escalation management.

Purpose

This saved search shows Item Receipt records that need attention for case escalation management.

Criteria

CRITERION	VALUE
Record type	Item Receipt
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the case escalation management process.
- **item-receipt** ↗ - connected through the case escalation management process.

Purchase Request Approval Review Search 236

Source: `Saved-Searches/customsearch_demo_case_escalation_management_236`

Purchase Request Approval Review Search 236 lists Sales Tax Item records that need review for case escalation management.

Purpose

This saved search shows Sales Tax Item records that need attention for case escalation management.

Criteria

CRITERION	VALUE
Record type	Sales Tax Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the case escalation management process.
- **sales-tax-item** ↗ - connected through the case escalation management process.

Case Escalation Management Review Search 297

Source: `Saved-Searches/customsearch_demo_case_escalation_management_297`

Case Escalation Management Review Search 297 lists Cash Sale records that need review for case escalation management.

Purpose

This saved search shows Cash Sale records that need attention for case escalation management.

Criteria

CRITERION	VALUE
Record type	Cash Sale
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the case escalation management process.
- **cash-sale** ↗ - connected through the case escalation management process.

Contract Renewal Alerts Review Search 23

Source: `Saved-Searches/customsearch_demo_case_follow_up_reminder_023`

Contract Renewal Alerts Review Search 23 lists Shipping Item records that need review for case follow-up reminder.

Purpose

This saved search shows Shipping Item records that need attention for case follow-up reminder.

Criteria

CRITERION	VALUE
Record type	Shipping Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the case follow-up reminder process.
- **shipping-item** ↗ - connected through the case follow-up reminder process.

Contract Renewal Alerts Review Search 84

Source: `Saved-Searches/customsearch_demo_case_follow_up_reminder_084`

Contract Renewal Alerts Review Search 84 lists Journal Entry records that need review for case follow-up reminder.

Purpose

This saved search shows Journal Entry records that need attention for case follow-up reminder.

Criteria

CRITERION	VALUE
Record type	Journal Entry
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the case follow-up reminder process.
- **journal-entry** ↗ - connected through the case follow-up reminder process.

Backorder Review Queue Review Search 145

Source: `Saved-Searches/customsearch_demo_case_follow_up_reminder_145`

Backorder Review Queue Review Search 145 lists Lot Numbered Item records that need review for case follow-up reminder.

Purpose

This saved search shows Lot Numbered Item records that need attention for case follow-up reminder.

Criteria

CRITERION	VALUE
Record type	Lot Numbered Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the case follow-up reminder process.
- **lot-numbered-item** ↗ - connected through the case follow-up reminder process.

Vendor Payment Release Review Search 206

Source: `Saved-Searches/customsearch_demo_case_follow_up_reminder_206`

Vendor Payment Release Review Search 206 lists Contact records that need review for case follow-up reminder.

Purpose

This saved search shows Contact records that need attention for case follow-up reminder.

Criteria

CRITERION	VALUE
Record type	Contact
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the case follow-up reminder process.
- **contact** ↗ - connected through the case follow-up reminder process.

Cash Sale Exception Review Review Search 267

Source: `Saved-Searches/customsearch_demo_case_follow_up_reminder_267`

Cash Sale Exception Review Review Search 267 lists Prospect records that need review for case follow-up reminder.

Purpose

This saved search shows Prospect records that need attention for case follow-up reminder.

Criteria

CRITERION	VALUE
Record type	Prospect
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the case follow-up reminder process.
- **prospect** ↗ - connected through the case follow-up reminder process.

Cash Sale Exception Review Review Search 55

Source: `Saved-Searches/customsearch_demo_cash_sale_exception_review_055`

Cash Sale Exception Review Review Search 55 lists Kit Item records that need review for cash sale exception review.

Purpose

This saved search shows Kit Item records that need attention for cash sale exception review.

Criteria

CRITERION	VALUE
Record type	Kit Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the cash sale exception review process.
- **kit-item** ↗ - connected through the cash sale exception review process.

Backorder Review Queue Review Search 116

Source: `Saved-Searches/customsearch_demo_cash_sale_exception_review_116`

Backorder Review Queue Review Search 116 lists Opportunity records that need review for cash sale exception review.

Purpose

This saved search shows Opportunity records that need attention for cash sale exception review.

Criteria

CRITERION	VALUE
Record type	Opportunity
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the cash sale exception review process.
- **opportunity** ↗ - connected through the cash sale exception review process.

Backorder Review Queue Review Search 177

Source: `Saved-Searches/customsearch_demo_cash_sale_exception_review_177`

Backorder Review Queue Review Search 177 lists Campaign records that need review for cash sale exception review.

Purpose

This saved search shows Campaign records that need attention for cash sale exception review.

Criteria

CRITERION	VALUE
Record type	Campaign
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the cash sale exception review process.
- **campaign** ↗ - connected through the cash sale exception review process.

Credit Hold Review Review Search 238

Source: `Saved-Searches/customsearch_demo_cash_sale_exception_review_238`

Credit Hold Review Review Search 238 lists Estimate records that need review for cash sale exception review.

Purpose

This saved search shows Estimate records that need attention for cash sale exception review.

Criteria

CRITERION	VALUE
Record type	Estimate
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the cash sale exception review process.
- **estimate** ↗ - connected through the cash sale exception review process.

Credit Hold Review Review Search 299

Source: `Saved-Searches/customsearch_demo_cash_sale_exception_review_299`

Credit Hold Review Review Search 299 lists Inventory Transfer records that need review for cash sale exception review.

Purpose

This saved search shows Inventory Transfer records that need attention for cash sale exception review.

Criteria

CRITERION	VALUE
Record type	Inventory Transfer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the cash sale exception review process.
- **inventory-transfer** ↗ - connected through the cash sale exception review process.

Support Intake Triage Review Search 26

Source: `Saved-Searches/customsearch_demo_commission_eligibility_flags_026`

Support Intake Triage Review Search 26 lists Assembly Build records that need review for commission eligibility flags.

Purpose

This saved search shows Assembly Build records that need attention for commission eligibility flags.

Criteria

CRITERION	VALUE
Record type	Assembly Build
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the commission eligibility flags process.
- **assembly-build** ↗ - connected through the commission eligibility flags process.

Cash Sale Exception Review Review Search 87

Source: `Saved-Searches/customsearch_demo_commission_eligibility_flags_087`

Cash Sale Exception Review Review Search 87 lists Class records that need review for commission eligibility flags.

Purpose

This saved search shows Class records that need attention for commission eligibility flags.

Criteria

CRITERION	VALUE
Record type	Class
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the commission eligibility flags process.
- **class** ↗ - connected through the commission eligibility flags process.

Case Follow-up Reminder Review Search 148

Source: `Saved-Searches/customsearch_demo_commission_eligibility_flags_148`

Case Follow-up Reminder Review Search 148 lists Support Case records that need review for commission eligibility flags.

Purpose

This saved search shows Support Case records that need attention for commission eligibility flags.

Criteria

CRITERION	VALUE
Record type	Support Case
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the commission eligibility flags process.
- **support-case** ↗ - connected through the commission eligibility flags process.

Case Escalation Management Review Search 209

Source: `Saved-Searches/customsearch_demo_commission_eligibility_flags_209`

Case Escalation Management Review Search 209 lists Vendor Return records that need review for commission eligibility flags.

Purpose

This saved search shows Vendor Return records that need attention for commission eligibility flags.

Criteria

CRITERION	VALUE
Record type	Vendor Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the commission eligibility flags process.
- **vendor-return** ↗ - connected through the commission eligibility flags process.

Purchase Request Approval Review Search 270

Source: `Saved-Searches/customsearch_demo_commission_eligibility_flags_270`

Purchase Request Approval Review Search 270 lists Purchase Order records that need review for commission eligibility flags.

Purpose

This saved search shows Purchase Order records that need attention for commission eligibility flags.

Criteria

CRITERION	VALUE
Record type	Purchase Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the commission eligibility flags process.
- **purchase-order** ↗ - connected through the commission eligibility flags process.

Contract Renewal Alerts Review Search 54

Source: `Saved-Searches/customsearch_demo_contract_renewal_alerts_054`

Contract Renewal Alerts Review Search 54 lists Partner records that need review for contract renewal alerts.

Purpose

This saved search shows Partner records that need attention for contract renewal alerts.

Criteria

CRITERION	VALUE
Record type	Partner
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the contract renewal alerts process.
- **partner** ↗ - connected through the contract renewal alerts process.

Support Intake Triage Review Search 115

Source: `Saved-Searches/customsearch_demo_contract_renewal_alerts_115`

Support Intake Triage Review Search 115 lists Return Authorization records that need review for contract renewal alerts.

Purpose

This saved search shows Return Authorization records that need attention for contract renewal alerts.

Criteria

CRITERION	VALUE
Record type	Return Authorization
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the contract renewal alerts process.
- **return-authorization** ↗ - connected through the contract renewal alerts process.

Vendor Payment Release Review Search 176

Source: `Saved-Searches/customsearch_demo_contract_renewal_alerts_176`

Vendor Payment Release Review Search 176 lists Bin records that need review for contract renewal alerts.

Purpose

This saved search shows Bin records that need attention for contract renewal alerts.

Criteria

CRITERION	VALUE
Record type	Bin
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the contract renewal alerts process.
- **bin** ↗ - connected through the contract renewal alerts process.

Billing Schedule Monitor Review Search 237

Source: `Saved-Searches/customsearch_demo_contract_renewal_alerts_237`

Billing Schedule Monitor Review Search 237 lists Inventory Item records that need review for contract renewal alerts.

Purpose

This saved search shows Inventory Item records that need attention for contract renewal alerts.

Criteria

CRITERION	VALUE
Record type	Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the contract renewal alerts process.
- **inventory-item** ↗ - connected through the contract renewal alerts process.

Campaign Response Routing Review Search 298

Source: `Saved-Searches/customsearch_demo_contract_renewal_alerts_298`

Campaign Response Routing Review Search 298 lists Customer Deposit records that need review for contract renewal alerts.

Purpose

This saved search shows Customer Deposit records that need attention for contract renewal alerts.

Criteria

CRITERION	VALUE
Record type	Customer Deposit
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the contract renewal alerts process.
- **customer-deposit** ↗ - connected through the contract renewal alerts process.

Billing Schedule Monitor Review Search 13

Source: `Saved-Searches/customsearch_demo_credit_hold_review_013`

Billing Schedule Monitor Review Search 13 lists Inventory Item records that need review for credit hold review.

Purpose

This saved search shows Inventory Item records that need attention for credit hold review.

Criteria

CRITERION	VALUE
Record type	Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the credit hold review process.
- **inventory-item** ↗ - connected through the credit hold review process.

Commission Eligibility Flags Review Search 74

Source: `Saved-Searches/customsearch_demo_credit_hold_review_074`

Commission Eligibility Flags Review Search 74 lists Customer Deposit records that need review for credit hold review.

Purpose

This saved search shows Customer Deposit records that need attention for credit hold review.

Criteria

CRITERION	VALUE
Record type	Customer Deposit
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the credit hold review process.
- **customer-deposit** ↗ - connected through the credit hold review process.

Credit Hold Review Review Search 135

Source: `Saved-Searches/customsearch_demo_credit_hold_review_135`

Credit Hold Review Review Search 135 lists Shipping Item records that need review for credit hold review.

Purpose

This saved search shows Shipping Item records that need attention for credit hold review.

Criteria

CRITERION	VALUE
Record type	Shipping Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the credit hold review process.
- **shipping-item** ↗ - connected through the credit hold review process.

Billing Schedule Monitor Review Search 196

Source: `Saved-Searches/customsearch_demo_credit_hold_review_196`

Billing Schedule Monitor Review Search 196 lists Journal Entry records that need review for credit hold review.

Purpose

This saved search shows Journal Entry records that need attention for credit hold review.

Criteria

CRITERION	VALUE
Record type	Journal Entry
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the credit hold review process.
- **journal-entry** ↗ - connected through the credit hold review process.

Vendor Payment Release Review Search 257

Source: `Saved-Searches/customsearch_demo_credit_hold_review_257`

Vendor Payment Release Review Search 257 lists Lot Numbered Item records that need review for credit hold review.

Purpose

This saved search shows Lot Numbered Item records that need attention for credit hold review.

Criteria

CRITERION	VALUE
Record type	Lot Numbered Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the credit hold review process.
- **lot-numbered-item** ↗ - connected through the credit hold review process.

Case Escalation Management Review Search 59

Source: `Saved-Searches/customsearch_demo_customer_credit_recheck_059`

Case Escalation Management Review Search 59 lists Return Authorization records that need review for customer credit recheck.

Purpose

This saved search shows Return Authorization records that need attention for customer credit recheck.

Criteria

CRITERION	VALUE
Record type	Return Authorization
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the customer credit recheck process.
- **return-authorization** ↗ - connected through the customer credit recheck process.

Support Intake Triage Review Search 120

Source: `Saved-Searches/customsearch_demo_customer_credit_recheck_120`

Support Intake Triage Review Search 120 lists Bin records that need review for customer credit recheck.

Purpose

This saved search shows Bin records that need attention for customer credit recheck.

Criteria

CRITERION	VALUE
Record type	Bin
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the customer credit recheck process.
- **bin** ↗ - connected through the customer credit recheck process.

Case Follow-up Reminder Review Search 181

Source: `Saved-Searches/customsearch_demo_customer_credit_recheck_181`

Case Follow-up Reminder Review Search 181 lists Inventory Item records that need review for customer credit recheck.

Purpose

This saved search shows Inventory Item records that need attention for customer credit recheck.

Criteria

CRITERION	VALUE
Record type	Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the customer credit recheck process.
- **inventory-item** ↗ - connected through the customer credit recheck process.

Pricing Review Process Review Search 242

Source: `Saved-Searches/customsearch_demo_customer_credit_recheck_242`

Pricing Review Process Review Search 242 lists Customer Deposit records that need review for customer credit recheck.

Purpose

This saved search shows Customer Deposit records that need attention for customer credit recheck.

Criteria

CRITERION	VALUE
Record type	Customer Deposit
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the customer credit recheck process.
- **customer-deposit** ↗ - connected through the customer credit recheck process.

Campaign Response Routing Review Search 303

Source: `Saved-Searches/customsearch_demo_customer_credit_recheck_303`

Campaign Response Routing Review Search 303 lists Shipping Item records that need review for customer credit recheck.

Purpose

This saved search shows Shipping Item records that need attention for customer credit recheck.

Criteria

CRITERION	VALUE
Record type	Shipping Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the customer credit recheck process.
- **shipping-item** ↗ - connected through the customer credit recheck process.

Cash Sale Exception Review Review Search 6

Source: `Saved-Searches/customsearch_demo_customer_deposit_matching_006`

Cash Sale Exception Review Review Search 6 lists Credit Memo records that need review for customer deposit matching.

Purpose

This saved search shows Credit Memo records that need attention for customer deposit matching.

Criteria

CRITERION	VALUE
Record type	Credit Memo
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the customer deposit matching process.
- **credit-memo** ↗ - connected through the customer deposit matching process.

Support Intake Triage Review Search 67

Source: `Saved-Searches/customsearch_demo_customer_deposit_matching_067`

Support Intake Triage Review Search 67 lists Term records that need review for customer deposit matching.

Purpose

This saved search shows Term records that need attention for customer deposit matching.

Criteria

CRITERION	VALUE
Record type	Term
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the customer deposit matching process.
- **term** ↗ - connected through the customer deposit matching process.

Case Follow-up Reminder Review Search 128

Source: `Saved-Searches/customsearch_demo_customer_deposit_matching_128`

Case Follow-up Reminder Review Search 128 lists Task records that need review for customer deposit matching.

Purpose

This saved search shows Task records that need attention for customer deposit matching.

Criteria

CRITERION	VALUE
Record type	Task
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the customer deposit matching process.
- **task** ↗ - connected through the customer deposit matching process.

Support Intake Triage Review Search 189

Source: `Saved-Searches/customsearch_demo_customer_deposit_matching_189`

Support Intake Triage Review Search 189 lists Non-inventory Item records that need review for customer deposit matching.

Purpose

This saved search shows Non-inventory Item records that need attention for customer deposit matching.

Criteria

CRITERION	VALUE
Record type	Non-inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the customer deposit matching process.
- **non-inventory-item** ↗ - connected through the customer deposit matching process.

Billing Schedule Monitor Review Search 250

Source: `Saved-Searches/customsearch_demo_customer_deposit_matching_250`

Billing Schedule Monitor Review Search 250 lists Assembly Build records that need review for customer deposit matching.

Purpose

This saved search shows Assembly Build records that need attention for customer deposit matching.

Criteria

CRITERION	VALUE
Record type	Assembly Build
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the customer deposit matching process.
- **assembly-build** ↗ - connected through the customer deposit matching process.

Backorder Review Queue Review Search 311

Source: `Saved-Searches/customsearch_demo_customer_deposit_matching_311`

Backorder Review Queue Review Search 311 lists Class records that need review for customer deposit matching.

Purpose

This saved search shows Class records that need attention for customer deposit matching.

Criteria

CRITERION	VALUE
Record type	Class
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the customer deposit matching process.
- **class** ↗ - connected through the customer deposit matching process.

Pricing Review Process Review Search 60

Source: `Saved-Searches/customsearch_demo_customer_duplicate_review_060`

Pricing Review Process Review Search 60 lists Opportunity records that need review for customer duplicate review.

Purpose

This saved search shows Opportunity records that need attention for customer duplicate review.

Criteria

CRITERION	VALUE
Record type	Opportunity
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the customer duplicate review process.
- **opportunity** ↗ - connected through the customer duplicate review process.

Billing Schedule Monitor Review Search 121

Source: `Saved-Searches/customsearch_demo_customer_duplicate_review_121`

Billing Schedule Monitor Review Search 121 lists Campaign records that need review for customer duplicate review.

Purpose

This saved search shows Campaign records that need attention for customer duplicate review.

Criteria

CRITERION	VALUE
Record type	Campaign
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the customer duplicate review process.
- **campaign** ↗ - connected through the customer duplicate review process.

Pricing Review Process Review Search 182

Source: `Saved-Searches/customsearch_demo_customer_duplicate_review_182`

Pricing Review Process Review Search 182 lists Estimate records that need review for customer duplicate review.

Purpose

This saved search shows Estimate records that need attention for customer duplicate review.

Criteria

CRITERION	VALUE
Record type	Estimate
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the customer duplicate review process.
- **estimate** ↗ - connected through the customer duplicate review process.

Contract Renewal Alerts Review Search 243

Source: `Saved-Searches/customsearch_demo_customer_duplicate_review_243`

Contract Renewal Alerts Review Search 243 lists Inventory Transfer records that need review for customer duplicate review.

