

Sourcing in NetSuite

Retrieving Data from Related Records

What is Sourcing?

- Capability on Custom Fields to retrieve and display data from any related records
- Field values can be sourced from:
 - Fields of the same type on related records
 - Saved Search results with summary of same type
- On your Custom Field definition, use the “Sourcing and Validation” tab
 - “Source List” is the field that links to record you will be sourcing data from
 - “Source From” is the field on the linked record that should be retrieved

Impact of Store Value

- The “Store Value” setting on your custom field definition has significant impact on the behavior of sourcing
- “Store Value” enabled:
 - Sourcing only occurs when the record is initially created, then the link is broken
 - Subsequent updates to the original field will not be reflected in any sourced fields
- “Store Value” disabled:
 - Value of the original field is retrieved dynamically every time the record is loaded

Limitations

- Sourcing cannot be done on custom column fields in sublists
- Sourcing cannot be applied on native NetSuite fields

Presenter Info

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