NetSuite Training

SuiteFlow Fundamentals

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Rocky Mountain NetSuite User Group

Instructor

Shaylee Olson

NetSuite Certified ERP Consultant

Eide Bailly, LLP

801.337.3718

sdolson@eidebailly.com

Course Objectives

By the end of the day, you should be able to:

- Default data on your forms
- Add field and form level validations during data entry
- Send email notifications
- Automate the creation of tasks, phone calls, etc.
- Transform a record
- Create approval routing processes
- Check the status of a workflow
- Debug a troubled workflow

- What else would **you** like be able to do?

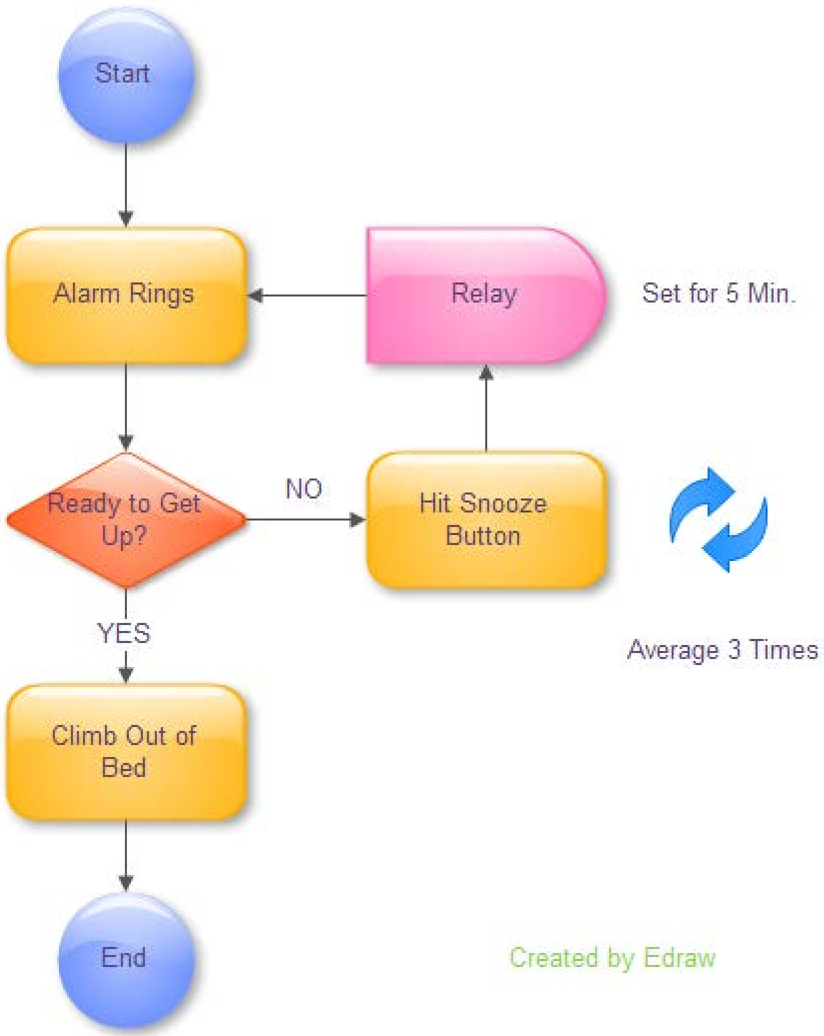
Morning Agenda

From		To	Topic
9:00 am	-	9:45 am	**Introduce SuiteFlow Elements** ▪ Basic Information ▪ Initiation Triggers ▪ Event Definitions ▪ Conditions
9:45 am	-	10:15 am	**Creating and Understanding Actions** ▪ Before record load actions ▪ User event actions ▪ Before/after record submit
10:15 am	-	10:30 am	**Break**
10:30 am	-	11:30 am	**Line Level Workflows** ▪ What are they, and how to use them?
11:30 am	-	12:00 pm	**Q&A**

What is SuiteFlow?

You use SuiteFlow to create and execute workflows in NetSuite. A workflow is the definition of a custom business process for a standard or custom record in NetSuite. Business processes can include transaction approval, lead nurturing, and record management. A workflow defines and automates the business process.

Wake Up!! A Workflow Example



SuiteFlow Elements

Base Record:

What record type is used by this business process?

States:

What stage is the business process in?

Actions:

What tasks are to be automated?