Purpose

This saved search shows Inventory Transfer records that need attention for customer duplicate review.

Criteria

CRITERION	VALUE
Record type	Inventory Transfer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the customer duplicate review process.
- **inventory-transfer** ↗ - connected through the customer duplicate review process.

Cash Sale Exception Review Review Search 304

Source: `Saved-Searches/customsearch_demo_customer_duplicate_review_304`

Cash Sale Exception Review Review Search 304 lists Vendor records that need review for customer duplicate review.

Purpose

This saved search shows Vendor records that need attention for customer duplicate review.

Criteria

CRITERION	VALUE
Record type	Vendor
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the customer duplicate review process.
- **vendor** ↗ - connected through the customer duplicate review process.

Backorder Review Queue Review Search 40

Source: `Saved-Searches/customsearch_demo_customer_onboarding_controls_040`

Backorder Review Queue Review Search 40 lists Vendor Payment records that need review for customer onboarding controls.

Purpose

This saved search shows Vendor Payment records that need attention for customer onboarding controls.

Criteria

CRITERION	VALUE
Record type	Vendor Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the customer onboarding controls process.
- **vendor-payment** ↗ - connected through the customer onboarding controls process.

Vendor Payment Release Review Search 101

Source: `Saved-Searches/customsearch_demo_customer_onboarding_controls_101`

Vendor Payment Release Review Search 101 lists Account records that need review for customer onboarding controls.

Purpose

This saved search shows Account records that need attention for customer onboarding controls.

Criteria

CRITERION	VALUE
Record type	Account
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the customer onboarding controls process.
- **account** ↗ - connected through the customer onboarding controls process.

Vendor Payment Release Review Search 162

Source: `Saved-Searches/customsearch_demo_customer_onboarding_controls_162`

Vendor Payment Release Review Search 162 lists Phone Call records that need review for customer onboarding controls.

Purpose

This saved search shows Phone Call records that need attention for customer onboarding controls.

Criteria

CRITERION	VALUE
Record type	Phone Call
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the customer onboarding controls process.
- **phone-call** ↗ - connected through the customer onboarding controls process.

Support Intake Triage Review Search 223

Source: `Saved-Searches/customsearch_demo_customer_onboarding_controls_223`

Support Intake Triage Review Search 223 lists Kit Item records that need review for customer onboarding controls.

Purpose

This saved search shows Kit Item records that need attention for customer onboarding controls.

Criteria

CRITERION	VALUE
Record type	Kit Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the customer onboarding controls process.
- **kit-item** ↗ - connected through the customer onboarding controls process.

Cash Sale Exception Review Review Search 284

Source: `Saved-Searches/customsearch_demo_customer_onboarding_controls_284`

Cash Sale Exception Review Review Search 284 lists Opportunity records that need review for customer onboarding controls.

Purpose

This saved search shows Opportunity records that need attention for customer onboarding controls.

Criteria

CRITERION	VALUE
Record type	Opportunity
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the customer onboarding controls process.
- **opportunity** ↗ - connected through the customer onboarding controls process.

Billing Schedule Monitor Review Search 52

Source: `Saved-Searches/customsearch_demo_customer_tier_management_052`

Billing Schedule Monitor Review Search 52 lists Sales Return records that need review for customer tier management.

Purpose

This saved search shows Sales Return records that need attention for customer tier management.

Criteria

CRITERION	VALUE
Record type	Sales Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the customer tier management process.
- **sales-return** ↗ - connected through the customer tier management process.

Backorder Review Queue Review Search 113

Source: `Saved-Searches/customsearch_demo_customer_tier_management_113`

Backorder Review Queue Review Search 113 lists Sales Order records that need review for customer tier management.

Purpose

This saved search shows Sales Order records that need attention for customer tier management.

Criteria

CRITERION	VALUE
Record type	Sales Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the customer tier management process.
- **sales-order** ↗ - connected through the customer tier management process.

Backorder Review Queue Review Search 174

Source: `Saved-Searches/customsearch_demo_customer_tier_management_174`

Backorder Review Queue Review Search 174 lists Credit Memo records that need review for customer tier management.

Purpose

This saved search shows Credit Memo records that need attention for customer tier management.

Criteria

CRITERION	VALUE
Record type	Credit Memo
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the customer tier management process.
- **credit-memo** ↗ - connected through the customer tier management process.

Purchase Request Approval Review Search 235

Source: `Saved-Searches/customsearch_demo_customer_tier_management_235`

Purchase Request Approval Review Search 235 lists Term records that need review for customer tier management.

Purpose

This saved search shows Term records that need attention for customer tier management.

Criteria

CRITERION	VALUE
Record type	Term
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the customer tier management process.
- **term** ↗ - connected through the customer tier management process.

Case Escalation Management Review Search 296

Source: `Saved-Searches/customsearch_demo_customer_tier_management_296`

Case Escalation Management Review Search 296 lists Task records that need review for customer tier management.

Purpose

This saved search shows Task records that need attention for customer tier management.

Criteria

CRITERION	VALUE
Record type	Task
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the customer tier management process.
- **task** ↗ - connected through the customer tier management process.

Backorder Review Queue Review Search 12

Source: `Saved-Searches/customsearch_demo_demo_core_utilities_012`

Backorder Review Queue Review Search 12 lists Sales Tax Item records that need review for demo core utilities.

Purpose

This saved search shows Sales Tax Item records that need attention for demo core utilities.

Criteria

CRITERION	VALUE
Record type	Sales Tax Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the demo core utilities process.
- **sales-tax-item** ↗ - connected through the demo core utilities process.

Commission Eligibility Flags Review Search 73

Source: `Saved-Searches/customsearch_demo_demo_core_utilities_073`

Commission Eligibility Flags Review Search 73 lists Cash Sale records that need review for demo core utilities.

Purpose

This saved search shows Cash Sale records that need attention for demo core utilities.

Criteria

CRITERION	VALUE
Record type	Cash Sale
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the demo core utilities process.
- **cash-sale** ↗ - connected through the demo core utilities process.

Commission Eligibility Flags Review Search 134

Source: `Saved-Searches/customsearch_demo_demo_core_utilities_134`

Commission Eligibility Flags Review Search 134 lists Payment Method records that need review for demo core utilities.

Purpose

This saved search shows Payment Method records that need attention for demo core utilities.

Criteria

CRITERION	VALUE
Record type	Payment Method
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the demo core utilities process.
- **payment-method** ↗ - connected through the demo core utilities process.

Backorder Review Queue Review Search 195

Source: `Saved-Searches/customsearch_demo_demo_core_utilities_195`

Backorder Review Queue Review Search 195 lists Project records that need review for demo core utilities.

Purpose

This saved search shows Project records that need attention for demo core utilities.

Criteria

CRITERION	VALUE
Record type	Project
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the demo core utilities process.
- **project** ↗ - connected through the demo core utilities process.

Support Intake Triage Review Search 256

Source: `Saved-Searches/customsearch_demo_demo_core_utilities_256`

Support Intake Triage Review Search 256 lists Service Item records that need review for demo core utilities.

Purpose

This saved search shows Service Item records that need attention for demo core utilities.

Criteria

CRITERION	VALUE
Record type	Service Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the demo core utilities process.
- **service-item** ↗ - connected through the demo core utilities process.

Vendor Payment Release Review Search 317

Source: `Saved-Searches/customsearch_demo_demo_core_utilities_317`

Vendor Payment Release Review Search 317 lists Work Order records that need review for demo core utilities.

Purpose

This saved search shows Work Order records that need attention for demo core utilities.

Criteria

CRITERION	VALUE
Record type	Work Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the demo core utilities process.
- **work-order** ↗ - connected through the demo core utilities process.

Contract Renewal Alerts Review Search 20

Source: `Saved-Searches/customsearch_demo_drop_ship_coordination_020`

Contract Renewal Alerts Review Search 20 lists Price Level records that need review for drop ship coordination.

Purpose

This saved search shows Price Level records that need attention for drop ship coordination.

Criteria

CRITERION	VALUE
Record type	Price Level
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the drop ship coordination process.
- **price-level** ↗ - connected through the drop ship coordination process.

Backorder Review Queue Review Search 81

Source: `Saved-Searches/customsearch_demo_drop_ship_coordination_081`

Backorder Review Queue Review Search 81 lists Employee records that need review for drop ship coordination.

Purpose

This saved search shows Employee records that need attention for drop ship coordination.

Criteria

CRITERION	VALUE
Record type	Employee
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the drop ship coordination process.
- **employee** ↗ - connected through the drop ship coordination process.

Billing Schedule Monitor Review Search 142

Source: `Saved-Searches/customsearch_demo_drop_ship_coordination_142`

Billing Schedule Monitor Review Search 142 lists Inventory Adjustment records that need review for drop ship coordination.

Purpose

This saved search shows Inventory Adjustment records that need attention for drop ship coordination.

Criteria

CRITERION	VALUE
Record type	Inventory Adjustment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the drop ship coordination process.
- **inventory-adjustment** ↗ - connected through the drop ship coordination process.

Case Escalation Management Review Search 203

Source: `Saved-Searches/customsearch_demo_drop_ship_coordination_203`

Case Escalation Management Review Search 203 lists Customer records that need review for drop ship coordination.

Purpose

This saved search shows Customer records that need attention for drop ship coordination.

Criteria

CRITERION	VALUE
Record type	Customer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the drop ship coordination process.
- **customer** ↗ - connected through the drop ship coordination process.

Purchase Request Approval Review Search 264

Source: `Saved-Searches/customsearch_demo_drop_ship_coordination_264`

Purchase Request Approval Review Search 264 lists Vendor Payment records that need review for drop ship coordination.

Purpose

This saved search shows Vendor Payment records that need attention for drop ship coordination.

Criteria

CRITERION	VALUE
Record type	Vendor Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the drop ship coordination process.
- **vendor-payment** ↗ - connected through the drop ship coordination process.

Backorder Review Queue Review Search 47

Source: `Saved-Searches/customsearch_demo_employee_approval_limits_047`

Backorder Review Queue Review Search 47 lists Item Fulfillment records that need review for employee approval limits.

Purpose

This saved search shows Item Fulfillment records that need attention for employee approval limits.

Criteria

CRITERION	VALUE
Record type	Item Fulfillment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the employee approval limits process.
- **item-fulfillment** ↗ - connected through the employee approval limits process.

Vendor Payment Release Review Search 108

Source: `Saved-Searches/customsearch_demo_employee_approval_limits_108`

Vendor Payment Release Review Search 108 lists Sales Return records that need review for employee approval limits.

Purpose

This saved search shows Sales Return records that need attention for employee approval limits.

Criteria

CRITERION	VALUE
Record type	Sales Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the employee approval limits process.
- **sales-return** ↗ - connected through the employee approval limits process.

Commission Eligibility Flags Review Search 169

Source: `Saved-Searches/customsearch_demo_employee_approval_limits_169`

Commission Eligibility Flags Review Search 169 lists Sales Order records that need review for employee approval limits.

Purpose

This saved search shows Sales Order records that need attention for employee approval limits.

Criteria

CRITERION	VALUE
Record type	Sales Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the employee approval limits process.
- **sales-order** ↗ - connected through the employee approval limits process.

Cash Sale Exception Review Review Search 230

Source: `Saved-Searches/customsearch_demo_employee_approval_limits_230`

Cash Sale Exception Review Review Search 230 lists Credit Memo records that need review for employee approval limits.

Purpose

This saved search shows Credit Memo records that need attention for employee approval limits.

Criteria

CRITERION	VALUE
Record type	Credit Memo
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the employee approval limits process.
- **credit-memo** ↗ - connected through the employee approval limits process.

Vendor Payment Release Review Search 291

Source: `Saved-Searches/customsearch_demo_employee_approval_limits_291`

Vendor Payment Release Review Search 291 lists Term records that need review for employee approval limits.

Purpose

This saved search shows Term records that need attention for employee approval limits.

Criteria

CRITERION	VALUE
Record type	Term
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the employee approval limits process.
- **term** ↗ - connected through the employee approval limits process.

Support Intake Triage Review Search 49

Source: `Saved-Searches/customsearch_demo_expense_approval_routing_049`

Support Intake Triage Review Search 49 lists Lead records that need review for expense approval routing.

Purpose

This saved search shows Lead records that need attention for expense approval routing.

Criteria

CRITERION	VALUE
Record type	Lead
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the expense approval routing process.
- **lead** ↗ - connected through the expense approval routing process.

Case Escalation Management Review Search 110

Source: `Saved-Searches/customsearch_demo_expense_approval_routing_110`

Case Escalation Management Review Search 110 lists Partner records that need review for expense approval routing.

Purpose

This saved search shows Partner records that need attention for expense approval routing.

Criteria

CRITERION	VALUE
Record type	Partner
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the expense approval routing process.
- **partner** ↗ - connected through the expense approval routing process.

Purchase Request Approval Review Search 171

Source: `Saved-Searches/customsearch_demo_expense_approval_routing_171`

Purchase Request Approval Review Search 171 lists Return Authorization records that need review for expense approval routing.

Purpose

This saved search shows Return Authorization records that need attention for expense approval routing.

Criteria

CRITERION	VALUE
Record type	Return Authorization
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the expense approval routing process.
- **return-authorization** ↗ - connected through the expense approval routing process.

Purchase Request Approval Review Search 232

Source: `Saved-Searches/customsearch_demo_expense_approval_routing_232`

Purchase Request Approval Review Search 232 lists Bin records that need review for expense approval routing.

Purpose

This saved search shows Bin records that need attention for expense approval routing.

Criteria

CRITERION	VALUE
Record type	Bin
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the expense approval routing process.
- **bin** ↗ - connected through the expense approval routing process.

Campaign Response Routing Review Search 293

Source: `Saved-Searches/customsearch_demo_expense_approval_routing_293`

Campaign Response Routing Review Search 293 lists Inventory Item records that need review for expense approval routing.

Purpose

This saved search shows Inventory Item records that need attention for expense approval routing.

Criteria

CRITERION	VALUE
Record type	Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the expense approval routing process.
- **inventory-item** ↗ - connected through the expense approval routing process.

Pricing Review Process Review Search 5

Source: `Saved-Searches/customsearch_demo_forecast_adjustment_review_005`

Pricing Review Process Review Search 5 lists Calendar Event records that need review for forecast adjustment review.

Purpose

This saved search shows Calendar Event records that need attention for forecast adjustment review.

Criteria

CRITERION	VALUE
Record type	Calendar Event
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the forecast adjustment review process.
- **calendar-event** ↗ - connected through the forecast adjustment review process.

Pricing Review Process Review Search 66

Source: `Saved-Searches/customsearch_demo_forecast_adjustment_review_066`

Pricing Review Process Review Search 66 lists Assembly Item records that need review for forecast adjustment review.

Purpose

This saved search shows Assembly Item records that need attention for forecast adjustment review.

Criteria

CRITERION	VALUE
Record type	Assembly Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the forecast adjustment review process.
- **assembly-item** ↗ - connected through the forecast adjustment review process.

Purchase Request Approval Review Search 127

Source: `Saved-Searches/customsearch_demo_forecast_adjustment_review_127`

Purchase Request Approval Review Search 127 lists Transfer Order records that need review for forecast adjustment review.

Purpose

This saved search shows Transfer Order records that need attention for forecast adjustment review.

Criteria

CRITERION	VALUE
Record type	Transfer Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the forecast adjustment review process.
- **transfer-order** ↗ - connected through the forecast adjustment review process.

Purchase Request Approval Review Search 188

Source: `Saved-Searches/customsearch_demo_forecast_adjustment_review_188`

Purchase Request Approval Review Search 188 lists Price Level records that need review for forecast adjustment review.

Purpose

This saved search shows Price Level records that need attention for forecast adjustment review.

Criteria

CRITERION	VALUE
Record type	Price Level
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the forecast adjustment review process.
- **price-level** ↗ - connected through the forecast adjustment review process.

Support Intake Triage Review Search 249

Source: `Saved-Searches/customsearch_demo_forecast_adjustment_review_249`

Support Intake Triage Review Search 249 lists Employee records that need review for forecast adjustment review.

Purpose

This saved search shows Employee records that need attention for forecast adjustment review.

Criteria

CRITERION	VALUE
Record type	Employee
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the forecast adjustment review process.
- **employee** ↗ - connected through the forecast adjustment review process.

Vendor Payment Release Review Search 310

Source: `Saved-Searches/customsearch_demo_forecast_adjustment_review_310`

Vendor Payment Release Review Search 310 lists Inventory Adjustment records that need review for forecast adjustment review.

Purpose

This saved search shows Inventory Adjustment records that need attention for forecast adjustment review.

Criteria

CRITERION	VALUE
Record type	Inventory Adjustment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the forecast adjustment review process.
- **inventory-adjustment** ↗ - connected through the forecast adjustment review process.

Billing Schedule Monitor Review Search 14

Source: `Saved-Searches/customsearch_demo_fulfillment_hold_automation_014`

Billing Schedule Monitor Review Search 14 lists Estimate records that need review for fulfillment hold automation.

Purpose

This saved search shows Estimate records that need attention for fulfillment hold automation.

Criteria

CRITERION	VALUE
Record type	Estimate
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the fulfillment hold automation process.
- **estimate** ↗ - connected through the fulfillment hold automation process.

Campaign Response Routing Review Search 75

Source: `Saved-Searches/customsearch_demo_fulfillment_hold_automation_075`

Campaign Response Routing Review Search 75 lists Inventory Transfer records that need review for fulfillment hold automation.

Purpose

This saved search shows Inventory Transfer records that need attention for fulfillment hold automation.

Criteria

CRITERION	VALUE
Record type	Inventory Transfer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the fulfillment hold automation process.
- **inventory-transfer** ↗ - connected through the fulfillment hold automation process.

Case Escalation Management Review Search 136

Source: `Saved-Searches/customsearch_demo_fulfillment_hold_automation_136`

Case Escalation Management Review Search 136 lists Vendor records that need review for fulfillment hold automation.

Purpose

This saved search shows Vendor records that need attention for fulfillment hold automation.

Criteria

CRITERION	VALUE
Record type	Vendor
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the fulfillment hold automation process.
- **vendor** ↗ - connected through the fulfillment hold automation process.

Case Escalation Management Review Search 197

Source: `Saved-Searches/customsearch_demo_fulfillment_hold_automation_197`

Case Escalation Management Review Search 197 lists Purchase Requisition records that need review for fulfillment hold automation.

Purpose

This saved search shows Purchase Requisition records that need attention for fulfillment hold automation.

Criteria

CRITERION	VALUE
Record type	Purchase Requisition
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the fulfillment hold automation process.
- **purchase-requisition** ↗ - connected through the fulfillment hold automation process.

