



Rocky Mountain NetSuite User Group

Custom Fields and Records

What we will cover today:

- **Simple database primer, including one-to-many record types.**
- **Adding custom fields to NetSuite.**
- **Properties and attributes for the custom fields you create.**
- **Why use custom records at all, why not just add custom fields?**
- **Examples of data you might want to create custom records to capture.**
- **Creating custom records in NetSuite.**



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Custom Fields and Records

What we will cover today (2):

- **Adding custom fields to custom records.**
- **Accessing custom records through links to other records and through menu selections.**
- **Saved searches and custom records.**
- **Controlling access to custom records.**
- **Custom forms for custom records.**
- **Printing custom records.**
- **Adding behavior to custom records through workflows and scripting.**
- **We will be pausing throughout to answer questions**

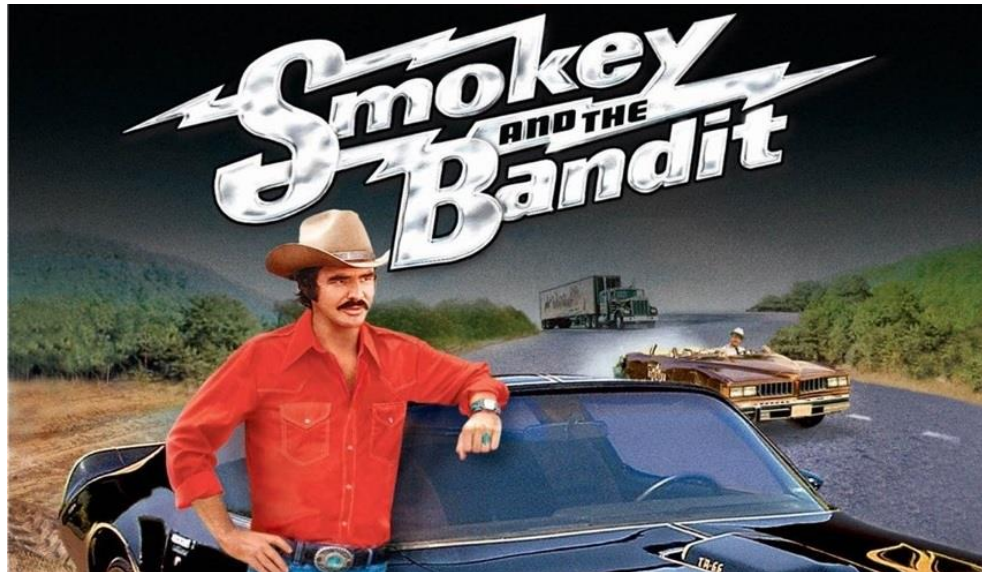


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Custom Fields and Records

We're in Smokey and the Bandit territory now:

**“We’ve got a long way to go short time to get there”,
so lets get started.**





Simple Database Primer

- In the broadest sense anyplace or file you store data is by definition a database.
- Relational databases (which is where all the data in NetSuite is stored) have some special powers, including the ability to define relationships between records.

	A	B	C
1	Name	Email Address	Address
2	Mickey Mouse	mickey@mouse.com	1234 Disneyland Dr.
3	Donald Duck	donald@duck.com	777 Disney World Way.
4	Scooby Doo	scoobydoo@mysteryinc.com	666 Haunted Ln.

	A	B	C	D	E
1	Name	Email Address	Address1	Address2	Address3
2	Mickey Mouse	mickey@mouse.com	1234 Disneyland Dr.	555 Paris Lane	777 Disney World Way.
3	Donald Duck	donald@duck.com	777 Disney World Way.	1234 Disneyland Dr.	
4	Scooby Doo	scoobydoo@mysteryinc.com	666 Haunted Ln.		

Simple Database Primer

- In this example, table 1's column UniqueID can be said to have a one-to-many relationship to table 2's column Character UniqueID.

	A	B	C
1	UniqueID	Name	Email Address
2	1	Mickey Mouse	mickey@mouse.com
3	2	Donald Duck	donald@duck.com
4	3	Scooby Doo	scoobydoo@mysteryinc.com

Table 1

	A	B	C
1	Character UniqueID	Address	Is Primary
2	1	1234 Disneyland Dr.	Yes
3	1	555 Paris Lane	
4	1	777 Disney World Way.	
5	2	777 Disney World Way.	Yes
6	2	1234 Disneyland Dr.	
7	3	666 Haunted Ln.	Yes

Table 2



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Adding Custom Fields to NetSuite

- **Customization → Lists, Records & Fields → Field Type (Entity Fields for Example) → New.**
- **Entity Fields (Leads, Customers, Vendors, etc.)**
- **Item Fields (Items, Services, Other Charges, etc.)**
- **CRM Fields (Support Cases, Projects, Tasks, etc.)**
- **Transaction Body Fields (Purchases, Sales, Transfers, etc.)**
- **Transaction Column Fields (Purchases, Sales, Transfers, etc. but all at the line item level).**
- **Item Number Fields (Inventory Records)**
- **Other Custom Fields (Custom Records)**



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Adding Custom Fields to NetSuite

- **Once you are on the add custom field form you will need to provide basic information (Label, ID, Description, etc.)**
- **Type: What type of data you want to store in the record.**
- **Applies To: What record types the field will apply to.**
- **Display: Where you want the field to show up, and how it should display.**



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Adding Custom Fields to NetSuite

- **Validation & Defaulting:** If there are default values that should be populated.
- **Sourcing & Filtering:** Allows you to trim down the options that are shown in lists.
- **Access:** One of the locations where you can control access to the record's data. There are also options to control access based on roles.
- **Now let's add a few fields to the customer record.**



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Enough Talk

Lets add a few custom fields



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Why Use Custom Records?

