

Workflow to Add Default Price List

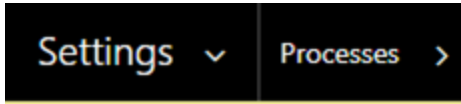
Issue:

Case-00067429 (K&R Plastics)

Topic-Workflow for the products adding default price list.

Solution:

First we have to go to the settings and click on Processes.



Then in 'My processes', click on New and create a process name-Products and add default price List.

A screenshot of the 'Process: Products adding Default Price List' configuration window. The window has a sidebar on the left with 'Common', 'Information', 'Audit History', 'Process Sessions', and 'Process Sessions'. The main area is divided into 'General', 'Administration', and 'Notes' tabs. The 'General' tab is active, showing fields for 'Process Name' (Products adding Default Price List), 'Activate As' (Process), 'Entry' (Product), and 'Category' (Workflow). There are checkboxes for 'Available to Run' (Run this workflow in the background, As an on-demand process, As a child process) and 'Workflow Job Retention' (Automatically delete completed workflow jobs). A 'Start when' section has checkboxes for 'Record is created', 'Record status changes', 'Record is assigned', 'Record fields change' (checked), and 'Record is deleted'. A 'Select' button is next to 'Record fields change'. At the bottom, there is a section for 'Add Step' with a dropdown menu showing 'Check if has default price list'. Below this, there is a condition 'If Product:Default Price List does not contain data, then:' followed by an 'Update Default Price List' step with an 'Update' dropdown set to 'Product' and a 'Set Properties' button.

Here we need to click on checkbox **[.] Run this workflow in the background** and checkbox **[.] As an on-demand process**.

When:Checkbox**[.] Records fields change**, click on select button and then click **select** default price list.

Click on Add Step>> name it- **Check if it has default price list**.

Then, select Insert step>> Click on checkbox**[.]After step**.

Then give the condition:

IF:Product:Default Price List does not contain data, then:

Update **Default Price List**

Update:**Product**

Then click on Set Properties. Then, a new window will open:

File Save and Close

Process: Products adding Default Price List
Update Product

SUMMARY

Name
Product ID
Parent
Valid From
Valid To
Description

Unit Group: Default Unit
Default Unit: Primary Unit
Default Price List
Decimals Supported
Stock Item: ☐ Yes ☐ No

Form Assistant

Dynamic Values
Dynamic Values
Operation: Set to
Look for: Product
Current Cost: \$
Add
Default value: \$
OK

Select the Unit group>>Default unit and, Default unit>>Primary unit respectively. Then Scroll down.

File Save and Close

Process: Products adding Default Price List
Update Product

Additional Fields

Current Cost: \$
COGS
QIDName
Product Type: Sales Inventory
Quantity On Hand
Standard Cost: \$
Stock Volume
Subject
Currency: US Dollar
Vendor

Is Kit: ☐ No ☐ Yes
Quickbooks Id
List Price: \$
URL
Size
Status
Stock Weight
Supplier Name
Vendor ID
Vendor Name

Form Assistant

Dynamic Values
Dynamic Values
Operation: Set to
Look for: Product
Current Cost: \$
Add
Default value: \$
OK

Add the values for the fields Current cost,list Price and Standard cost as Current cost.

Select Form assistant>>Dynamic values

Operator>>Set To

Look For>>Product

>>Current Cost

Default Value-\$

Secure | <https://krplastics.com/dynamics.com/SFA/Workflow/entityform.aspx?activityname=UpdateStep3IdentityFullName-productIdentityname-productmode=1&primaryentity=Product>

File Save and Close

Process: Products adding Default Price List
Update Product

Additional Fields

Current Cost	\$	Is Kit	<input type="radio"/> No <input type="radio"/> Yes
COGS		Quickbooks Id	
QbName		List Price	\$
Product Type	Sales Inventory	URL	
Quantity On Hand		Size	
Standard Cost	\$	Status	
Stock Volume		Stock Weight	
Subject		Supplier Name	
Currency	US Dollar	Vendor ID	
Vendor		Vendor Name	

Form Assistant

Dynamic Values

Dynamic Values

Operator: Set To

Look for: Product

Product Type

Add

Default value:

OK

Similarly for product type:

Form assistant>>Dynamic values

Operator>>SetTo

Look For>>Product

>>ProductType

Save it.The workflow will run in the background.