Contract Renewal Alerts Review Search 258

Source: `Saved-Searches/customsearch_demo_fulfillment_hold_automation_258`

Contract Renewal Alerts Review Search 258 lists Billing Schedule records that need review for fulfillment hold automation.

Purpose

This saved search shows Billing Schedule records that need attention for fulfillment hold automation.

Criteria

CRITERION	VALUE
Record type	Billing Schedule
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the fulfillment hold automation process.
- **billing-schedule** ↗ - connected through the fulfillment hold automation process.

Case Follow-up Reminder Review Search 31

Source: `Saved-Searches/customsearch_demo_inventory_count_reconciliation_031`

Case Follow-up Reminder Review Search 31 lists Class records that need review for inventory count reconciliation.

Purpose

This saved search shows Class records that need attention for inventory count reconciliation.

Criteria

CRITERION	VALUE
Record type	Class
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the inventory count reconciliation process.
- **class** ↗ - connected through the inventory count reconciliation process.

Purchase Request Approval Review Search 92

Source: `Saved-Searches/customsearch_demo_inventory_count_reconciliation_092`

Purchase Request Approval Review Search 92 lists Support Case records that need review for inventory count reconciliation.

Purpose

This saved search shows Support Case records that need attention for inventory count reconciliation.

Criteria

CRITERION	VALUE
Record type	Support Case
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the inventory count reconciliation process.
- **support-case** ↗ - connected through the inventory count reconciliation process.

Support Intake Triage Review Search 153

Source: `Saved-Searches/customsearch_demo_inventory_count_reconciliation_153`

Support Intake Triage Review Search 153 lists Vendor Return records that need review for inventory count reconciliation.

Purpose

This saved search shows Vendor Return records that need attention for inventory count reconciliation.

Criteria

CRITERION	VALUE
Record type	Vendor Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the inventory count reconciliation process.
- **vendor-return** ↗ - connected through the inventory count reconciliation process.

Customer Credit Recheck Review Search 214

Source: `Saved-Searches/customsearch_demo_inventory_count_reconciliation_214`

Customer Credit Recheck Review Search 214 lists Purchase Order records that need review for inventory count reconciliation.

Purpose

This saved search shows Purchase Order records that need attention for inventory count reconciliation.

Criteria

CRITERION	VALUE
Record type	Purchase Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Customer Credit Recheck** ↗ - connected through the inventory count reconciliation process.
- **purchase-order** ↗ - connected through the inventory count reconciliation process.

Campaign Response Routing Review Search 275

Source: `Saved-Searches/customsearch_demo_inventory_count_reconciliation_275`

Campaign Response Routing Review Search 275 lists Customer Payment records that need review for inventory count reconciliation.

Purpose

This saved search shows Customer Payment records that need attention for inventory count reconciliation.

Criteria

CRITERION	VALUE
Record type	Customer Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the inventory count reconciliation process.
- **customer-payment** ↗ - connected through the inventory count reconciliation process.

Case Escalation Management Review Search 29

Source: `Saved-Searches/customsearch_demo_inventory_reorder_alerts_029`

Case Escalation Management Review Search 29 lists Purchase Requisition records that need review for inventory reorder alerts.

Purpose

This saved search shows Purchase Requisition records that need attention for inventory reorder alerts.

Criteria

CRITERION	VALUE
Record type	Purchase Requisition
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the inventory reorder alerts process.
- **purchase-requisition** ↗ - connected through the inventory reorder alerts process.

Case Escalation Management Review Search 90

Source: `Saved-Searches/customsearch_demo_inventory_reorder_alerts_090`

Case Escalation Management Review Search 90 lists Billing Schedule records that need review for inventory reorder alerts.

Purpose

This saved search shows Billing Schedule records that need attention for inventory reorder alerts.

Criteria

CRITERION	VALUE
Record type	Billing Schedule
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the inventory reorder alerts process.
- **billing-schedule** ↗ - connected through the inventory reorder alerts process.

Case Follow-up Reminder Review Search 151

Source: `Saved-Searches/customsearch_demo_inventory_reorder_alerts_151`

Case Follow-up Reminder Review Search 151 lists Expense Report records that need review for inventory reorder alerts.

Purpose

This saved search shows Expense Report records that need attention for inventory reorder alerts.

Criteria

CRITERION	VALUE
Record type	Expense Report
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the inventory reorder alerts process.
- **expense-report** ↗ - connected through the inventory reorder alerts process.

Vendor Payment Release Review Search 212

Source: `Saved-Searches/customsearch_demo_inventory_reorder_alerts_212`

Vendor Payment Release Review Search 212 lists Serialized Inventory Item records that need review for inventory reorder alerts.

Purpose

This saved search shows Serialized Inventory Item records that need attention for inventory reorder alerts.

Criteria

CRITERION	VALUE
Record type	Serialized Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the inventory reorder alerts process.
- **serialized-inventory-item** ↗ - connected through the inventory reorder alerts process.

Vendor Payment Release Review Search 273

Source: `Saved-Searches/customsearch_demo_inventory_reorder_alerts_273`

Vendor Payment Release Review Search 273 lists Lead records that need review for inventory reorder alerts.

Purpose

This saved search shows Lead records that need attention for inventory reorder alerts.

Criteria

CRITERION	VALUE
Record type	Lead
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the inventory reorder alerts process.
- **lead** ↗ - connected through the inventory reorder alerts process.

Campaign Response Routing Review Search 45

Source: `Saved-Searches/customsearch_demo_inventory_transfer_review_045`

Campaign Response Routing Review Search 45 lists Account records that need review for inventory transfer review.

Purpose

This saved search shows Account records that need attention for inventory transfer review.

Criteria

CRITERION	VALUE
Record type	Account
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the inventory transfer review process.
- **account** ↗ - connected through the inventory transfer review process.

Billing Schedule Monitor Review Search 106

Source: `Saved-Searches/customsearch_demo_inventory_transfer_review_106`

Billing Schedule Monitor Review Search 106 lists Phone Call records that need review for inventory transfer review.

Purpose

This saved search shows Phone Call records that need attention for inventory transfer review.

Criteria

CRITERION	VALUE
Record type	Phone Call
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the inventory transfer review process.
- **phone-call** ↗ - connected through the inventory transfer review process.

Credit Hold Review Review Search 167

Source: `Saved-Searches/customsearch_demo_inventory_transfer_review_167`

Credit Hold Review Review Search 167 lists Kit Item records that need review for inventory transfer review.

Purpose

This saved search shows Kit Item records that need attention for inventory transfer review.

Criteria

CRITERION	VALUE
Record type	Kit Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the inventory transfer review process.
- **kit-item** ↗ - connected through the inventory transfer review process.

Contract Renewal Alerts Review Search 228

Source: `Saved-Searches/customsearch_demo_inventory_transfer_review_228`

Contract Renewal Alerts Review Search 228 lists Opportunity records that need review for inventory transfer review.

Purpose

This saved search shows Opportunity records that need attention for inventory transfer review.

Criteria

CRITERION	VALUE
Record type	Opportunity
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the inventory transfer review process.
- **opportunity** ↗ - connected through the inventory transfer review process.

Contract Renewal Alerts Review Search 289

Source: `Saved-Searches/customsearch_demo_inventory_transfer_review_289`

Contract Renewal Alerts Review Search 289 lists Campaign records that need review for inventory transfer review.

Purpose

This saved search shows Campaign records that need attention for inventory transfer review.

Criteria

CRITERION	VALUE
Record type	Campaign
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the inventory transfer review process.
- **campaign** ↗ - connected through the inventory transfer review process.

Vendor Payment Release Review Search 10

Source: `Saved-Searches/customsearch_demo_invoice_delivery_preferences_010`

Vendor Payment Release Review Search 10 lists Assembly Item records that need review for invoice delivery preferences.

Purpose

This saved search shows Assembly Item records that need attention for invoice delivery preferences.

Criteria

CRITERION	VALUE
Record type	Assembly Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the invoice delivery preferences process.
- **assembly-item** ↗ - connected through the invoice delivery preferences process.

Vendor Payment Release Review Search 71

Source: `Saved-Searches/customsearch_demo_invoice_delivery_preferences_071`

Vendor Payment Release Review Search 71 lists Transfer Order records that need review for invoice delivery preferences.

Purpose

This saved search shows Transfer Order records that need attention for invoice delivery preferences.

Criteria

CRITERION	VALUE
Record type	Transfer Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the invoice delivery preferences process.
- **transfer-order** ↗ - connected through the invoice delivery preferences process.

Cash Sale Exception Review Review Search 132

Source: `Saved-Searches/customsearch_demo_invoice_delivery_preferences_132`

Cash Sale Exception Review Review Search 132 lists Price Level records that need review for invoice delivery preferences.

Purpose

This saved search shows Price Level records that need attention for invoice delivery preferences.

Criteria

CRITERION	VALUE
Record type	Price Level
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the invoice delivery preferences process.
- **price-level** ↗ - connected through the invoice delivery preferences process.

Support Intake Triage Review Search 193

Source: `Saved-Searches/customsearch_demo_invoice_delivery_preferences_193`

Support Intake Triage Review Search 193 lists Employee records that need review for invoice delivery preferences.

Purpose

This saved search shows Employee records that need attention for invoice delivery preferences.

Criteria

CRITERION	VALUE
Record type	Employee
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the invoice delivery preferences process.
- **employee** ↗ - connected through the invoice delivery preferences process.

Pricing Review Process Review Search 254

Source: `Saved-Searches/customsearch_demo_invoice_delivery_preferences_254`

Pricing Review Process Review Search 254 lists Inventory Adjustment records that need review for invoice delivery preferences.

Purpose

This saved search shows Inventory Adjustment records that need attention for invoice delivery preferences.

Criteria

CRITERION	VALUE
Record type	Inventory Adjustment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the invoice delivery preferences process.
- **inventory-adjustment** ↗ - connected through the invoice delivery preferences process.

Backorder Review Queue Review Search 315

Source: `Saved-Searches/customsearch_demo_invoice_delivery_preferences_315`

Backorder Review Queue Review Search 315 lists Customer records that need review for invoice delivery preferences.

Purpose

This saved search shows Customer records that need attention for invoice delivery preferences.

Criteria

CRITERION	VALUE
Record type	Customer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the invoice delivery preferences process.
- **customer** ↗ - connected through the invoice delivery preferences process.

Commission Eligibility Flags Review Search 51

Source: `Saved-Searches/customsearch_demo_invoice_queue_automation_051`

Commission Eligibility Flags Review Search 51 lists Customer Payment records that need review for invoice queue automation.

Purpose

This saved search shows Customer Payment records that need attention for invoice queue automation.

Criteria

CRITERION	VALUE
Record type	Customer Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the invoice queue automation process.
- **customer-payment** ↗ - connected through the invoice queue automation process.

Cash Sale Exception Review Review Search 112

Source: `Saved-Searches/customsearch_demo_invoice_queue_automation_112`

Cash Sale Exception Review Review Search 112 lists Subsidiary records that need review for invoice queue automation.

Purpose

This saved search shows Subsidiary records that need attention for invoice queue automation.

Criteria

CRITERION	VALUE
Record type	Subsidiary
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the invoice queue automation process.
- **subsidiary** ↗ - connected through the invoice queue automation process.

Cash Sale Exception Review Review Search 173

Source: `Saved-Searches/customsearch_demo_invoice_queue_automation_173`

Cash Sale Exception Review Review Search 173 lists Calendar Event records that need review for invoice queue automation.

Purpose

This saved search shows Calendar Event records that need attention for invoice queue automation.

Criteria

CRITERION	VALUE
Record type	Calendar Event
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the invoice queue automation process.
- **calendar-event** ↗ - connected through the invoice queue automation process.

Vendor Payment Release Review Search 234

Source: `Saved-Searches/customsearch_demo_invoice_queue_automation_234`

Vendor Payment Release Review Search 234 lists Assembly Item records that need review for invoice queue automation.

Purpose

This saved search shows Assembly Item records that need attention for invoice queue automation.

Criteria

CRITERION	VALUE
Record type	Assembly Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the invoice queue automation process.
- **assembly-item** ↗ - connected through the invoice queue automation process.

Vendor Payment Release Review Search 295

Source: `Saved-Searches/customsearch_demo_invoice_queue_automation_295`

Vendor Payment Release Review Search 295 lists Transfer Order records that need review for invoice queue automation.

Purpose

This saved search shows Transfer Order records that need attention for invoice queue automation.

Criteria

CRITERION	VALUE
Record type	Transfer Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the invoice queue automation process.
- **transfer-order** ↗ - connected through the invoice queue automation process.

Campaign Response Routing Review Search 24

Source: `Saved-Searches/customsearch_demo_item_fulfillment_controls_024`

Campaign Response Routing Review Search 24 lists Vendor records that need review for item fulfillment controls.

Purpose

This saved search shows Vendor records that need attention for item fulfillment controls.

Criteria

CRITERION	VALUE
Record type	Vendor
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the item fulfillment controls process.
- **vendor** ↗ - connected through the item fulfillment controls process.

Pricing Review Process Review Search 85

Source: `Saved-Searches/customsearch_demo_item_fulfillment_controls_085`

Pricing Review Process Review Search 85 lists Purchase Requisition records that need review for item fulfillment controls.

Purpose

This saved search shows Purchase Requisition records that need attention for item fulfillment controls.

Criteria

CRITERION	VALUE
Record type	Purchase Requisition
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the item fulfillment controls process.
- **purchase-requisition** ↗ - connected through the item fulfillment controls process.

Campaign Response Routing Review Search 146

Source: `Saved-Searches/customsearch_demo_item_fulfillment_controls_146`

Campaign Response Routing Review Search 146 lists Billing Schedule records that need review for item fulfillment controls.

Purpose

This saved search shows Billing Schedule records that need attention for item fulfillment controls.

Criteria

CRITERION	VALUE
Record type	Billing Schedule
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the item fulfillment controls process.
- **billing-schedule** ↗ - connected through the item fulfillment controls process.

Support Intake Triage Review Search 207

Source: `Saved-Searches/customsearch_demo_item_fulfillment_controls_207`

Support Intake Triage Review Search 207 lists Expense Report records that need review for item fulfillment controls.

Purpose

This saved search shows Expense Report records that need attention for item fulfillment controls.

Criteria

CRITERION	VALUE
Record type	Expense Report
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the item fulfillment controls process.
- **expense-report** ↗ - connected through the item fulfillment controls process.

Case Follow-up Reminder Review Search 268

Source: `Saved-Searches/customsearch_demo_item_fulfillment_controls_268`

Case Follow-up Reminder Review Search 268 lists Serialized Inventory Item records that need review for item fulfillment controls.

Purpose

This saved search shows Serialized Inventory Item records that need attention for item fulfillment controls.

Criteria

CRITERION	VALUE
Record type	Serialized Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the item fulfillment controls process.
- **serialized-inventory-item** ↗ - connected through the item fulfillment controls process.

Purchase Request Approval Review Search 28

Source: `Saved-Searches/customsearch_demo_item_fulfillment_labeling_028`

Purchase Request Approval Review Search 28 lists Journal Entry records that need review for item fulfillment labeling.

Purpose

This saved search shows Journal Entry records that need attention for item fulfillment labeling.

Criteria

CRITERION	VALUE
Record type	Journal Entry
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the item fulfillment labeling process.
- **journal-entry** ↗ - connected through the item fulfillment labeling process.

Campaign Response Routing Review Search 89

Source: `Saved-Searches/customsearch_demo_item_fulfillment_labeling_089`

Campaign Response Routing Review Search 89 lists Lot Numbered Item records that need review for item fulfillment labeling.

Purpose

This saved search shows Lot Numbered Item records that need attention for item fulfillment labeling.

Criteria

CRITERION	VALUE
Record type	Lot Numbered Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the item fulfillment labeling process.
- **lot-numbered-item** ↗ - connected through the item fulfillment labeling process.

Pricing Review Process Review Search 150

Source: `Saved-Searches/customsearch_demo_item_fulfillment_labeling_150`

Pricing Review Process Review Search 150 lists Contact records that need review for item fulfillment labeling.

Purpose

This saved search shows Contact records that need attention for item fulfillment labeling.

Criteria

CRITERION	VALUE
Record type	Contact
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the item fulfillment labeling process.
- **contact** ↗ - connected through the item fulfillment labeling process.

Support Intake Triage Review Search 211

Source: `Saved-Searches/customsearch_demo_item_fulfillment_labeling_211`

Support Intake Triage Review Search 211 lists Prospect records that need review for item fulfillment labeling.

Purpose

This saved search shows Prospect records that need attention for item fulfillment labeling.

Criteria

CRITERION	VALUE
Record type	Prospect
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the item fulfillment labeling process.
- **prospect** ↗ - connected through the item fulfillment labeling process.

Support Intake Triage Review Search 272

Source: `Saved-Searches/customsearch_demo_item_fulfillment_labeling_272`

Support Intake Triage Review Search 272 lists Vendor Bill records that need review for item fulfillment labeling.

Purpose

This saved search shows Vendor Bill records that need attention for item fulfillment labeling.

Criteria

CRITERION	VALUE
Record type	Vendor Bill
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the item fulfillment labeling process.
- **vendor-bill** ↗ - connected through the item fulfillment labeling process.

Campaign Response Routing Review Search 58

Source: `Saved-Searches/customsearch_demo_item_margin_guardrails_058`

Campaign Response Routing Review Search 58 lists Invoice records that need review for item margin guardrails.

Purpose

This saved search shows Invoice records that need attention for item margin guardrails.

Criteria

CRITERION	VALUE
Record type	Invoice
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the item margin guardrails process.
- **invoice** ↗ - connected through the item margin guardrails process.

Billing Schedule Monitor Review Search 119

Source: `Saved-Searches/customsearch_demo_item_margin_guardrails_119`

Billing Schedule Monitor Review Search 119 lists Item Receipt records that need review for item margin guardrails.

Purpose

This saved search shows Item Receipt records that need attention for item margin guardrails.

Criteria

CRITERION	VALUE
Record type	Item Receipt
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the item margin guardrails process.
- **item-receipt** ↗ - connected through the item margin guardrails process.

Billing Schedule Monitor Review Search 180

Source: `Saved-Searches/customsearch_demo_item_margin_guardrails_180`

Billing Schedule Monitor Review Search 180 lists Sales Tax Item records that need review for item margin guardrails.

Purpose

This saved search shows Sales Tax Item records that need attention for item margin guardrails.

Criteria

CRITERION	VALUE
Record type	Sales Tax Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the item margin guardrails process.
- **sales-tax-item** ↗ - connected through the item margin guardrails process.

Commission Eligibility Flags Review Search 241

Source: `Saved-Searches/customsearch_demo_item_margin_guardrails_241`

Commission Eligibility Flags Review Search 241 lists Cash Sale records that need review for item margin guardrails.