- **Going back to both our previous field example of a customer contract and looking at the example of relational databases from earlier, it is easy to see that some data would be better structured using a relationship.**
- **Custom behavior can be assigned to custom records using scripts and/or workflows making custom records more valuable**
- **Custom Records can be tied to existing records with parent/child (one-to-many) relationships, but can also live on their own making the data independent.**



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Custom Record Examples

- **In just a moment we are going to build a contract tracking custom record, however prior to doing that here are a few other examples of data you could capture using custom records:**
 - **A restaurant could have custom records for each of their menu items or recipes, and could relate that to how much of each food was used in making that recipes**
 - **A custom record could be setup to track a process flow, linking each of the steps in a business process together and making sure that all the steps were followed**
 - **Custom records could be used to keep track of fixed assets inside a company and who was responsible for those assets**
 - **A university could use custom records to keep track of students and their selected courses and schedules**



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Adding Custom Records to NetSuite

- **Customization → Lists, Records & Fields → Record Types → New**
- **Unlike custom fields there is only one type of custom record (aside from custom transactions which we will not be covering).**
- **Provide a Name and ID for your custom record at a minimum, though I would also highly recommend providing a Description.**
- **You can setup other things about the record, but I recommend saving early to avoid losing any customizations and because there are certain fields you cannot get to until you save the custom record**



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Adding Custom Records to NetSuite

- **Once you save your new custom record you are generally dropped right in the record itself.**
- **Take a look at the header level items, they are mostly self explanatory but there are a lot there. I have found the most important settings to be:**
 - **Include In Global Search** which allows the record to show in the Global Search in NetSuite
 - **Allow Quick Search** which places the record in the Quick Search Portlet on your dashboard
 - **Include Name Field**, provides a default field on the custom record
 - **Show ID**, which shows the record number for the record on the record
 - **Access Type**, controls how access to the record is controlled



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Custom Fields for Custom Records

- **Numbering** allows you to set how numbering will be done and a prefix and suffix for the record type, I recommend doing this.
- **Forms:** You can create your own custom forms the same as you could for native NetSuite records and this can act as a form of access control.
- **Permissions:** You can use this to set permissions for your custom record, but I recommend against this. I would use the roles page instead.
- **Links:** Allows you to place the custom record in your menu structure. This is critical when defining records that are not linked to NetSuite native records.



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Custom Fields for Custom Records

- **Once you have the custom record setup you will want to add fields to it. This works similarly to adding custom fields to native NetSuite records.**
- **Parent Records are what allow you to link your custom record to other records, custom or native NetSuite.**
- **Parent Records must be declared on the custom field.**
- **Child records are defined when creating the custom record by declaring another record as a parent.**



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Enough Talk

Lets Build Some Custom Records



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Searching for Custom Records

- **Custom records can be searched for the same as pretty much any other record.**
 - **Reports → Saved Searches → All Saved Searches → New**
 - **You should have a search type with the same name as the record type.**
- **There is no difference between searches for custom records and searches for native records.**
- **Mass Updates can be performed on custom records as well.**
 - **Lists → Mass Update → Mass Updates**
 - **General Updates → Custom Records**



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Controlling Custom Record Access

- **I recommend controlling access to custom records through the roles page.**
 - **Setup → Users/Roles → Manage Roles**
 - **Select the Role and click Edit to the left of it.**
 - **Permissions → Custom Record**
- **Only custom roles can be edited this way, for native roles you need to assign the permissions on the custom record.**
- **Permissions are cumulative and the highest permission is what the user has.**



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Printing Custom Records

- **There is not a lot of support for printing of custom records, but there are a few things you can do.**
- **The records will print natively, however the way they print may not be what you want.**
- **My understanding is that you can use scripting to create PDF and HTML printouts for your custom records, but that is beyond the scope of what we have time to cover.**



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Custom Record Workflows

- **Workflows work similarly with custom records as they do with Native NetSuite records.**
 - Customization → Scripting → Workflows → New
- **Give your workflow a name, an ID and select the custom record type from the drop down.**
- **Custom records in workflows act the same as entity records (as opposed to transactions).**



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Scripting Custom Record Workflows

- **Scripting custom records works the same as any other entity records in NetSuite.**
- **The few API calls I have used (nlapiGetFieldValue, nlapiGetFieldText, nlapiSetFieldValue and nlapiSetFieldText) have all worked.**
 - **Basic getter and setter functions or methods**
- **NetSuite help provides some good info about scripting.**
 - **Click Help in the upper right hand corner of your NetSuite window (Help, not Support)**
 - **SuiteCloud → SuiteScript (browse through the documentation from here)**
- **SuiteScript is far beyond a 2 hour session, and a programming background is recommended.**