RMNSUG Meeting Minutes 9/16/2015 - Custom records

Membership News

Upcoming Meeting Topics

- November - Budgeting
- January Reporting and Saved Searches
- March: CRM Overview

Feature Presentation – Custom Records

RMNSUG Meeting Minutes 7/22/2015 Marketing
Membership News

Upcoming Meeting Topics

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Feature Presentation – Custom fields & Records Sam Stetler

- Simple database primer
  - Adding custom fields to custom records
  - Accessing custom records through links to other records and through menu selections
  - Saved search and custom records
  - Controlling access to custom records
  - Custom forms for custom records

- Adding custom fields
  - Customization-lists-records-fields
  - Different field types can be applied to different types of records
    - Entity
    - Item fields
    - Transaction body
    - Transaction column (line items)
    - Other custom fields (applied to things like classifications)

The main area on any record is called "Main"

Custom fields:

- When you add custom fields and want them to appear at the top area of the record, apply it to the "Main" subtab.
- Disabled vs. inline fields
  - Inline field display will allow you to create a link to another record or page that a user can click

    - Disabled just greys out the field
- Sourcing and filtering
    - If you have a list/record field type that uses a Record as the source, Sourcing and filtering will let you filter the selection of that field based on the source list (example: if I add a custom employee list field, I can add a filter so that my users can only select employees in the Denver location and hide all other employees)
- Best practice is to add field level help under the display tab
    - This will let users click to see the description of what the custom field I s for.

- Validation and defaulting allows you to set a default value for your custom field.

Custom Records:

- Use custom records to create a separate table of data that can be associated with existing data (example: a customer record can be attached to many custom contract records using a parent / child relationship)
- When creating a new custom record fill out the base information and save it before you are able to add fields. (the record has to exist in the system before custom fields can be attached to it.
- "include name" adds a primary ID field on the custom record.
- For permissions, select use permission list and add role permissions to the custom record. If you do not select "use permission list" it will ignore the permissions you have added.
- Optimistic locking - prevents two users from changing custom record data at the same time.
- Add a link for dfferent centers so that you can access your custom records through the main netsuite menus like Lists>Relationships
- If you have the drag and drop bundle installed, you can apply it to your custom records to store files.

TO create parent child relationships

- Add a list/record field to your custom record (customer for example)
- Check the "Record as parent box" This will let the customer be a parent to many custom records. And they can be accessible from the customer record. Make sure to select a parent subtab if you are setting a record as a parent to your custom record.
- You can import custom records via CSV
- When customizing user roles, you can give access to your custom records
- If you want to add permissions to an out of the box NetSuite role, you have to add the role on the custom record type

Printing custom records will only print the layout of the form.

- In Suiteflow, custom records are handled like an entity record. (not a transaction)