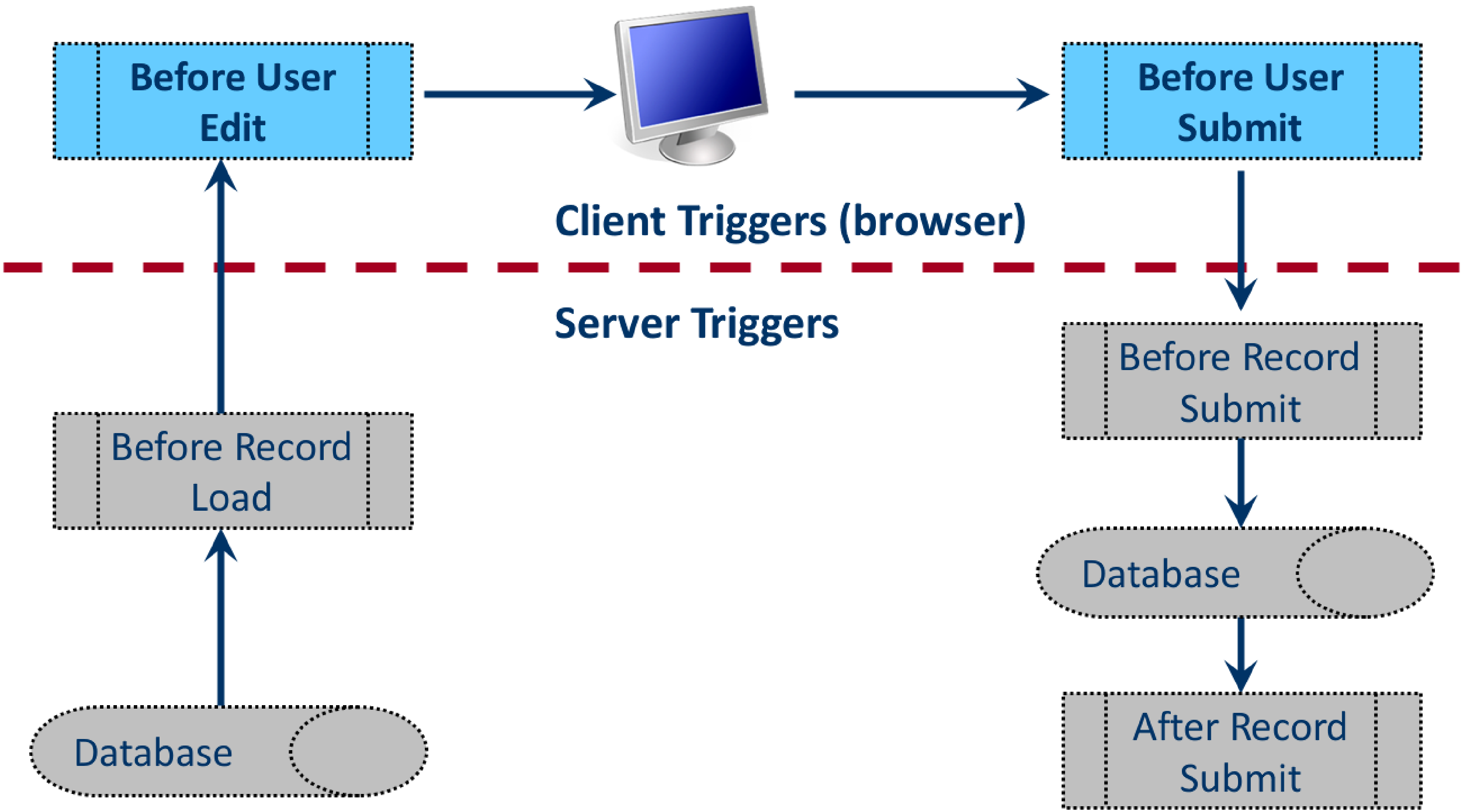
Transitions:

Where does the business process move to next?