Purpose

This saved search shows Cash Sale records that need attention for item margin guardrails.

Criteria

CRITERION	VALUE
Record type	Cash Sale
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the item margin guardrails process.
- **cash-sale** ↗ - connected through the item margin guardrails process.

Case Follow-up Reminder Review Search 302

Source: `Saved-Searches/customsearch_demo_item_margin_guardrails_302`

Case Follow-up Reminder Review Search 302 lists Payment Method records that need review for item margin guardrails.

Purpose

This saved search shows Payment Method records that need attention for item margin guardrails.

Criteria

CRITERION	VALUE
Record type	Payment Method
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the item margin guardrails process.
- **payment-method** ↗ - connected through the item margin guardrails process.

Purchase Request Approval Review Search 4

Source: `Saved-Searches/customsearch_demo_item_master_governance_004`

Purchase Request Approval Review Search 4 lists Opportunity records that need review for item master governance.

Purpose

This saved search shows Opportunity records that need attention for item master governance.

Criteria

CRITERION	VALUE
Record type	Opportunity
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the item master governance process.
- **opportunity** ↗ - connected through the item master governance process.

Pricing Review Process Review Search 65

Source: `Saved-Searches/customsearch_demo_item_master_governance_065`

Pricing Review Process Review Search 65 lists Campaign records that need review for item master governance.

Purpose

This saved search shows Campaign records that need attention for item master governance.

Criteria

CRITERION	VALUE
Record type	Campaign
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the item master governance process.
- **campaign** ↗ - connected through the item master governance process.

Billing Schedule Monitor Review Search 126

Source: `Saved-Searches/customsearch_demo_item_master_governance_126`

Billing Schedule Monitor Review Search 126 lists Estimate records that need review for item master governance.

Purpose

This saved search shows Estimate records that need attention for item master governance.

Criteria

CRITERION	VALUE
Record type	Estimate
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the item master governance process.
- **estimate** ↗ - connected through the item master governance process.

Pricing Review Process Review Search 187

Source: `Saved-Searches/customsearch_demo_item_master_governance_187`

Pricing Review Process Review Search 187 lists Inventory Transfer records that need review for item master governance.

Purpose

This saved search shows Inventory Transfer records that need attention for item master governance.

Criteria

CRITERION	VALUE
Record type	Inventory Transfer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the item master governance process.
- **inventory-transfer** ↗ - connected through the item master governance process.

Contract Renewal Alerts Review Search 248

Source: `Saved-Searches/customsearch_demo_item_master_governance_248`

Contract Renewal Alerts Review Search 248 lists Vendor records that need review for item master governance.

Purpose

This saved search shows Vendor records that need attention for item master governance.

Criteria

CRITERION	VALUE
Record type	Vendor
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the item master governance process.
- **vendor** ↗ - connected through the item master governance process.

Commission Eligibility Flags Review Search 309

Source: `Saved-Searches/customsearch_demo_item_master_governance_309`

Commission Eligibility Flags Review Search 309 lists Purchase Requisition records that need review for item master governance.

Purpose

This saved search shows Purchase Requisition records that need attention for item master governance.

Criteria

CRITERION	VALUE
Record type	Purchase Requisition
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the item master governance process.
- **purchase-requisition** ↗ - connected through the item master governance process.

Backorder Review Queue Review Search 38

Source: `Saved-Searches/customsearch_demo_journal_approval_controls_038`

Backorder Review Queue Review Search 38 lists Contact records that need review for journal approval controls.

Purpose

This saved search shows Contact records that need attention for journal approval controls.

Criteria

CRITERION	VALUE
Record type	Contact
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the journal approval controls process.
- **contact** ↗ - connected through the journal approval controls process.

Commission Eligibility Flags Review Search 99

Source: `Saved-Searches/customsearch_demo_journal_approval_controls_099`

Commission Eligibility Flags Review Search 99 lists Prospect records that need review for journal approval controls.

Purpose

This saved search shows Prospect records that need attention for journal approval controls.

Criteria

CRITERION	VALUE
Record type	Prospect
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the journal approval controls process.
- **prospect** ↗ - connected through the journal approval controls process.

Contract Renewal Alerts Review Search 160

Source: `Saved-Searches/customsearch_demo_journal_approval_controls_160`

Contract Renewal Alerts Review Search 160 lists Vendor Bill records that need review for journal approval controls.

Purpose

This saved search shows Vendor Bill records that need attention for journal approval controls.

Criteria

CRITERION	VALUE
Record type	Vendor Bill
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the journal approval controls process.
- **vendor-bill** ↗ - connected through the journal approval controls process.

Pricing Review Process Review Search 221

Source: `Saved-Searches/customsearch_demo_journal_approval_controls_221`

Pricing Review Process Review Search 221 lists Location records that need review for journal approval controls.

Purpose

This saved search shows Location records that need attention for journal approval controls.

Criteria

CRITERION	VALUE
Record type	Location
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the journal approval controls process.
- **location** ↗ - connected through the journal approval controls process.

Billing Schedule Monitor Review Search 282

Source: `Saved-Searches/customsearch_demo_journal_approval_controls_282`

Billing Schedule Monitor Review Search 282 lists Invoice records that need review for journal approval controls.

Purpose

This saved search shows Invoice records that need attention for journal approval controls.

Criteria

CRITERION	VALUE
Record type	Invoice
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the journal approval controls process.
- **invoice** ↗ - connected through the journal approval controls process.

Backorder Review Queue Review Search 1

Source: `Saved-Searches/customsearch_demo_order_approval_workflow_001`

Backorder Review Queue Review Search 1 lists Sales Order records that need review for order approval workflow.

Purpose

This saved search shows Sales Order records that need attention for order approval workflow.

Criteria

CRITERION	VALUE
Record type	Sales Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the order approval workflow process.
- **sales-order** ↗ - connected through the order approval workflow process.

Backorder Review Queue Review Search 62

Source: `Saved-Searches/customsearch_demo_order_approval_workflow_062`

Backorder Review Queue Review Search 62 lists Credit Memo records that need review for order approval workflow.

Purpose

This saved search shows Credit Memo records that need attention for order approval workflow.

Criteria

CRITERION	VALUE
Record type	Credit Memo
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the order approval workflow process.
- **credit-memo** ↗ - connected through the order approval workflow process.

Pricing Review Process Review Search 123

Source: `Saved-Searches/customsearch_demo_order_approval_workflow_123`

Pricing Review Process Review Search 123 lists Term records that need review for order approval workflow.

Purpose

This saved search shows Term records that need attention for order approval workflow.

Criteria

CRITERION	VALUE
Record type	Term
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the order approval workflow process.
- **term** ↗ - connected through the order approval workflow process.

Credit Hold Review Review Search 184

Source: `Saved-Searches/customsearch_demo_order_approval_workflow_184`

Credit Hold Review Review Search 184 lists Task records that need review for order approval workflow.

Purpose

This saved search shows Task records that need attention for order approval workflow.

Criteria

CRITERION	VALUE
Record type	Task
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the order approval workflow process.
- **task** ↗ - connected through the order approval workflow process.

Purchase Request Approval Review Search 245

Source: `Saved-Searches/customsearch_demo_order_approval_workflow_245`

Purchase Request Approval Review Search 245 lists Non-inventory Item records that need review for order approval workflow.

Purpose

This saved search shows Non-inventory Item records that need attention for order approval workflow.

Criteria

CRITERION	VALUE
Record type	Non-inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the order approval workflow process.
- **non-inventory-item** ↗ - connected through the order approval workflow process.

Purchase Request Approval Review Search 306

Source: `Saved-Searches/customsearch_demo_order_approval_workflow_306`

Purchase Request Approval Review Search 306 lists Assembly Build records that need review for order approval workflow.

Purpose

This saved search shows Assembly Build records that need attention for order approval workflow.

Criteria

CRITERION	VALUE
Record type	Assembly Build
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the order approval workflow process.
- **assembly-build** ↗ - connected through the order approval workflow process.

Cash Sale Exception Review Review Search 50

Source: `Saved-Searches/customsearch_demo_order_change_audit_050`

Cash Sale Exception Review Review Search 50 lists Phone Call records that need review for order change audit.

Purpose

This saved search shows Phone Call records that need attention for order change audit.

Criteria

CRITERION	VALUE
Record type	Phone Call
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the order change audit process.
- **phone-call** ↗ - connected through the order change audit process.

Case Follow-up Reminder Review Search 111

Source: `Saved-Searches/customsearch_demo_order_change_audit_111`

Case Follow-up Reminder Review Search 111 lists Kit Item records that need review for order change audit.

Purpose

This saved search shows Kit Item records that need attention for order change audit.

Criteria

CRITERION	VALUE
Record type	Kit Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the order change audit process.
- **kit-item** ↗ - connected through the order change audit process.

Case Follow-up Reminder Review Search 172

Source: `Saved-Searches/customsearch_demo_order_change_audit_172`

Case Follow-up Reminder Review Search 172 lists Opportunity records that need review for order change audit.

Purpose

This saved search shows Opportunity records that need attention for order change audit.

Criteria

CRITERION	VALUE
Record type	Opportunity
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the order change audit process.
- **opportunity** ↗ - connected through the order change audit process.

Contract Renewal Alerts Review Search 233

Source: `Saved-Searches/customsearch_demo_order_change_audit_233`

Contract Renewal Alerts Review Search 233 lists Campaign records that need review for order change audit.

Purpose

This saved search shows Campaign records that need attention for order change audit.

Criteria

CRITERION	VALUE
Record type	Campaign
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the order change audit process.
- **campaign** ↗ - connected through the order change audit process.

Billing Schedule Monitor Review Search 294

Source: `Saved-Searches/customsearch_demo_order_change_audit_294`

Billing Schedule Monitor Review Search 294 lists Estimate records that need review for order change audit.

Purpose

This saved search shows Estimate records that need attention for order change audit.

Criteria

CRITERION	VALUE
Record type	Estimate
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the order change audit process.
- **estimate** ↗ - connected through the order change audit process.

Case Escalation Management Review Search 16

Source: `Saved-Searches/customsearch_demo_partner_referral_tracking_016`

Case Escalation Management Review Search 16 lists Task records that need review for partner referral tracking.

Purpose

This saved search shows Task records that need attention for partner referral tracking.

Criteria

CRITERION	VALUE
Record type	Task
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the partner referral tracking process.
- **task** ↗ - connected through the partner referral tracking process.

Pricing Review Process Review Search 77

Source: `Saved-Searches/customsearch_demo_partner_referral_tracking_077`

Pricing Review Process Review Search 77 lists Non-inventory Item records that need review for partner referral tracking.

Purpose

This saved search shows Non-inventory Item records that need attention for partner referral tracking.

Criteria

CRITERION	VALUE
Record type	Non-inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the partner referral tracking process.
- **non-inventory-item** ↗ - connected through the partner referral tracking process.

Purchase Request Approval Review Search 138

Source: `Saved-Searches/customsearch_demo_partner_referral_tracking_138`

Purchase Request Approval Review Search 138 lists Assembly Build records that need review for partner referral tracking.

Purpose

This saved search shows Assembly Build records that need attention for partner referral tracking.

Criteria

CRITERION	VALUE
Record type	Assembly Build
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the partner referral tracking process.
- **assembly-build** ↗ - connected through the partner referral tracking process.

Case Escalation Management Review Search 199

Source: `Saved-Searches/customsearch_demo_partner_referral_tracking_199`

Case Escalation Management Review Search 199 lists Class records that need review for partner referral tracking.

Purpose

This saved search shows Class records that need attention for partner referral tracking.

Criteria

CRITERION	VALUE
Record type	Class
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the partner referral tracking process.
- **class** ↗ - connected through the partner referral tracking process.

Support Intake Triage Review Search 260

Source: `Saved-Searches/customsearch_demo_partner_referral_tracking_260`

Support Intake Triage Review Search 260 lists Support Case records that need review for partner referral tracking.

Purpose

This saved search shows Support Case records that need attention for partner referral tracking.

Criteria

CRITERION	VALUE
Record type	Support Case
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the partner referral tracking process.
- **support-case** ↗ - connected through the partner referral tracking process.

Pricing Review Process Review Search 42

Source: `Saved-Searches/customsearch_demo_payment_application_review_042`

Pricing Review Process Review Search 42 lists Department records that need review for payment application review.

Purpose

This saved search shows Department records that need attention for payment application review.

Criteria

CRITERION	VALUE
Record type	Department
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the payment application review process.
- **department** ↗ - connected through the payment application review process.

Purchase Request Approval Review Search 103

Source: `Saved-Searches/customsearch_demo_payment_application_review_103`

Purchase Request Approval Review Search 103 lists Item Fulfillment records that need review for payment application review.

Purpose

This saved search shows Item Fulfillment records that need attention for payment application review.

Criteria

CRITERION	VALUE
Record type	Item Fulfillment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the payment application review process.
- **item-fulfillment** ↗ - connected through the payment application review process.

Campaign Response Routing Review Search 164

Source: `Saved-Searches/customsearch_demo_payment_application_review_164`

Campaign Response Routing Review Search 164 lists Sales Return records that need review for payment application review.

Purpose

This saved search shows Sales Return records that need attention for payment application review.

Criteria

CRITERION	VALUE
Record type	Sales Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the payment application review process.
- **sales-return** ↗ - connected through the payment application review process.

Commission Eligibility Flags Review Search 225

Source: `Saved-Searches/customsearch_demo_payment_application_review_225`

Commission Eligibility Flags Review Search 225 lists Sales Order records that need review for payment application review.

Purpose

This saved search shows Sales Order records that need attention for payment application review.

Criteria

CRITERION	VALUE
Record type	Sales Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the payment application review process.
- **sales-order** ↗ - connected through the payment application review process.

Vendor Payment Release Review Search 286

Source: `Saved-Searches/customsearch_demo_payment_application_review_286`

Vendor Payment Release Review Search 286 lists Credit Memo records that need review for payment application review.

Purpose

This saved search shows Credit Memo records that need attention for payment application review.

Criteria

CRITERION	VALUE
Record type	Credit Memo
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the payment application review process.
- **credit-memo** ↗ - connected through the payment application review process.

Purchase Request Approval Review Search 33

Source: `Saved-Searches/customsearch_demo_price_level_governance_033`

Purchase Request Approval Review Search 33 lists Lot Numbered Item records that need review for price level governance.

Purpose

This saved search shows Lot Numbered Item records that need attention for price level governance.

Criteria

CRITERION	VALUE
Record type	Lot Numbered Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the price level governance process.
- **lot-numbered-item** ↗ - connected through the price level governance process.

Purchase Request Approval Review Search 94

Source: `Saved-Searches/customsearch_demo_price_level_governance_094`

Purchase Request Approval Review Search 94 lists Contact records that need review for price level governance.

Purpose

This saved search shows Contact records that need attention for price level governance.

Criteria

CRITERION	VALUE
Record type	Contact
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the price level governance process.
- **contact** ↗ - connected through the price level governance process.

Pricing Review Process Review Search 155

Source: `Saved-Searches/customsearch_demo_price_level_governance_155`

Pricing Review Process Review Search 155 lists Prospect records that need review for price level governance.

Purpose

This saved search shows Prospect records that need attention for price level governance.

Criteria

CRITERION	VALUE
Record type	Prospect
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the price level governance process.
- **prospect** ↗ - connected through the price level governance process.

Support Intake Triage Review Search 216

Source: `Saved-Searches/customsearch_demo_price_level_governance_216`

Support Intake Triage Review Search 216 lists Vendor Bill records that need review for price level governance.

Purpose

This saved search shows Vendor Bill records that need attention for price level governance.

Criteria

CRITERION	VALUE
Record type	Vendor Bill
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the price level governance process.
- **vendor-bill** ↗ - connected through the price level governance process.

Support Intake Triage Review Search 277

Source: `Saved-Searches/customsearch_demo_price_level_governance_277`

Support Intake Triage Review Search 277 lists Location records that need review for price level governance.

Purpose

This saved search shows Location records that need attention for price level governance.

Criteria

CRITERION	VALUE
Record type	Location
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the price level governance process.
- **location** ↗ - connected through the price level governance process.

Case Escalation Management Review Search 18

Source: `Saved-Searches/customsearch_demo_pricing_review_process_018`

Case Escalation Management Review Search 18 lists Customer Deposit records that need review for pricing review process.

Purpose

This saved search shows Customer Deposit records that need attention for pricing review process.

Criteria

CRITERION	VALUE
Record type	Customer Deposit
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the pricing review process process.
- **customer-deposit** ↗ - connected through the pricing review process process.

Case Escalation Management Review Search 79

Source: `Saved-Searches/customsearch_demo_pricing_review_process_079`

Case Escalation Management Review Search 79 lists Shipping Item records that need review for pricing review process.

Purpose

This saved search shows Shipping Item records that need attention for pricing review process.

Criteria

CRITERION	VALUE
Record type	Shipping Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the pricing review process process.
- **shipping-item** ↗ - connected through the pricing review process process.

Purchase Request Approval Review Search 140

Source: `Saved-Searches/customsearch_demo_pricing_review_process_140`

Purchase Request Approval Review Search 140 lists Journal Entry records that need review for pricing review process.

Purpose

This saved search shows Journal Entry records that need attention for pricing review process.

Criteria

CRITERION	VALUE
Record type	Journal Entry
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the pricing review process process.
- **journal-entry** ↗ - connected through the pricing review process process.

Commission Eligibility Flags Review Search 201

Source: `Saved-Searches/customsearch_demo_pricing_review_process_201`

Commission Eligibility Flags Review Search 201 lists Lot Numbered Item records that need review for pricing review process.

Purpose

This saved search shows Lot Numbered Item records that need attention for pricing review process.

Criteria

CRITERION	VALUE
Record type	Lot Numbered Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the pricing review process process.
- **lot-numbered-item** ↗ - connected through the pricing review process process.

Vendor Payment Release Review Search 262

Source: `Saved-Searches/customsearch_demo_pricing_review_process_262`

Vendor Payment Release Review Search 262 lists Contact records that need review for pricing review process.

Purpose

This saved search shows Contact records that need attention for pricing review process.

Criteria

CRITERION	VALUE
Record type	Contact
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the pricing review process process.
- **contact** ↗ - connected through the pricing review process process.

Case Escalation Management Review Search 36

Source: `Saved-Searches/customsearch_demo_project_billing_review_036`

Case Escalation Management Review Search 36 lists Support Case records that need review for project billing review.

Purpose

This saved search shows Support Case records that need attention for project billing review.

Criteria

CRITERION	VALUE
Record type	Support Case
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the project billing review process.
- **support-case** ↗ - connected through the project billing review process.