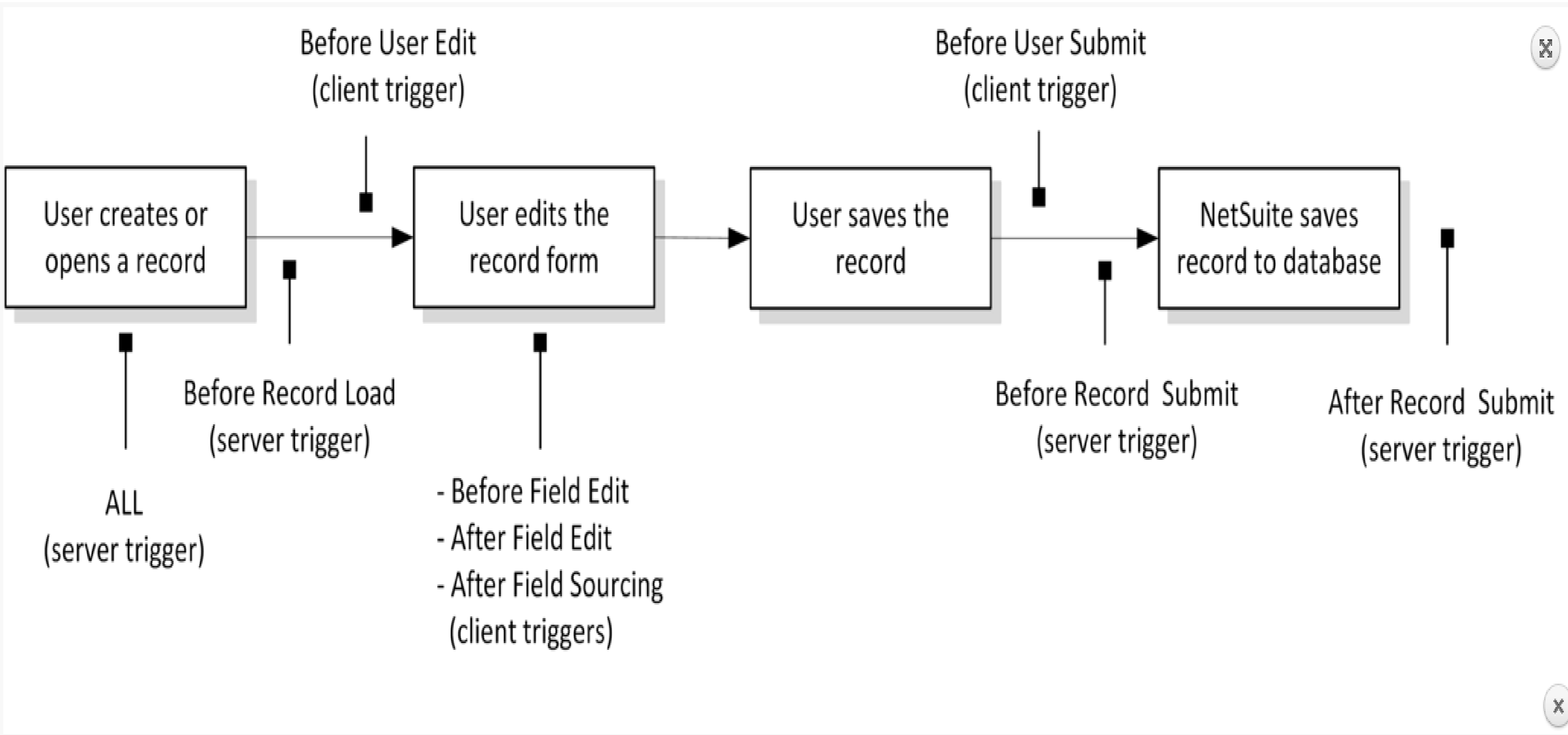
Triggers:

When to transition to the next state, or to take action?

Timing IS Everything!



Trigger Illustration



Client Triggers

Client Triggers Reference

Published 11/14/2014 04:17 AM | Updated 03/21/2016 02:16 AM | Answer Id: 40507

The following table describes the client triggers and their functionality. See Workflow Triggers and Client Triggers for general information about client triggers.

Trigger Name	Description
Before User Edit	Executes after a record form loads into the browser and before the user makes any changes to the form. See Before User Edit Trigger.
Before Field Edit	Executes before a user completes changes to a field on a record form. See Before Field Edit Trigger.
After Field Edit	Executes after a user completes changes to a field on a record form. See After Field Edit Trigger.
After Field Sourcing	Executes after all dependent field values on a record form have been populated. See After Field Sourcing Trigger.
Before User Submit	Executes after a user clicks **Save** on a record and before the Before Record Submit server trigger executes. See Before User Submit Trigger.

Server Triggers

Server **Triggers** Reference

Published 11/14/2014 04:19 AM | Updated 03/21/2016 02:15 AM | Answer Id: 40555

SuiteFlow (Workflow) ▸ SuiteFlow Reference and Examples ▸ Triggers Reference ▸ Server Triggers Reference

The following table describes the server triggers and their functionality. See Workflow Triggers and Server Triggers for general information about server triggers.

Trigger Type	Applies To	Description
Before Record Load	• Workflow initiation • Actions • Transitions	Executes before a record loads into the browser. See Before Record Load Trigger.
Before Record Submit	• Workflow initiation • Actions • Transitions	Executes after a user clicks **Save** on a record, but before NetSuite saves the data to the database. See Before User Submit Trigger.
After Record Submit	• Workflow initiation • Actions • Transitions	Executes after NetSuite saves the record data to the database. See After Record Submit Trigger.

Ready… ACTION!