Purchase Request Approval Review Search 97

Source: `Saved-Searches/customsearch_demo_project_billing_review_097`

Purchase Request Approval Review Search 97 lists Vendor Return records that need review for project billing review.

Purpose

This saved search shows Vendor Return records that need attention for project billing review.

Criteria

CRITERION	VALUE
Record type	Vendor Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the project billing review process.
- **vendor-return** ↗ - connected through the project billing review process.

Case Follow-up Reminder Review Search 158

Source: `Saved-Searches/customsearch_demo_project_billing_review_158`

Case Follow-up Reminder Review Search 158 lists Purchase Order records that need review for project billing review.

Purpose

This saved search shows Purchase Order records that need attention for project billing review.

Criteria

CRITERION	VALUE
Record type	Purchase Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the project billing review process.
- **purchase-order** ↗ - connected through the project billing review process.

Support Intake Triage Review Search 219

Source: `Saved-Searches/customsearch_demo_project_billing_review_219`

Support Intake Triage Review Search 219 lists Customer Payment records that need review for project billing review.

Purpose

This saved search shows Customer Payment records that need attention for project billing review.

Criteria

CRITERION	VALUE
Record type	Customer Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the project billing review process.
- **customer-payment** ↗ - connected through the project billing review process.

Vendor Payment Release Review Search 280

Source: `Saved-Searches/customsearch_demo_project_billing_review_280`

Vendor Payment Release Review Search 280 lists Subsidiary records that need review for project billing review.

Purpose

This saved search shows Subsidiary records that need attention for project billing review.

Criteria

CRITERION	VALUE
Record type	Subsidiary
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the project billing review process.
- **subsidiary** ↗ - connected through the project billing review process.

Pricing Review Process Review Search 34

Source: `Saved-Searches/customsearch_demo_project_task_assignment_034`

Pricing Review Process Review Search 34 lists Billing Schedule records that need review for project task assignment.

Purpose

This saved search shows Billing Schedule records that need attention for project task assignment.

Criteria

CRITERION	VALUE
Record type	Billing Schedule
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the project task assignment process.
- **billing-schedule** ↗ - connected through the project task assignment process.

Credit Hold Review Review Search 95

Source: `Saved-Searches/customsearch_demo_project_task_assignment_095`

Credit Hold Review Review Search 95 lists Expense Report records that need review for project task assignment.

Purpose

This saved search shows Expense Report records that need attention for project task assignment.

Criteria

CRITERION	VALUE
Record type	Expense Report
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the project task assignment process.
- **expense-report** ↗ - connected through the project task assignment process.

Contract Renewal Alerts Review Search 156

Source: `Saved-Searches/customsearch_demo_project_task_assignment_156`

Contract Renewal Alerts Review Search 156 lists Serialized Inventory Item records that need review for project task assignment.

Purpose

This saved search shows Serialized Inventory Item records that need attention for project task assignment.

Criteria

CRITERION	VALUE
Record type	Serialized Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the project task assignment process.
- **serialized-inventory-item** ↗ - connected through the project task assignment process.

Purchase Request Approval Review Search 217

Source: `Saved-Searches/customsearch_demo_project_task_assignment_217`

Purchase Request Approval Review Search 217 lists Lead records that need review for project task assignment.

Purpose

This saved search shows Lead records that need attention for project task assignment.

Criteria

CRITERION	VALUE
Record type	Lead
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the project task assignment process.
- **lead** ↗ - connected through the project task assignment process.

Campaign Response Routing Review Search 278

Source: `Saved-Searches/customsearch_demo_project_task_assignment_278`

Campaign Response Routing Review Search 278 lists Partner records that need review for project task assignment.

Purpose

This saved search shows Partner records that need attention for project task assignment.

Criteria

CRITERION	VALUE
Record type	Partner
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the project task assignment process.
- **partner** ↗ - connected through the project task assignment process.

Credit Hold Review Review Search 39

Source: `Saved-Searches/customsearch_demo_purchase_order_closeout_039`

Credit Hold Review Review Search 39 lists Expense Report records that need review for purchase order closeout.

Purpose

This saved search shows Expense Report records that need attention for purchase order closeout.

Criteria

CRITERION	VALUE
Record type	Expense Report
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the purchase order closeout process.
- **expense-report** ↗ - connected through the purchase order closeout process.

Backorder Review Queue Review Search 100

Source: `Saved-Searches/customsearch_demo_purchase_order_closeout_100`

Backorder Review Queue Review Search 100 lists Serialized Inventory Item records that need review for purchase order closeout.

Purpose

This saved search shows Serialized Inventory Item records that need attention for purchase order closeout.

Criteria

CRITERION	VALUE
Record type	Serialized Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the purchase order closeout process.
- **serialized-inventory-item** ↗ - connected through the purchase order closeout process.

Backorder Review Queue Review Search 161

Source: `Saved-Searches/customsearch_demo_purchase_order_closeout_161`

Backorder Review Queue Review Search 161 lists Lead records that need review for purchase order closeout.

Purpose

This saved search shows Lead records that need attention for purchase order closeout.

Criteria

CRITERION	VALUE
Record type	Lead
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the purchase order closeout process.
- **lead** ↗ - connected through the purchase order closeout process.

Purchase Request Approval Review Search 222

Source: `Saved-Searches/customsearch_demo_purchase_order_closeout_222`

Purchase Request Approval Review Search 222 lists Partner records that need review for purchase order closeout.

Purpose

This saved search shows Partner records that need attention for purchase order closeout.

Criteria

CRITERION	VALUE
Record type	Partner
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the purchase order closeout process.
- **partner** ↗ - connected through the purchase order closeout process.

Purchase Request Approval Review Search 283

Source: `Saved-Searches/customsearch_demo_purchase_order_closeout_283`

Purchase Request Approval Review Search 283 lists Return Authorization records that need review for purchase order closeout.

Purpose

This saved search shows Return Authorization records that need attention for purchase order closeout.

Criteria

CRITERION	VALUE
Record type	Return Authorization
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the purchase order closeout process.
- **return-authorization** ↗ - connected through the purchase order closeout process.

Campaign Response Routing Review Search 9

Source: `Saved-Searches/customsearch_demo_purchase_price_variance_review_009`

Campaign Response Routing Review Search 9 lists Campaign records that need review for purchase price variance review.

Purpose

This saved search shows Campaign records that need attention for purchase price variance review.

Criteria

CRITERION	VALUE
Record type	Campaign
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the purchase price variance review process.
- **campaign** ↗ - connected through the purchase price variance review process.

Purchase Request Approval Review Search 70

Source: `Saved-Searches/customsearch_demo_purchase_price_variance_review_070`

Purchase Request Approval Review Search 70 lists Estimate records that need review for purchase price variance review.

Purpose

This saved search shows Estimate records that need attention for purchase price variance review.

Criteria

CRITERION	VALUE
Record type	Estimate
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the purchase price variance review process.
- **estimate** ↗ - connected through the purchase price variance review process.

Case Follow-up Reminder Review Search 131

Source: `Saved-Searches/customsearch_demo_purchase_price_variance_review_131`

Case Follow-up Reminder Review Search 131 lists Inventory Transfer records that need review for purchase price variance review.

Purpose

This saved search shows Inventory Transfer records that need attention for purchase price variance review.

Criteria

CRITERION	VALUE
Record type	Inventory Transfer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the purchase price variance review process.
- **inventory-transfer** ↗ - connected through the purchase price variance review process.

Support Intake Triage Review Search 192

Source: `Saved-Searches/customsearch_demo_purchase_price_variance_review_192`

Support Intake Triage Review Search 192 lists Vendor records that need review for purchase price variance review.

Purpose

This saved search shows Vendor records that need attention for purchase price variance review.

Criteria

CRITERION	VALUE
Record type	Vendor
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the purchase price variance review process.
- **vendor** ↗ - connected through the purchase price variance review process.

Case Follow-up Reminder Review Search 253

Source: `Saved-Searches/customsearch_demo_purchase_price_variance_review_253`

Case Follow-up Reminder Review Search 253 lists Purchase Requisition records that need review for purchase price variance review.

Purpose

This saved search shows Purchase Requisition records that need attention for purchase price variance review.

Criteria

CRITERION	VALUE
Record type	Purchase Requisition
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the purchase price variance review process.
- **purchase-requisition** ↗ - connected through the purchase price variance review process.

Vendor Payment Release Review Search 314

Source: `Saved-Searches/customsearch_demo_purchase_price_variance_review_314`

Vendor Payment Release Review Search 314 lists Billing Schedule records that need review for purchase price variance review.

Purpose

This saved search shows Billing Schedule records that need attention for purchase price variance review.

Criteria

CRITERION	VALUE
Record type	Billing Schedule
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the purchase price variance review process.
- **billing-schedule** ↗ - connected through the purchase price variance review process.

Pricing Review Process Review Search 35

Source: `Saved-Searches/customsearch_demo_purchase_request_approval_035`

Pricing Review Process Review Search 35 lists Customer records that need review for purchase request approval.

Purpose

This saved search shows Customer records that need attention for purchase request approval.

Criteria

CRITERION	VALUE
Record type	Customer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the purchase request approval process.
- **customer** ↗ - connected through the purchase request approval process.

Campaign Response Routing Review Search 96

Source: `Saved-Searches/customsearch_demo_purchase_request_approval_096`

Campaign Response Routing Review Search 96 lists Vendor Payment records that need review for purchase request approval.

Purpose

This saved search shows Vendor Payment records that need attention for purchase request approval.

Criteria

CRITERION	VALUE
Record type	Vendor Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the purchase request approval process.
- **vendor-payment** ↗ - connected through the purchase request approval process.

Contract Renewal Alerts Review Search 157

Source: `Saved-Searches/customsearch_demo_purchase_request_approval_157`

Contract Renewal Alerts Review Search 157 lists Account records that need review for purchase request approval.

Purpose

This saved search shows Account records that need attention for purchase request approval.

Criteria

CRITERION	VALUE
Record type	Account
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the purchase request approval process.
- **account** ↗ - connected through the purchase request approval process.

Support Intake Triage Review Search 218

Source: `Saved-Searches/customsearch_demo_purchase_request_approval_218`

Support Intake Triage Review Search 218 lists Phone Call records that need review for purchase request approval.

Purpose

This saved search shows Phone Call records that need attention for purchase request approval.

Criteria

CRITERION	VALUE
Record type	Phone Call
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the purchase request approval process.
- **phone-call** ↗ - connected through the purchase request approval process.

Support Intake Triage Review Search 279

Source: `Saved-Searches/customsearch_demo_purchase_request_approval_279`

Support Intake Triage Review Search 279 lists Kit Item records that need review for purchase request approval.

Purpose

This saved search shows Kit Item records that need attention for purchase request approval.

Criteria

CRITERION	VALUE
Record type	Kit Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the purchase request approval process.
- **kit-item** ↗ - connected through the purchase request approval process.

Cash Sale Exception Review Review Search 43

Source: `Saved-Searches/customsearch_demo_quote_approval_matrix_043`

Cash Sale Exception Review Review Search 43 lists Prospect records that need review for quote approval matrix.

Purpose

This saved search shows Prospect records that need attention for quote approval matrix.

Criteria

CRITERION	VALUE
Record type	Prospect
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the quote approval matrix process.
- **prospect** ↗ - connected through the quote approval matrix process.

Contract Renewal Alerts Review Search 104

Source: `Saved-Searches/customsearch_demo_quote_approval_matrix_104`

Contract Renewal Alerts Review Search 104 lists Vendor Bill records that need review for quote approval matrix.

Purpose

This saved search shows Vendor Bill records that need attention for quote approval matrix.

Criteria

CRITERION	VALUE
Record type	Vendor Bill
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the quote approval matrix process.
- **vendor-bill** ↗ - connected through the quote approval matrix process.

Vendor Payment Release Review Search 165

Source: `Saved-Searches/customsearch_demo_quote_approval_matrix_165`

Vendor Payment Release Review Search 165 lists Location records that need review for quote approval matrix.

Purpose

This saved search shows Location records that need attention for quote approval matrix.

Criteria

CRITERION	VALUE
Record type	Location
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the quote approval matrix process.
- **location** ↗ - connected through the quote approval matrix process.

Credit Hold Review Review Search 226

Source: `Saved-Searches/customsearch_demo_quote_approval_matrix_226`

Credit Hold Review Review Search 226 lists Invoice records that need review for quote approval matrix.

Purpose

This saved search shows Invoice records that need attention for quote approval matrix.

Criteria

CRITERION	VALUE
Record type	Invoice
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the quote approval matrix process.
- **invoice** ↗ - connected through the quote approval matrix process.

Billing Schedule Monitor Review Search 287

Source: `Saved-Searches/customsearch_demo_quote_approval_matrix_287`

Billing Schedule Monitor Review Search 287 lists Item Receipt records that need review for quote approval matrix.

Purpose

This saved search shows Item Receipt records that need attention for quote approval matrix.

Criteria

CRITERION	VALUE
Record type	Item Receipt
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the quote approval matrix process.
- **item-receipt** ↗ - connected through the quote approval matrix process.

Purchase Request Approval Review Search 30

Source: `Saved-Searches/customsearch_demo_quote_expiration_monitoring_030`

Purchase Request Approval Review Search 30 lists Inventory Adjustment records that need review for quote expiration monitoring.

Purpose

This saved search shows Inventory Adjustment records that need attention for quote expiration monitoring.

Criteria

CRITERION	VALUE
Record type	Inventory Adjustment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the quote expiration monitoring process.
- **inventory-adjustment** ↗ - connected through the quote expiration monitoring process.

Case Escalation Management Review Search 91

Source: `Saved-Searches/customsearch_demo_quote_expiration_monitoring_091`

Case Escalation Management Review Search 91 lists Customer records that need review for quote expiration monitoring.

Purpose

This saved search shows Customer records that need attention for quote expiration monitoring.

Criteria

CRITERION	VALUE
Record type	Customer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the quote expiration monitoring process.
- **customer** ↗ - connected through the quote expiration monitoring process.

Campaign Response Routing Review Search 152

Source: `Saved-Searches/customsearch_demo_quote_expiration_monitoring_152`

Campaign Response Routing Review Search 152 lists Vendor Payment records that need review for quote expiration monitoring.

Purpose

This saved search shows Vendor Payment records that need attention for quote expiration monitoring.

Criteria

CRITERION	VALUE
Record type	Vendor Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the quote expiration monitoring process.
- **vendor-payment** ↗ - connected through the quote expiration monitoring process.

Billing Schedule Monitor Review Search 213

Source: `Saved-Searches/customsearch_demo_quote_expiration_monitoring_213`

Billing Schedule Monitor Review Search 213 lists Account records that need review for quote expiration monitoring.

Purpose

This saved search shows Account records that need attention for quote expiration monitoring.

Criteria

CRITERION	VALUE
Record type	Account
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the quote expiration monitoring process.
- **account** ↗ - connected through the quote expiration monitoring process.

Billing Schedule Monitor Review Search 274

Source: `Saved-Searches/customsearch_demo_quote_expiration_monitoring_274`

Billing Schedule Monitor Review Search 274 lists Phone Call records that need review for quote expiration monitoring.

Purpose

This saved search shows Phone Call records that need attention for quote expiration monitoring.

Criteria

CRITERION	VALUE
Record type	Phone Call
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the quote expiration monitoring process.
- **phone-call** ↗ - connected through the quote expiration monitoring process.

Campaign Response Routing Review Search 3

Source: `Saved-Searches/customsearch_demo_renewal_opportunity_routing_003`

Campaign Response Routing Review Search 3 lists Return Authorization records that need review for renewal opportunity routing.

Purpose

This saved search shows Return Authorization records that need attention for renewal opportunity routing.

Criteria

CRITERION	VALUE
Record type	Return Authorization
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the renewal opportunity routing process.
- **return-authorization** ↗ - connected through the renewal opportunity routing process.

Case Escalation Management Review Search 64

Source: `Saved-Searches/customsearch_demo_renewal_opportunity_routing_064`

Case Escalation Management Review Search 64 lists Bin records that need review for renewal opportunity routing.

Purpose

This saved search shows Bin records that need attention for renewal opportunity routing.

Criteria

CRITERION	VALUE
Record type	Bin
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the renewal opportunity routing process.
- **bin** ↗ - connected through the renewal opportunity routing process.

Pricing Review Process Review Search 125

Source: `Saved-Searches/customsearch_demo_renewal_opportunity_routing_125`

Pricing Review Process Review Search 125 lists Inventory Item records that need review for renewal opportunity routing.

Purpose

This saved search shows Inventory Item records that need attention for renewal opportunity routing.

Criteria

CRITERION	VALUE
Record type	Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the renewal opportunity routing process.
- **inventory-item** ↗ - connected through the renewal opportunity routing process.

Pricing Review Process Review Search 186

Source: `Saved-Searches/customsearch_demo_renewal_opportunity_routing_186`

Pricing Review Process Review Search 186 lists Customer Deposit records that need review for renewal opportunity routing.

Purpose

This saved search shows Customer Deposit records that need attention for renewal opportunity routing.

Criteria

CRITERION	VALUE
Record type	Customer Deposit
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the renewal opportunity routing process.
- **customer-deposit** ↗ - connected through the renewal opportunity routing process.

Credit Hold Review Review Search 247

Source: `Saved-Searches/customsearch_demo_renewal_opportunity_routing_247`

Credit Hold Review Review Search 247 lists Shipping Item records that need review for renewal opportunity routing.

Purpose

This saved search shows Shipping Item records that need attention for renewal opportunity routing.

Criteria

CRITERION	VALUE
Record type	Shipping Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the renewal opportunity routing process.
- **shipping-item** ↗ - connected through the renewal opportunity routing process.

Vendor Payment Release Review Search 308

Source: `Saved-Searches/customsearch_demo_renewal_opportunity_routing_308`

Vendor Payment Release Review Search 308 lists Journal Entry records that need review for renewal opportunity routing.

Purpose

This saved search shows Journal Entry records that need attention for renewal opportunity routing.

Criteria

CRITERION	VALUE
Record type	Journal Entry
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the renewal opportunity routing process.
- **journal-entry** ↗ - connected through the renewal opportunity routing process.

Cash Sale Exception Review Review Search 2

Source: `Saved-Searches/customsearch_demo_return_authorization_processing_002`

Cash Sale Exception Review Review Search 2 lists Invoice records that need review for return authorization processing.

Purpose

This saved search shows Invoice records that need attention for return authorization processing.

Criteria

CRITERION	VALUE
Record type	Invoice
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the return authorization processing process.
- **invoice** ↗ - connected through the return authorization processing process.

Support Intake Triage Review Search 63

Source: `Saved-Searches/customsearch_demo_return_authorization_processing_063`

Support Intake Triage Review Search 63 lists Item Receipt records that need review for return authorization processing.

Purpose

This saved search shows Item Receipt records that need attention for return authorization processing.

Criteria

CRITERION	VALUE
Record type	Item Receipt
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the return authorization processing process.
- **item-receipt** ↗ - connected through the return authorization processing process.

Cash Sale Exception Review Review Search 124

Source: `Saved-Searches/customsearch_demo_return_authorization_processing_124`

Cash Sale Exception Review Review Search 124 lists Sales Tax Item records that need review for return authorization processing.

Purpose

This saved search shows Sales Tax Item records that need attention for return authorization processing.

Criteria

CRITERION	VALUE
Record type	Sales Tax Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the return authorization processing process.
- **sales-tax-item** ↗ - connected through the return authorization processing process.

Vendor Payment Release Review Search 185

Source: `Saved-Searches/customsearch_demo_return_authorization_processing_185`

Vendor Payment Release Review Search 185 lists Cash Sale records that need review for return authorization processing.

Purpose

This saved search shows Cash Sale records that need attention for return authorization processing.

Criteria

CRITERION	VALUE
Record type	Cash Sale
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the return authorization processing process.
- **cash-sale** ↗ - connected through the return authorization processing process.

Commission Eligibility Flags Review Search 246

Source: `Saved-Searches/customsearch_demo_return_authorization_processing_246`

Commission Eligibility Flags Review Search 246 lists Payment Method records that need review for return authorization processing.

Purpose

This saved search shows Payment Method records that need attention for return authorization processing.

Criteria

CRITERION	VALUE
Record type	Payment Method
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the return authorization processing process.
- **payment-method** ↗ - connected through the return authorization processing process.

Contract Renewal Alerts Review Search 307

Source: `Saved-Searches/customsearch_demo_return_authorization_processing_307`

Contract Renewal Alerts Review Search 307 lists Project records that need review for return authorization processing.

Purpose

This saved search shows Project records that need attention for return authorization processing.

Criteria

CRITERION	VALUE
Record type	Project
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the return authorization processing process.
- **project** ↗ - connected through the return authorization processing process.

Case Escalation Management Review Search 37

Source: `Saved-Searches/customsearch_demo_revenue_recognition_review_037`

Case Escalation Management Review Search 37 lists Work Order records that need review for revenue recognition review.

Purpose

This saved search shows Work Order records that need attention for revenue recognition review.

Criteria

CRITERION	VALUE
Record type	Work Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the revenue recognition review process.
- **work-order** ↗ - connected through the revenue recognition review process.

Purchase Request Approval Review Search 98

Source: `Saved-Searches/customsearch_demo_revenue_recognition_review_098`

Purchase Request Approval Review Search 98 lists Department records that need review for revenue recognition review.

Purpose

This saved search shows Department records that need attention for revenue recognition review.

Criteria

CRITERION	VALUE
Record type	Department
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the revenue recognition review process.
- **department** ↗ - connected through the revenue recognition review process.

Campaign Response Routing Review Search 159

Source: `Saved-Searches/customsearch_demo_revenue_recognition_review_159`

Campaign Response Routing Review Search 159 lists Item Fulfillment records that need review for revenue recognition review.

Purpose

This saved search shows Item Fulfillment records that need attention for revenue recognition review.

Criteria

CRITERION	VALUE
Record type	Item Fulfillment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the revenue recognition review process.
- **item-fulfillment** ↗ - connected through the revenue recognition review process.

Cash Sale Exception Review Review Search 220

Source: `Saved-Searches/customsearch_demo_revenue_recognition_review_220`

Cash Sale Exception Review Review Search 220 lists Sales Return records that need review for revenue recognition review.

Purpose

This saved search shows Sales Return records that need attention for revenue recognition review.

Criteria

CRITERION	VALUE
Record type	Sales Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the revenue recognition review process.
- **sales-return** ↗ - connected through the revenue recognition review process.

Cash Sale Exception Review Review Search 281

Source: `Saved-Searches/customsearch_demo_revenue_recognition_review_281`

Cash Sale Exception Review Review Search 281 lists Sales Order records that need review for revenue recognition review.

Purpose

This saved search shows Sales Order records that need attention for revenue recognition review.

Criteria

CRITERION	VALUE
Record type	Sales Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the revenue recognition review process.
- **sales-order** ↗ - connected through the revenue recognition review process.

Backorder Review Queue Review Search 46

Source: `Saved-Searches/customsearch_demo_sales_order_risk_review_046`

Backorder Review Queue Review Search 46 lists Purchase Order records that need review for sales order risk review.

Purpose

This saved search shows Purchase Order records that need attention for sales order risk review.

Criteria

CRITERION	VALUE
Record type	Purchase Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the sales order risk review process.
- **purchase-order** ↗ - connected through the sales order risk review process.

Billing Schedule Monitor Review Search 107

Source: `Saved-Searches/customsearch_demo_sales_order_risk_review_107`

Billing Schedule Monitor Review Search 107 lists Customer Payment records that need review for sales order risk review.

Purpose

This saved search shows Customer Payment records that need attention for sales order risk review.

Criteria

CRITERION	VALUE
Record type	Customer Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the sales order risk review process.
- **customer-payment** ↗ - connected through the sales order risk review process.

Pricing Review Process Review Search 168

Source: `Saved-Searches/customsearch_demo_sales_order_risk_review_168`

Pricing Review Process Review Search 168 lists Subsidiary records that need review for sales order risk review.

Purpose

This saved search shows Subsidiary records that need attention for sales order risk review.

Criteria

CRITERION	VALUE
Record type	Subsidiary
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the sales order risk review process.
- **subsidiary** ↗ - connected through the sales order risk review process.

Commission Eligibility Flags Review Search 229

Source: `Saved-Searches/customsearch_demo_sales_order_risk_review_229`

Commission Eligibility Flags Review Search 229 lists Calendar Event records that need review for sales order risk review.

Purpose

This saved search shows Calendar Event records that need attention for sales order risk review.

Criteria

CRITERION	VALUE
Record type	Calendar Event
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the sales order risk review process.
- **calendar-event** ↗ - connected through the sales order risk review process.

Vendor Payment Release Review Search 290

Source: `Saved-Searches/customsearch_demo_sales_order_risk_review_290`

Vendor Payment Release Review Search 290 lists Assembly Item records that need review for sales order risk review.

Purpose

This saved search shows Assembly Item records that need attention for sales order risk review.

Criteria

CRITERION	VALUE
Record type	Assembly Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the sales order risk review process.
- **assembly-item** ↗ - connected through the sales order risk review process.

Vendor Payment Release Review Search 48

Source: `Saved-Searches/customsearch_demo_sales_rep_assignment_rules_048`

Vendor Payment Release Review Search 48 lists Vendor Bill records that need review for sales rep assignment rules.

Purpose

This saved search shows Vendor Bill records that need attention for sales rep assignment rules.

Criteria

CRITERION	VALUE
Record type	Vendor Bill
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the sales rep assignment rules process.
- **vendor-bill** ↗ - connected through the sales rep assignment rules process.

Billing Schedule Monitor Review Search 109

Source: `Saved-Searches/customsearch_demo_sales_rep_assignment_rules_109`

Billing Schedule Monitor Review Search 109 lists Location records that need review for sales rep assignment rules.

Purpose

This saved search shows Location records that need attention for sales rep assignment rules.

Criteria

CRITERION	VALUE
Record type	Location
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the sales rep assignment rules process.
- **location** ↗ - connected through the sales rep assignment rules process.

Backorder Review Queue Review Search 170

Source: `Saved-Searches/customsearch_demo_sales_rep_assignment_rules_170`

Backorder Review Queue Review Search 170 lists Invoice records that need review for sales rep assignment rules.

Purpose

This saved search shows Invoice records that need attention for sales rep assignment rules.

Criteria

CRITERION	VALUE
Record type	Invoice
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the sales rep assignment rules process.
- **invoice** ↗ - connected through the sales rep assignment rules process.

Purchase Request Approval Review Search 231

Source: `Saved-Searches/customsearch_demo_sales_rep_assignment_rules_231`

Purchase Request Approval Review Search 231 lists Item Receipt records that need review for sales rep assignment rules.

Purpose

This saved search shows Item Receipt records that need attention for sales rep assignment rules.

Criteria

CRITERION	VALUE
Record type	Item Receipt
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the sales rep assignment rules process.
- **item-receipt** ↗ - connected through the sales rep assignment rules process.

Support Intake Triage Review Search 292

Source: `Saved-Searches/customsearch_demo_sales_rep_assignment_rules_292`

Support Intake Triage Review Search 292 lists Sales Tax Item records that need review for sales rep assignment rules.

Purpose

This saved search shows Sales Tax Item records that need attention for sales rep assignment rules.

Criteria

CRITERION	VALUE
Record type	Sales Tax Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the sales rep assignment rules process.
- **sales-tax-item** ↗ - connected through the sales rep assignment rules process.

Purchase Request Approval Review Search 11

Source: `Saved-Searches/customsearch_demo_sales_tax_exception_review_011`

Purchase Request Approval Review Search 11 lists Term records that need review for sales tax exception review.

Purpose

This saved search shows Term records that need attention for sales tax exception review.

Criteria

CRITERION	VALUE
Record type	Term
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the sales tax exception review process.
- **term** ↗ - connected through the sales tax exception review process.

Purchase Request Approval Review Search 72

Source: `Saved-Searches/customsearch_demo_sales_tax_exception_review_072`

Purchase Request Approval Review Search 72 lists Task records that need review for sales tax exception review.

Purpose

This saved search shows Task records that need attention for sales tax exception review.

Criteria

CRITERION	VALUE
Record type	Task
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the sales tax exception review process.
- **task** ↗ - connected through the sales tax exception review process.

Case Escalation Management Review Search 133

Source: `Saved-Searches/customsearch_demo_sales_tax_exception_review_133`

Case Escalation Management Review Search 133 lists Non-inventory Item records that need review for sales tax exception review.

Purpose

This saved search shows Non-inventory Item records that need attention for sales tax exception review.

Criteria

CRITERION	VALUE
Record type	Non-inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the sales tax exception review process.
- **non-inventory-item** ↗ - connected through the sales tax exception review process.

Pricing Review Process Review Search 194

Source: `Saved-Searches/customsearch_demo_sales_tax_exception_review_194`

Pricing Review Process Review Search 194 lists Assembly Build records that need review for sales tax exception review.

Purpose

This saved search shows Assembly Build records that need attention for sales tax exception review.

Criteria

CRITERION	VALUE
Record type	Assembly Build
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the sales tax exception review process.
- **assembly-build** ↗ - connected through the sales tax exception review process.

Vendor Payment Release Review Search 255

Source: `Saved-Searches/customsearch_demo_sales_tax_exception_review_255`

Vendor Payment Release Review Search 255 lists Class records that need review for sales tax exception review.

Purpose

This saved search shows Class records that need attention for sales tax exception review.

Criteria

CRITERION	VALUE
Record type	Class
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the sales tax exception review process.
- **class** ↗ - connected through the sales tax exception review process.

Purchase Request Approval Review Search 316

Source: `Saved-Searches/customsearch_demo_sales_tax_exception_review_316`

Purchase Request Approval Review Search 316 lists Support Case records that need review for sales tax exception review.

Purpose

This saved search shows Support Case records that need attention for sales tax exception review.

Criteria

CRITERION	VALUE
Record type	Support Case
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the sales tax exception review process.
- **support-case** ↗ - connected through the sales tax exception review process.

Case Follow-up Reminder Review Search 17

Source: `Saved-Searches/customsearch_demo_serialized_item_compliance_017`

Case Follow-up Reminder Review Search 17 lists Cash Sale records that need review for serialized item compliance.

Purpose

This saved search shows Cash Sale records that need attention for serialized item compliance.

Criteria

CRITERION	VALUE
Record type	Cash Sale
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the serialized item compliance process.
- **cash-sale** ↗ - connected through the serialized item compliance process.

Support Intake Triage Review Search 78

Source: `Saved-Searches/customsearch_demo_serialized_item_compliance_078`

Support Intake Triage Review Search 78 lists Payment Method records that need review for serialized item compliance.

Purpose

This saved search shows Payment Method records that need attention for serialized item compliance.

Criteria

CRITERION	VALUE
Record type	Payment Method
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the serialized item compliance process.
- **payment-method** ↗ - connected through the serialized item compliance process.

Cash Sale Exception Review Review Search 139

Source: `Saved-Searches/customsearch_demo_serialized_item_compliance_139`

Cash Sale Exception Review Review Search 139 lists Project records that need review for serialized item compliance.

Purpose

This saved search shows Project records that need attention for serialized item compliance.

Criteria

CRITERION	VALUE
Record type	Project
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the serialized item compliance process.
- **project** ↗ - connected through the serialized item compliance process.

Commission Eligibility Flags Review Search 200

Source: `Saved-Searches/customsearch_demo_serialized_item_compliance_200`

Commission Eligibility Flags Review Search 200 lists Service Item records that need review for serialized item compliance.

Purpose

This saved search shows Service Item records that need attention for serialized item compliance.

Criteria

CRITERION	VALUE
Record type	Service Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the serialized item compliance process.
- **service-item** ↗ - connected through the serialized item compliance process.

Contract Renewal Alerts Review Search 261

Source: `Saved-Searches/customsearch_demo_serialized_item_compliance_261`

Contract Renewal Alerts Review Search 261 lists Work Order records that need review for serialized item compliance.

Purpose

This saved search shows Work Order records that need attention for serialized item compliance.

Criteria

CRITERION	VALUE
Record type	Work Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the serialized item compliance process.
- **work-order** ↗ - connected through the serialized item compliance process.

Case Follow-up Reminder Review Search 32

Source: `Saved-Searches/customsearch_demo_service_case_sla_tracking_032`

Case Follow-up Reminder Review Search 32 lists Service Item records that need review for service case sla tracking.

Purpose

This saved search shows Service Item records that need attention for service case sla tracking.

Criteria

CRITERION	VALUE
Record type	Service Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the service case sla tracking process.
- **service-item** ↗ - connected through the service case sla tracking process.

Support Intake Triage Review Search 93

Source: `Saved-Searches/customsearch_demo_service_case_sla_tracking_093`

Support Intake Triage Review Search 93 lists Work Order records that need review for service case sla tracking.

Purpose

This saved search shows Work Order records that need attention for service case sla tracking.

Criteria

CRITERION	VALUE
Record type	Work Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the service case sla tracking process.
- **work-order** ↗ - connected through the service case sla tracking process.

Pricing Review Process Review Search 154

Source: `Saved-Searches/customsearch_demo_service_case_sla_tracking_154`

Pricing Review Process Review Search 154 lists Department records that need review for service case sla tracking.

Purpose

This saved search shows Department records that need attention for service case sla tracking.

Criteria

CRITERION	VALUE
Record type	Department
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the service case sla tracking process.
- **department** ↗ - connected through the service case sla tracking process.

Credit Hold Review Review Search 215

Source: `Saved-Searches/customsearch_demo_service_case_sla_tracking_215`

Credit Hold Review Review Search 215 lists Item Fulfillment records that need review for service case sla tracking.

Purpose

This saved search shows Item Fulfillment records that need attention for service case sla tracking.

Criteria

CRITERION	VALUE
Record type	Item Fulfillment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the service case sla tracking process.
- **item-fulfillment** ↗ - connected through the service case sla tracking process.

Billing Schedule Monitor Review Search 276

Source: `Saved-Searches/customsearch_demo_service_case_sla_tracking_276`

Billing Schedule Monitor Review Search 276 lists Sales Return records that need review for service case sla tracking.

Purpose

This saved search shows Sales Return records that need attention for service case sla tracking.

Criteria

CRITERION	VALUE
Record type	Sales Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the service case sla tracking process.
- **sales-return** ↗ - connected through the service case sla tracking process.

Commission Eligibility Flags Review Search 8

Source: `Saved-Searches/customsearch_demo_shipping_exception_alerts_008`

Commission Eligibility Flags Review Search 8 lists Bin records that need review for shipping exception alerts.

Purpose

This saved search shows Bin records that need attention for shipping exception alerts.

Criteria

CRITERION	VALUE
Record type	Bin
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the shipping exception alerts process.
- **bin** ↗ - connected through the shipping exception alerts process.

Commission Eligibility Flags Review Search 69

Source: `Saved-Searches/customsearch_demo_shipping_exception_alerts_069`

Commission Eligibility Flags Review Search 69 lists Inventory Item records that need review for shipping exception alerts.

Purpose

This saved search shows Inventory Item records that need attention for shipping exception alerts.

Criteria

CRITERION	VALUE
Record type	Inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the shipping exception alerts process.
- **inventory-item** ↗ - connected through the shipping exception alerts process.

Billing Schedule Monitor Review Search 130

Source: `Saved-Searches/customsearch_demo_shipping_exception_alerts_130`

Billing Schedule Monitor Review Search 130 lists Customer Deposit records that need review for shipping exception alerts.

Purpose

This saved search shows Customer Deposit records that need attention for shipping exception alerts.

Criteria

CRITERION	VALUE
Record type	Customer Deposit
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the shipping exception alerts process.
- **customer-deposit** ↗ - connected through the shipping exception alerts process.

Credit Hold Review Review Search 191

Source: `Saved-Searches/customsearch_demo_shipping_exception_alerts_191`

Credit Hold Review Review Search 191 lists Shipping Item records that need review for shipping exception alerts.

Purpose

This saved search shows Shipping Item records that need attention for shipping exception alerts.

Criteria

CRITERION	VALUE
Record type	Shipping Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the shipping exception alerts process.
- **shipping-item** ↗ - connected through the shipping exception alerts process.

Billing Schedule Monitor Review Search 252

Source: `Saved-Searches/customsearch_demo_shipping_exception_alerts_252`

Billing Schedule Monitor Review Search 252 lists Journal Entry records that need review for shipping exception alerts.

Purpose

This saved search shows Journal Entry records that need attention for shipping exception alerts.

Criteria

CRITERION	VALUE
Record type	Journal Entry
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the shipping exception alerts process.
- **journal-entry** ↗ - connected through the shipping exception alerts process.

Campaign Response Routing Review Search 313

Source: `Saved-Searches/customsearch_demo_shipping_exception_alerts_313`

Campaign Response Routing Review Search 313 lists Lot Numbered Item records that need review for shipping exception alerts.

Purpose

This saved search shows Lot Numbered Item records that need attention for shipping exception alerts.

Criteria

CRITERION	VALUE
Record type	Lot Numbered Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the shipping exception alerts process.
- **lot-numbered-item** ↗ - connected through the shipping exception alerts process.