Action	Result
Show Message	Show an informational message
Set Field Value	Load a field with a value
Set Field Mandatory	Set whether a field is required or not
Set Field Display Type	Set whether a field is editable or not
Set Field Display Label	Dynamically set a field’s label

Take 2! and... ACTION!

Action	Result
Add Button	Add a button to the form
Remove Button	Remove a button from the form
Lock Record	Lock the record from further changes
Confirm	Show a warning message
Return User Error	Show an error message
Send Email	Send a customized email message

Chain ReACTION!

Action	Result
Transform Record	Transform a transaction record into another transaction record type
Create Record	Creates a new record
Go To Record	Redirects a user to a specific record
Subscribe To Record	Allows for the tracking of changes made to the record created via the Create Record action

Break!

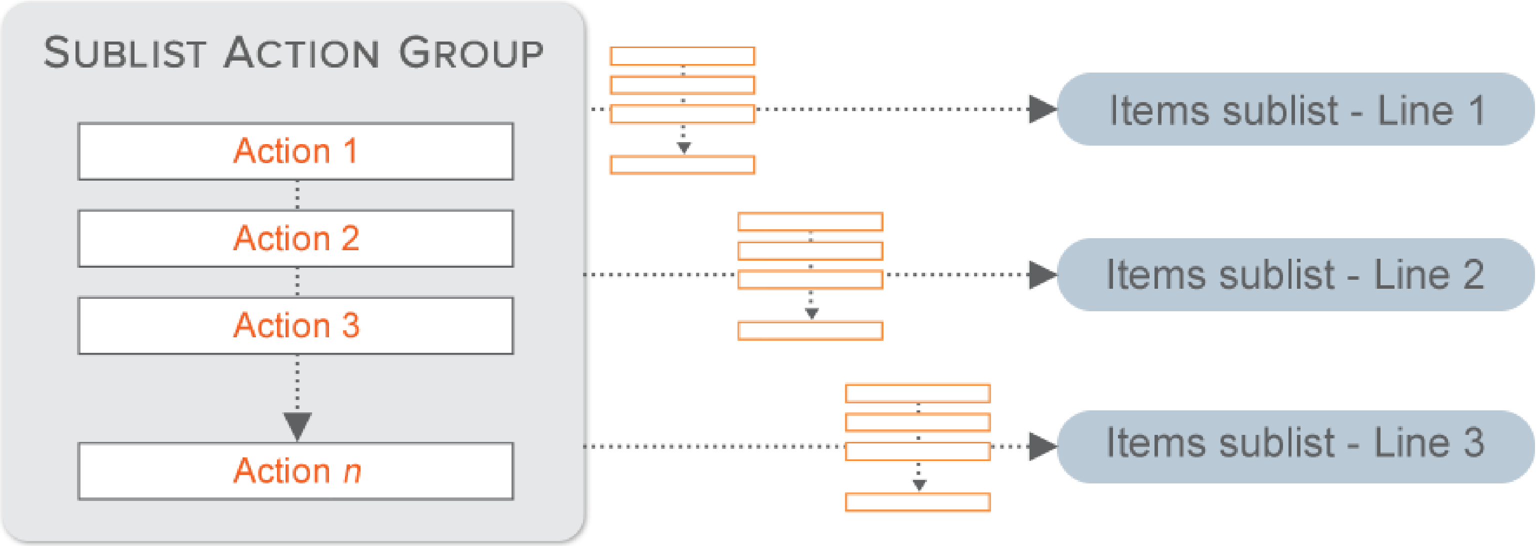
15 minute break

Line-Level Workflows

- Available on the "items" sublist (not expenses)
- You can impact header level fields, and line level fields based off the sublist criteria
- Must create a "sublist action group", then place an independent action in that group.
- Sublist fields can be used in formula within the workflow (I.e. {line.quantity})
- Only a subset of the sublist fields are available

How does it work?

The sublist action group, processes each line individually, by looping through the lines.



Sublist Action Groups process the ***Items*** *sublist line by line. As long as the group* *<u>and</u>* *action's conditions have been met, the actions will be executed on each sublist line.*

What is the availability?

Available triggers

- Server Triggers
  - Before user submit
  - After user submit
  - NOT before record load
  - Scheduled
  - On entry
  - On exit
- Client Triggers
  - No client triggers available

Available Transactions

- Estimates
- Sales Orders
- Invoice
- Cash Sales
- Returns & Credits
- Purchase Orders
- Vendor Bills
- More…..

What actions can be performed?

- **Available now**
  - Create Record
  - Set field value
- **Coming in 2018.2**
  - Send Email
  - Return User Error
- **Special action note**
  - If you use a condition, the condition must be met for both the action group AND the individual action for the execution to occur

Questions?

Shaylee Olson

sdolson@eidebailly.com

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