Credit Hold Review Review Search 22

Source: `Saved-Searches/customsearch_demo_shipping_method_validation_022`

Credit Hold Review Review Search 22 lists Payment Method records that need review for shipping method validation.

Purpose

This saved search shows Payment Method records that need attention for shipping method validation.

Criteria

CRITERION	VALUE
Record type	Payment Method
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the shipping method validation process.
- **payment-method** ↗ - connected through the shipping method validation process.

Credit Hold Review Review Search 83

Source: `Saved-Searches/customsearch_demo_shipping_method_validation_083`

Credit Hold Review Review Search 83 lists Project records that need review for shipping method validation.

Purpose

This saved search shows Project records that need attention for shipping method validation.

Criteria

CRITERION	VALUE
Record type	Project
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the shipping method validation process.
- **project** ↗ - connected through the shipping method validation process.

Billing Schedule Monitor Review Search 144

Source: `Saved-Searches/customsearch_demo_shipping_method_validation_144`

Billing Schedule Monitor Review Search 144 lists Service Item records that need review for shipping method validation.

Purpose

This saved search shows Service Item records that need attention for shipping method validation.

Criteria

CRITERION	VALUE
Record type	Service Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Billing Schedule Monitor** ↗ - connected through the shipping method validation process.
- **service-item** ↗ - connected through the shipping method validation process.

Cash Sale Exception Review Review Search 205

Source: `Saved-Searches/customsearch_demo_shipping_method_validation_205`

Cash Sale Exception Review Review Search 205 lists Work Order records that need review for shipping method validation.

Purpose

This saved search shows Work Order records that need attention for shipping method validation.

Criteria

CRITERION	VALUE
Record type	Work Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the shipping method validation process.
- **work-order** ↗ - connected through the shipping method validation process.

Vendor Payment Release Review Search 266

Source: `Saved-Searches/customsearch_demo_shipping_method_validation_266`

Vendor Payment Release Review Search 266 lists Department records that need review for shipping method validation.

Purpose

This saved search shows Department records that need attention for shipping method validation.

Criteria

CRITERION	VALUE
Record type	Department
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the shipping method validation process.
- **department** ↗ - connected through the shipping method validation process.

Purchase Request Approval Review Search 57

Source: `Saved-Searches/customsearch_demo_support_case_routing_057`

Purchase Request Approval Review Search 57 lists Sales Order records that need review for support case routing.

Purpose

This saved search shows Sales Order records that need attention for support case routing.

Criteria

CRITERION	VALUE
Record type	Sales Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the support case routing process.
- **sales-order** ↗ - connected through the support case routing process.

Purchase Request Approval Review Search 118

Source: `Saved-Searches/customsearch_demo_support_case_routing_118`

Purchase Request Approval Review Search 118 lists Credit Memo records that need review for support case routing.

Purpose

This saved search shows Credit Memo records that need attention for support case routing.

Criteria

CRITERION	VALUE
Record type	Credit Memo
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the support case routing process.
- **credit-memo** ↗ - connected through the support case routing process.

Case Escalation Management Review Search 179

Source: `Saved-Searches/customsearch_demo_support_case_routing_179`

Case Escalation Management Review Search 179 lists Term records that need review for support case routing.

Purpose

This saved search shows Term records that need attention for support case routing.

Criteria

CRITERION	VALUE
Record type	Term
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the support case routing process.
- **term** ↗ - connected through the support case routing process.

Commission Eligibility Flags Review Search 240

Source: `Saved-Searches/customsearch_demo_support_case_routing_240`

Commission Eligibility Flags Review Search 240 lists Task records that need review for support case routing.

Purpose

This saved search shows Task records that need attention for support case routing.

Criteria

CRITERION	VALUE
Record type	Task
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the support case routing process.
- **task** ↗ - connected through the support case routing process.

Cash Sale Exception Review Review Search 301

Source: `Saved-Searches/customsearch_demo_support_case_routing_301`

Cash Sale Exception Review Review Search 301 lists Non-inventory Item records that need review for support case routing.

Purpose

This saved search shows Non-inventory Item records that need attention for support case routing.

Criteria

CRITERION	VALUE
Record type	Non-inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Cash Sale Exception Review** ↗ - connected through the support case routing process.
- **non-inventory-item** ↗ - connected through the support case routing process.

Pricing Review Process Review Search 61

Source: `Saved-Searches/customsearch_demo_support_intake_triage_061`

Pricing Review Process Review Search 61 lists Calendar Event records that need review for support intake triage.

Purpose

This saved search shows Calendar Event records that need attention for support intake triage.

Criteria

CRITERION	VALUE
Record type	Calendar Event
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the support intake triage process.
- **calendar-event** ↗ - connected through the support intake triage process.

Backorder Review Queue Review Search 122

Source: `Saved-Searches/customsearch_demo_support_intake_triage_122`

Backorder Review Queue Review Search 122 lists Assembly Item records that need review for support intake triage.

Purpose

This saved search shows Assembly Item records that need attention for support intake triage.

Criteria

CRITERION	VALUE
Record type	Assembly Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the support intake triage process.
- **assembly-item** ↗ - connected through the support intake triage process.

Backorder Review Queue Review Search 183

Source: `Saved-Searches/customsearch_demo_support_intake_triage_183`

Backorder Review Queue Review Search 183 lists Transfer Order records that need review for support intake triage.

Purpose

This saved search shows Transfer Order records that need attention for support intake triage.

Criteria

CRITERION	VALUE
Record type	Transfer Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the support intake triage process.
- **transfer-order** ↗ - connected through the support intake triage process.

Case Follow-up Reminder Review Search 244

Source: `Saved-Searches/customsearch_demo_support_intake_triage_244`

Case Follow-up Reminder Review Search 244 lists Price Level records that need review for support intake triage.

Purpose

This saved search shows Price Level records that need attention for support intake triage.

Criteria

CRITERION	VALUE
Record type	Price Level
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the support intake triage process.
- **price-level** ↗ - connected through the support intake triage process.

Purchase Request Approval Review Search 305

Source: `Saved-Searches/customsearch_demo_support_intake_triage_305`

Purchase Request Approval Review Search 305 lists Employee records that need review for support intake triage.

Purpose

This saved search shows Employee records that need attention for support intake triage.

Criteria

CRITERION	VALUE
Record type	Employee
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the support intake triage process.
- **employee** ↗ - connected through the support intake triage process.

Case Follow-up Reminder Review Search 25

Source: `Saved-Searches/customsearch_demo_tax_code_review_025`

Case Follow-up Reminder Review Search 25 lists Employee records that need review for tax code review.

Purpose

This saved search shows Employee records that need attention for tax code review.

Criteria

CRITERION	VALUE
Record type	Employee
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the tax code review process.
- **employee** ↗ - connected through the tax code review process.

Case Follow-up Reminder Review Search 86

Source: `Saved-Searches/customsearch_demo_tax_code_review_086`

Case Follow-up Reminder Review Search 86 lists Inventory Adjustment records that need review for tax code review.

Purpose

This saved search shows Inventory Adjustment records that need attention for tax code review.

Criteria

CRITERION	VALUE
Record type	Inventory Adjustment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the tax code review process.
- **inventory-adjustment** ↗ - connected through the tax code review process.

Commission Eligibility Flags Review Search 147

Source: `Saved-Searches/customsearch_demo_tax_code_review_147`

Commission Eligibility Flags Review Search 147 lists Customer records that need review for tax code review.

Purpose

This saved search shows Customer records that need attention for tax code review.

Criteria

CRITERION	VALUE
Record type	Customer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the tax code review process.
- **customer** ↗ - connected through the tax code review process.

Purchase Request Approval Review Search 208

Source: `Saved-Searches/customsearch_demo_tax_code_review_208`

Purchase Request Approval Review Search 208 lists Vendor Payment records that need review for tax code review.

Purpose

This saved search shows Vendor Payment records that need attention for tax code review.

Criteria

CRITERION	VALUE
Record type	Vendor Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the tax code review process.
- **vendor-payment** ↗ - connected through the tax code review process.

Campaign Response Routing Review Search 269

Source: `Saved-Searches/customsearch_demo_tax_code_review_269`

Campaign Response Routing Review Search 269 lists Account records that need review for tax code review.

Purpose

This saved search shows Account records that need attention for tax code review.

Criteria

CRITERION	VALUE
Record type	Account
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the tax code review process.
- **account** ↗ - connected through the tax code review process.

Backorder Review Queue Review Search 41

Source: `Saved-Searches/customsearch_demo_vendor_bill_exception_review_041`

Backorder Review Queue Review Search 41 lists Vendor Return records that need review for vendor bill exception review.

Purpose

This saved search shows Vendor Return records that need attention for vendor bill exception review.

Criteria

CRITERION	VALUE
Record type	Vendor Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the vendor bill exception review process.
- **vendor-return** ↗ - connected through the vendor bill exception review process.

Support Intake Triage Review Search 102

Source: `Saved-Searches/customsearch_demo_vendor_bill_exception_review_102`

Support Intake Triage Review Search 102 lists Purchase Order records that need review for vendor bill exception review.

Purpose

This saved search shows Purchase Order records that need attention for vendor bill exception review.

Criteria

CRITERION	VALUE
Record type	Purchase Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the vendor bill exception review process.
- **purchase-order** ↗ - connected through the vendor bill exception review process.

Case Follow-up Reminder Review Search 163

Source: `Saved-Searches/customsearch_demo_vendor_bill_exception_review_163`

Case Follow-up Reminder Review Search 163 lists Customer Payment records that need review for vendor bill exception review.

Purpose

This saved search shows Customer Payment records that need attention for vendor bill exception review.

Criteria

CRITERION	VALUE
Record type	Customer Payment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the vendor bill exception review process.
- **customer-payment** ↗ - connected through the vendor bill exception review process.

Credit Hold Review Review Search 224

Source: `Saved-Searches/customsearch_demo_vendor_bill_exception_review_224`

Credit Hold Review Review Search 224 lists Subsidiary records that need review for vendor bill exception review.

Purpose

This saved search shows Subsidiary records that need attention for vendor bill exception review.

Criteria

CRITERION	VALUE
Record type	Subsidiary
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the vendor bill exception review process.
- **subsidiary** ↗ - connected through the vendor bill exception review process.

Contract Renewal Alerts Review Search 285

Source: `Saved-Searches/customsearch_demo_vendor_bill_exception_review_285`

Contract Renewal Alerts Review Search 285 lists Calendar Event records that need review for vendor bill exception review.

Purpose

This saved search shows Calendar Event records that need attention for vendor bill exception review.

Criteria

CRITERION	VALUE
Record type	Calendar Event
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the vendor bill exception review process.
- **calendar-event** ↗ - connected through the vendor bill exception review process.

Pricing Review Process Review Search 7

Source: `Saved-Searches/customsearch_demo_vendor_compliance_checks_007`

Pricing Review Process Review Search 7 lists Item Receipt records that need review for vendor compliance checks.

Purpose

This saved search shows Item Receipt records that need attention for vendor compliance checks.

Criteria

CRITERION	VALUE
Record type	Item Receipt
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the vendor compliance checks process.
- **item-receipt** ↗ - connected through the vendor compliance checks process.

Pricing Review Process Review Search 68

Source: `Saved-Searches/customsearch_demo_vendor_compliance_checks_068`

Pricing Review Process Review Search 68 lists Sales Tax Item records that need review for vendor compliance checks.

Purpose

This saved search shows Sales Tax Item records that need attention for vendor compliance checks.

Criteria

CRITERION	VALUE
Record type	Sales Tax Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the vendor compliance checks process.
- **sales-tax-item** ↗ - connected through the vendor compliance checks process.

Case Escalation Management Review Search 129

Source: `Saved-Searches/customsearch_demo_vendor_compliance_checks_129`

Case Escalation Management Review Search 129 lists Cash Sale records that need review for vendor compliance checks.

Purpose

This saved search shows Cash Sale records that need attention for vendor compliance checks.

Criteria

CRITERION	VALUE
Record type	Cash Sale
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the vendor compliance checks process.
- **cash-sale** ↗ - connected through the vendor compliance checks process.

Case Escalation Management Review Search 190

Source: `Saved-Searches/customsearch_demo_vendor_compliance_checks_190`

Case Escalation Management Review Search 190 lists Payment Method records that need review for vendor compliance checks.

Purpose

This saved search shows Payment Method records that need attention for vendor compliance checks.

Criteria

CRITERION	VALUE
Record type	Payment Method
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Escalation Management** ↗ - connected through the vendor compliance checks process.
- **payment-method** ↗ - connected through the vendor compliance checks process.

Vendor Payment Release Review Search 251

Source: `Saved-Searches/customsearch_demo_vendor_compliance_checks_251`

Vendor Payment Release Review Search 251 lists Project records that need review for vendor compliance checks.

Purpose

This saved search shows Project records that need attention for vendor compliance checks.

Criteria

CRITERION	VALUE
Record type	Project
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the vendor compliance checks process.
- **project** ↗ - connected through the vendor compliance checks process.

Backorder Review Queue Review Search 312

Source: `Saved-Searches/customsearch_demo_vendor_compliance_checks_312`

Backorder Review Queue Review Search 312 lists Service Item records that need review for vendor compliance checks.

Purpose

This saved search shows Service Item records that need attention for vendor compliance checks.

Criteria

CRITERION	VALUE
Record type	Service Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Backorder Review Queue** ↗ - connected through the vendor compliance checks process.
- **service-item** ↗ - connected through the vendor compliance checks process.

Credit Hold Review Review Search 15

Source: `Saved-Searches/customsearch_demo_vendor_onboarding_review_015`

Credit Hold Review Review Search 15 lists Transfer Order records that need review for vendor onboarding review.

Purpose

This saved search shows Transfer Order records that need attention for vendor onboarding review.

Criteria

CRITERION	VALUE
Record type	Transfer Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Credit Hold Review** ↗ - connected through the vendor onboarding review process.
- **transfer-order** ↗ - connected through the vendor onboarding review process.

Contract Renewal Alerts Review Search 76

Source: `Saved-Searches/customsearch_demo_vendor_onboarding_review_076`

Contract Renewal Alerts Review Search 76 lists Price Level records that need review for vendor onboarding review.

Purpose

This saved search shows Price Level records that need attention for vendor onboarding review.

Criteria

CRITERION	VALUE
Record type	Price Level
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Contract Renewal Alerts** ↗ - connected through the vendor onboarding review process.
- **price-level** ↗ - connected through the vendor onboarding review process.

Commission Eligibility Flags Review Search 137

Source: `Saved-Searches/customsearch_demo_vendor_onboarding_review_137`

Commission Eligibility Flags Review Search 137 lists Employee records that need review for vendor onboarding review.

Purpose

This saved search shows Employee records that need attention for vendor onboarding review.

Criteria

CRITERION	VALUE
Record type	Employee
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the vendor onboarding review process.
- **employee** ↗ - connected through the vendor onboarding review process.

Vendor Payment Release Review Search 198

Source: `Saved-Searches/customsearch_demo_vendor_onboarding_review_198`

Vendor Payment Release Review Search 198 lists Inventory Adjustment records that need review for vendor onboarding review.

Purpose

This saved search shows Inventory Adjustment records that need attention for vendor onboarding review.

Criteria

CRITERION	VALUE
Record type	Inventory Adjustment
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Vendor Payment Release** ↗ - connected through the vendor onboarding review process.
- **inventory-adjustment** ↗ - connected through the vendor onboarding review process.

Case Follow-up Reminder Review Search 259

Source: `Saved-Searches/customsearch_demo_vendor_onboarding_review_259`

Case Follow-up Reminder Review Search 259 lists Customer records that need review for vendor onboarding review.

Purpose

This saved search shows Customer records that need attention for vendor onboarding review.

Criteria

CRITERION	VALUE
Record type	Customer
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the vendor onboarding review process.
- **customer** ↗ - connected through the vendor onboarding review process.

Support Intake Triage Review Search 56

Source: `Saved-Searches/customsearch_demo_vendor_payment_release_056`

Support Intake Triage Review Search 56 lists Subsidiary records that need review for vendor payment release.

Purpose

This saved search shows Subsidiary records that need attention for vendor payment release.

Criteria

CRITERION	VALUE
Record type	Subsidiary
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the vendor payment release process.
- **subsidiary** ↗ - connected through the vendor payment release process.

Campaign Response Routing Review Search 117

Source: `Saved-Searches/customsearch_demo_vendor_payment_release_117`

Campaign Response Routing Review Search 117 lists Calendar Event records that need review for vendor payment release.

Purpose

This saved search shows Calendar Event records that need attention for vendor payment release.

Criteria

CRITERION	VALUE
Record type	Calendar Event
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the vendor payment release process.
- **calendar-event** ↗ - connected through the vendor payment release process.

Purchase Request Approval Review Search 178

Source: `Saved-Searches/customsearch_demo_vendor_payment_release_178`

Purchase Request Approval Review Search 178 lists Assembly Item records that need review for vendor payment release.

Purpose

This saved search shows Assembly Item records that need attention for vendor payment release.

Criteria

CRITERION	VALUE
Record type	Assembly Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Purchase Request Approval** ↗ - connected through the vendor payment release process.
- **assembly-item** ↗ - connected through the vendor payment release process.

Commission Eligibility Flags Review Search 239

Source: `Saved-Searches/customsearch_demo_vendor_payment_release_239`

Commission Eligibility Flags Review Search 239 lists Transfer Order records that need review for vendor payment release.

Purpose

This saved search shows Transfer Order records that need attention for vendor payment release.

Criteria

CRITERION	VALUE
Record type	Transfer Order
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Commission Eligibility Flags** ↗ - connected through the vendor payment release process.
- **transfer-order** ↗ - connected through the vendor payment release process.

Case Follow-up Reminder Review Search 300

Source: `Saved-Searches/customsearch_demo_vendor_payment_release_300`

Case Follow-up Reminder Review Search 300 lists Price Level records that need review for vendor payment release.

Purpose

This saved search shows Price Level records that need attention for vendor payment release.

Criteria

CRITERION	VALUE
Record type	Price Level
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Case Follow-up Reminder** ↗ - connected through the vendor payment release process.
- **price-level** ↗ - connected through the vendor payment release process.

Campaign Response Routing Review Search 21

Source: `Saved-Searches/customsearch_demo_warehouse_transfer_controls_021`

Campaign Response Routing Review Search 21 lists Non-inventory Item records that need review for warehouse transfer controls.

Purpose

This saved search shows Non-inventory Item records that need attention for warehouse transfer controls.

Criteria

CRITERION	VALUE
Record type	Non-inventory Item
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the warehouse transfer controls process.
- **non-inventory-item** ↗ - connected through the warehouse transfer controls process.

Campaign Response Routing Review Search 82

Source: `Saved-Searches/customsearch_demo_warehouse_transfer_controls_082`

Campaign Response Routing Review Search 82 lists Assembly Build records that need review for warehouse transfer controls.

Purpose

This saved search shows Assembly Build records that need attention for warehouse transfer controls.

Criteria

CRITERION	VALUE
Record type	Assembly Build
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the warehouse transfer controls process.
- **assembly-build** ↗ - connected through the warehouse transfer controls process.

Campaign Response Routing Review Search 143

Source: `Saved-Searches/customsearch_demo_warehouse_transfer_controls_143`

Campaign Response Routing Review Search 143 lists Class records that need review for warehouse transfer controls.

Purpose

This saved search shows Class records that need attention for warehouse transfer controls.

Criteria

CRITERION	VALUE
Record type	Class
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Campaign Response Routing** ↗ - connected through the warehouse transfer controls process.
- **class** ↗ - connected through the warehouse transfer controls process.

Support Intake Triage Review Search 204

Source: `Saved-Searches/customsearch_demo_warehouse_transfer_controls_204`

Support Intake Triage Review Search 204 lists Support Case records that need review for warehouse transfer controls.

Purpose

This saved search shows Support Case records that need attention for warehouse transfer controls.

Criteria

CRITERION	VALUE
Record type	Support Case
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the warehouse transfer controls process.
- **support-case** ↗ - connected through the warehouse transfer controls process.

Support Intake Triage Review Search 265

Source: `Saved-Searches/customsearch_demo_warehouse_transfer_controls_265`

Support Intake Triage Review Search 265 lists Vendor Return records that need review for warehouse transfer controls.

Purpose

This saved search shows Vendor Return records that need attention for warehouse transfer controls.

Criteria

CRITERION	VALUE
Record type	Vendor Return
Status	Open or pending review
Inactive records	Excluded

Results

COLUMN	PURPOSE
Internal ID	Opens the source record
Status	Shows current process state
Owner	Shows who should review next
Last modified	Helps identify stale records

Operational notes

- Check criteria before using this search as an automation trigger.
- Keep result columns concise for daily review.

Related configuration

This object references:

- **Support Intake Triage** ↗ - connected through the warehouse transfer controls process.
- **vendor-return** ↗ - connected through the warehouse transfer controls process.

SECTION

Custom records

Custom record type definitions and related setup.

2 documents

Custom records contents

Custom record type definitions and related setup.

DOCUMENT	SOURCE
Approval Matrix ↗	`Custom-Records/customrecord_demo_approval_matrix`
Processing Queue ↗	`Custom-Records/customrecord_demo_processing_queue`

Approval Matrix

Source: `Custom-Records/customrecord_demo_approval_matrix`

Approval Matrix stores setup rows for order approval workflow.

Purpose

Use this custom record to maintain setup rows for order approval workflow. Each row controls how the automation should behave for a business scenario.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Name	Label for the setup row	User entry
Status	Whether the setup row is active	Controlled list
Owner	Person responsible for review	Employee reference

Behavior

AREA	SETTING
UI access	Available to administrators
System notes	Enabled
Attachments	Enabled

Operational notes

- Review setup rows after process ownership changes.
- Use system notes to confirm who changed a rule.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the order approval workflow process.
- **sales-order** ↗ - connected through the order approval workflow process.
- **vendor** ↗ - connected through the order approval workflow process.

Processing Queue

Source: `Custom-Records/customrecord_demo_processing_queue`

Processing Queue stores setup rows for invoice queue automation.

Purpose

Use this custom record to maintain setup rows for invoice queue automation. Each row controls how the automation should behave for a business scenario.

Key fields

FIELD	WHAT IT MEANS	WHERE THE VALUE COMES FROM
Name	Label for the setup row	User entry
Status	Whether the setup row is active	Controlled list
Owner	Person responsible for review	Employee reference

Behavior

AREA	SETTING
UI access	Available to administrators
System notes	Enabled
Attachments	Enabled

Operational notes

- Review setup rows after process ownership changes.
- Use system notes to confirm who changed a rule.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the invoice queue automation process.
- **purchase-order** ↗ - connected through the invoice queue automation process.
- **return-authorization** ↗ - connected through the invoice queue automation process.

SECTION

Custom lists

Custom list values and selection sources.

37 documents

Custom lists contents

Custom list values and selection sources.

DOCUMENT	SOURCE
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_backorder_review_queue_04
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_case_escalation_management_30
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_case_follow_up_reminder_25
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_cash_sale_exception_review_10
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_contract_renewal_alerts_20
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_credit_hold_review_03
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_customer_credit_recheck_31
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_customer_deposit_matching_12
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_customer_duplicate_review_21
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_demo_core_utilities_13
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_employee_approval_limits_29
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_expense_approval_routing_09
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_forecast_adjustment_review_22
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_inventory_count_reconciliation_06
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_inventory_reorder_alerts_26
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_invoice_delivery_preferences_33
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_item_fulfillment_controls_15
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_item_fulfillment_labeling_36
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_item_master_governance_32
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_order_approval_workflow_01
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_partner_referral_tracking_34
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_payment_application_review_18
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_pricing_review_process_14
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_project_billing_review_17
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_project_task_assignment_37
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_purchase_request_approval_27
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_quote_approval_matrix_08
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_quote_expiration_monitoring_16

DOCUMENT	SOURCE
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_revenue_recognition_review_07
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_sales_rep_assignment_rules_19
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_sales_tax_exception_review_23
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_serialized_item_compliance_24
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_shipping_method_validation_35
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_support_intake_triage_11
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_tax_code_review_05
Pricing Review Process Status List ↗	Custom-Lists/customlist_demo_vendor_bill_exception_review_28
Order Approval Workflow Status List ↗	Custom-Lists/customlist_demo_vendor_compliance_checks_02

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_backorder_review_queue_04`

Order Approval Workflow Status List defines the controlled values used by backorder review queue.

Purpose

Use this list to keep controlled values for backorder review queue. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the backorder review queue process.
- **account** ↗ - connected through the backorder review queue process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_case_escalation_management_30`

Order Approval Workflow Status List defines the controlled values used by case escalation management.

Purpose

Use this list to keep controlled values for case escalation management. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the case escalation management process.
- **account** ↗ - connected through the case escalation management process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_case_follow_up_reminder_25`

Order Approval Workflow Status List defines the controlled values used by case follow-up reminder.

Purpose

Use this list to keep controlled values for case follow-up reminder. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the case follow-up reminder process.
- **vendor** ↗ - connected through the case follow-up reminder process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_cash_sale_exception_review_10`

Order Approval Workflow Status List defines the controlled values used by cash sale exception review.

Purpose

Use this list to keep controlled values for cash sale exception review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the cash sale exception review process.
- **class** ↗ - connected through the cash sale exception review process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_contract_renewal_alerts_20`

Pricing Review Process Status List defines the controlled values used by contract renewal alerts.

Purpose

Use this list to keep controlled values for contract renewal alerts. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the contract renewal alerts process.
- **contact** ↗ - connected through the contract renewal alerts process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_credit_hold_review_03`

Order Approval Workflow Status List defines the controlled values used by credit hold review.

Purpose

Use this list to keep controlled values for credit hold review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the credit hold review process.
- **return-authorization** ↗ - connected through the credit hold review process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_customer_credit_recheck_31`

Pricing Review Process Status List defines the controlled values used by customer credit recheck.

Purpose

Use this list to keep controlled values for customer credit recheck. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the customer credit recheck process.
- **purchase-requisition** ↗ - connected through the customer credit recheck process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_customer_deposit_matching_12`

Pricing Review Process Status List defines the controlled values used by customer deposit matching.

Purpose

Use this list to keep controlled values for customer deposit matching. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the customer deposit matching process.
- **account** ↗ - connected through the customer deposit matching process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_customer_duplicate_review_21`

Pricing Review Process Status List defines the controlled values used by customer duplicate review.

Purpose

Use this list to keep controlled values for customer duplicate review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the customer duplicate review process.
- **price-level** ↗ - connected through the customer duplicate review process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_demo_core_utilities_13`

Order Approval Workflow Status List defines the controlled values used by demo core utilities.

Purpose

Use this list to keep controlled values for demo core utilities. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the demo core utilities process.
- **inventory-item** ↗ - connected through the demo core utilities process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_employee_approval_limits_29`

Order Approval Workflow Status List defines the controlled values used by employee approval limits.

Purpose

Use this list to keep controlled values for employee approval limits. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the employee approval limits process.
- **project** ↗ - connected through the employee approval limits process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_expense_approval_routing_09`

Order Approval Workflow Status List defines the controlled values used by expense approval routing.

Purpose

Use this list to keep controlled values for expense approval routing. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the expense approval routing process.
- **campaign** ↗ - connected through the expense approval routing process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_forecast_adjustment_review_22`

Order Approval Workflow Status List defines the controlled values used by forecast adjustment review.

Purpose

Use this list to keep controlled values for forecast adjustment review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the forecast adjustment review process.
- **sales-return** ↗ - connected through the forecast adjustment review process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_inventory_count_reconciliation_06`

Order Approval Workflow Status List defines the controlled values used by inventory count reconciliation.

Purpose

Use this list to keep controlled values for inventory count reconciliation. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the inventory count reconciliation process.
- **return-authorization** ↗ - connected through the inventory count reconciliation process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_inventory_reorder_alerts_26`

Order Approval Workflow Status List defines the controlled values used by inventory reorder alerts.

Purpose

Use this list to keep controlled values for inventory reorder alerts. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the inventory reorder alerts process.
- **cash-sale** ↗ - connected through the inventory reorder alerts process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_invoice_delivery_preferences_33`

Order Approval Workflow Status List defines the controlled values used by invoice delivery preferences.

Purpose

Use this list to keep controlled values for invoice delivery preferences. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the invoice delivery preferences process.
- **class** ↗ - connected through the invoice delivery preferences process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_item_fulfillment_controls_15`

Order Approval Workflow Status List defines the controlled values used by item fulfillment controls.

Purpose

Use this list to keep controlled values for item fulfillment controls. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the item fulfillment controls process.
- **estimate** ↗ - connected through the item fulfillment controls process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_item_fulfillment_labeling_36`

Pricing Review Process Status List defines the controlled values used by item fulfillment labeling.

Purpose

Use this list to keep controlled values for item fulfillment labeling. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the item fulfillment labeling process.
- **class** ↗ - connected through the item fulfillment labeling process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_item_master_governance_32`

Order Approval Workflow Status List defines the controlled values used by item master governance.

Purpose

Use this list to keep controlled values for item master governance. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the item master governance process.
- **return-authorization** ↗ - connected through the item master governance process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_order_approval_workflow_01`

Pricing Review Process Status List defines the controlled values used by order approval workflow.

Purpose

Use this list to keep controlled values for order approval workflow. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the order approval workflow process.
- **sales-order** ↗ - connected through the order approval workflow process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_partner_referral_tracking_34`

Order Approval Workflow Status List defines the controlled values used by partner referral tracking.

Purpose

Use this list to keep controlled values for partner referral tracking. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the partner referral tracking process.
- **cash-sale** ↗ - connected through the partner referral tracking process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_payment_application_review_18`

Order Approval Workflow Status List defines the controlled values used by payment application review.

Purpose

Use this list to keep controlled values for payment application review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the payment application review process.
- **vendor** ↗ - connected through the payment application review process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_pricing_review_process_14`

Order Approval Workflow Status List defines the controlled values used by pricing review process.

Purpose

Use this list to keep controlled values for pricing review process. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the pricing review process process.
- **sales-return** ↗ - connected through the pricing review process process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_project_billing_review_17`

Pricing Review Process Status List defines the controlled values used by project billing review.

Purpose

Use this list to keep controlled values for project billing review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the project billing review process.
- **task** ↗ - connected through the project billing review process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_project_task_assignment_37`

Order Approval Workflow Status List defines the controlled values used by project task assignment.

Purpose

Use this list to keep controlled values for project task assignment. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the project task assignment process.
- **customer** ↗ - connected through the project task assignment process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_purchase_request_approval_27`

Order Approval Workflow Status List defines the controlled values used by purchase request approval.

Purpose

Use this list to keep controlled values for purchase request approval. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the purchase request approval process.
- **employee** ↗ - connected through the purchase request approval process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_quote_approval_matrix_08`

Order Approval Workflow Status List defines the controlled values used by quote approval matrix.

Purpose

Use this list to keep controlled values for quote approval matrix. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the quote approval matrix process.
- **cash-sale** ↗ - connected through the quote approval matrix process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_quote_expiration_monitoring_16`

Order Approval Workflow Status List defines the controlled values used by quote expiration monitoring.

Purpose

Use this list to keep controlled values for quote expiration monitoring. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the quote expiration monitoring process.
- **assembly-item** ↗ - connected through the quote expiration monitoring process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_revenue_recognition_review_07`

Pricing Review Process Status List defines the controlled values used by revenue recognition review.

Purpose

Use this list to keep controlled values for revenue recognition review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the revenue recognition review process.
- **item-receipt** ↗ - connected through the revenue recognition review process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_sales_rep_assignment_rules_19`

Order Approval Workflow Status List defines the controlled values used by sales rep assignment rules.

Purpose

Use this list to keep controlled values for sales rep assignment rules. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the sales rep assignment rules process.
- **customer-deposit** ↗ - connected through the sales rep assignment rules process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_sales_tax_exception_review_23`

Order Approval Workflow Status List defines the controlled values used by sales tax exception review.

Purpose

Use this list to keep controlled values for sales tax exception review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the sales tax exception review process.
- **payment-method** ↗ - connected through the sales tax exception review process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_serialized_item_compliance_24`

Pricing Review Process Status List defines the controlled values used by serialized item compliance.

Purpose

Use this list to keep controlled values for serialized item compliance. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the serialized item compliance process.
- **assembly-item** ↗ - connected through the serialized item compliance process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_shipping_method_validation_35`

Order Approval Workflow Status List defines the controlled values used by shipping method validation.

Purpose

Use this list to keep controlled values for shipping method validation. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the shipping method validation process.
- **lot-numbered-item** ↗ - connected through the shipping method validation process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_support_intake_triage_11`

Order Approval Workflow Status List defines the controlled values used by support intake triage.

Purpose

Use this list to keep controlled values for support intake triage. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the support intake triage process.
- **term** ↗ - connected through the support intake triage process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_tax_code_review_05`

Pricing Review Process Status List defines the controlled values used by tax code review.

Purpose

Use this list to keep controlled values for tax code review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the tax code review process.
- **calendar-event** ↗ - connected through the tax code review process.

Pricing Review Process Status List

Source: `Custom-Lists/customlist_demo_vendor_bill_exception_review_28`

Pricing Review Process Status List defines the controlled values used by vendor bill exception review.

Purpose

Use this list to keep controlled values for vendor bill exception review. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the vendor bill exception review process.
- **class** ↗ - connected through the vendor bill exception review process.

Order Approval Workflow Status List

Source: `Custom-Lists/customlist_demo_vendor_compliance_checks_02`

Order Approval Workflow Status List defines the controlled values used by vendor compliance checks.

Purpose

Use this list to keep controlled values for vendor compliance checks. The list keeps reporting, approvals, and automation criteria aligned.

Values

VALUE	MEANING
Pending Review	Waiting for an approved user to review the record
Approved	The record can continue through the process
On Hold	The record requires correction before processing
Complete	The process is finished

Behavior

AREA	SETTING
Show inactive values	No
Used by fields	Yes
Used by searches	Yes

Operational notes

- Add new values only after confirming downstream workflows and reports.
- Avoid renaming values during an active reporting period.

Related configuration

This object references:

- **Order Approval Workflow** ↗ - connected through the vendor compliance checks process.
- **class** ↗ - connected through the vendor compliance checks process.

SECTION

Custom segments

Custom segment setup and classification structures.

2 documents

Custom segments contents

Custom segment setup and classification structures.

DOCUMENT	SOURCE
Demo Channel ↗	`Custom-Segments/cseg_demo_channel`
Demo Region ↗	`Custom-Segments/cseg_demo_region`

Demo Channel

Source: `Custom-Segments/cseg_demo_channel`

Demo Channel groups transactions and reports for return authorization processing.

Purpose

Use this segment to group records for return authorization processing reporting and review.

Behavior

AREA	SETTING
Applies to transactions	Yes
Available in reports	Yes
Filtering	Available in saved searches

Operational notes

- Keep segment values stable because they are commonly used in reports.
- Review role access before adding sensitive segment values.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the return authorization processing process.
- **vendor-bill** ↗ - connected through the return authorization processing process.
- **cash-sale** ↗ - connected through the return authorization processing process.

Demo Region

Source: `Custom-Segments/cseg_demo_region`

Demo Region groups transactions and reports for credit hold review.

Purpose

Use this segment to group records for credit hold review reporting and review.

Behavior

AREA	SETTING
Applies to transactions	Yes
Available in reports	Yes
Filtering	Available in saved searches

Operational notes

- Keep segment values stable because they are commonly used in reports.
- Review role access before adding sensitive segment values.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the credit hold review process.
- **return-authorization** ↗ - connected through the credit hold review process.
- **contact** ↗ - connected through the credit hold review process.

SECTION

Custom transaction types

Custom transaction type setup.

2 documents

Custom transaction types contents

Custom transaction type setup.

DOCUMENT	SOURCE
Demo Adjustment ↗	Custom-Transaction-Types/customtransaction_demo_adjustment
Demo Request ↗	Custom-Transaction-Types/customtransaction_demo_request

Demo Adjustment

Source: `Custom-Transaction-Types/customtransaction_demo_adjustment`

Demo Adjustment captures controlled transaction activity for tax code review.

Purpose

Use this transaction type to capture controlled activity for tax code review.

Behavior

AREA	SETTING
Numbering	Automatic
Posting behavior	Non-posting demo setup
Forms	Custom forms available

Operational notes

- Review transaction forms before adding required fields.
- Confirm approval routing before enabling broad user access.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the tax code review process.
- **calendar-event** ↗ - connected through the tax code review process.
- **sales-return** ↗ - connected through the tax code review process.

Demo Request

Source: `Custom-Transaction-Types/customtransaction_demo_request`

Demo Request captures controlled transaction activity for fulfillment hold automation.

Purpose

Use this transaction type to capture controlled activity for fulfillment hold automation.

Behavior

AREA	SETTING
Numbering	Automatic
Posting behavior	Non-posting demo setup
Forms	Custom forms available

Operational notes

- Review transaction forms before adding required fields.
- Confirm approval routing before enabling broad user access.

Related configuration

This object references:

- **Pricing Review Process** ↗ - connected through the fulfillment hold automation process.
- **phone-call** ↗ - connected through the fulfillment hold automation process.
- **class** ↗ - connected through the fulfillment hold automation process.