Cory's Potpourri Topics

- Saved Search Conditions for workflow triggers and transitions
- Mass Updates
- CSV Import Overview

Saved Search Conditions

- The saved search must be of the same record type as the workflow record type
  - For example, you can not use a saved search for an item with a workflow for transactions
- Uses
  - Trigger a workflow to kick-off
    - Use in conjunction with "On Create" or "On View or Update"
  - Trigger a transition
    - Gives you a lot more control over the search parameters
    - Allows you to use the familiar interface of saved searches
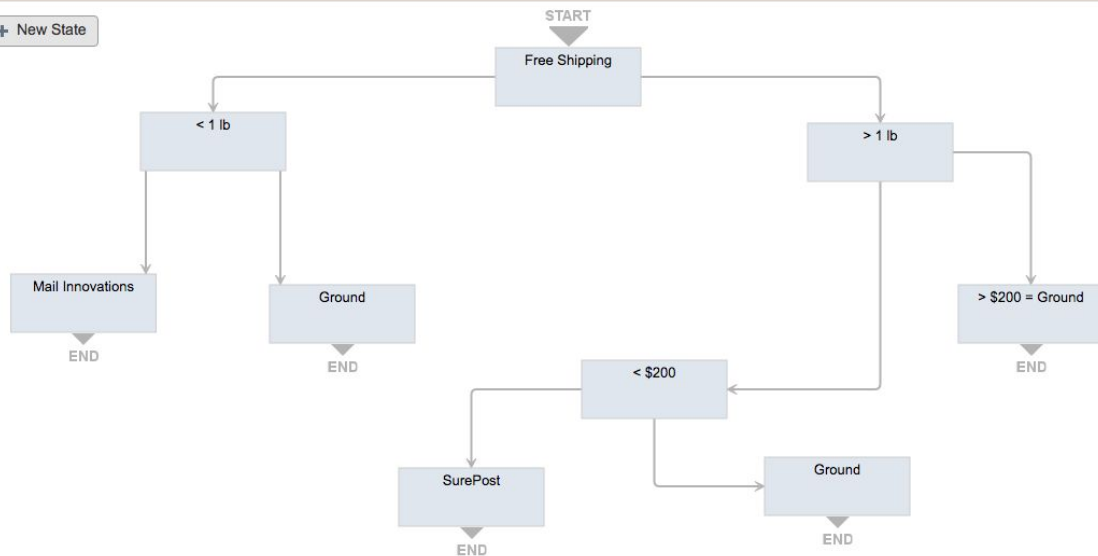- Allows you to use formulas in the saved search results that then can be used as summary criteria

Workflow to determine the least expensive shipping method

Workflow setup screen

This is the setup for the Workflow. Notice that the workflow will be triggered based on the Saved Search Condition.

This is the criteria of the saved search that triggers a record to enter the workflow.

Ship Method - Free Shipping

Save & Run | Reset | Cancel | Preview | Change ID | Actions ▾

* SEARCH TITLE	Ship Method - Free Shipping	
ID	customsearch1258	
OWNER	E102 Cory S Anderson	
PUBLIC	☐	
AVAILABLE AS LIST VIEW	☐	

AVAILABLE AS DASHBOARD VIEW ☐
AVAILABLE AS SUBLIST VIEW ☐
AVAILABLE FOR REMINDERS ☐
SHOW IN MENU ☐

Criteria | Results | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS ☑

Standard • | Summary

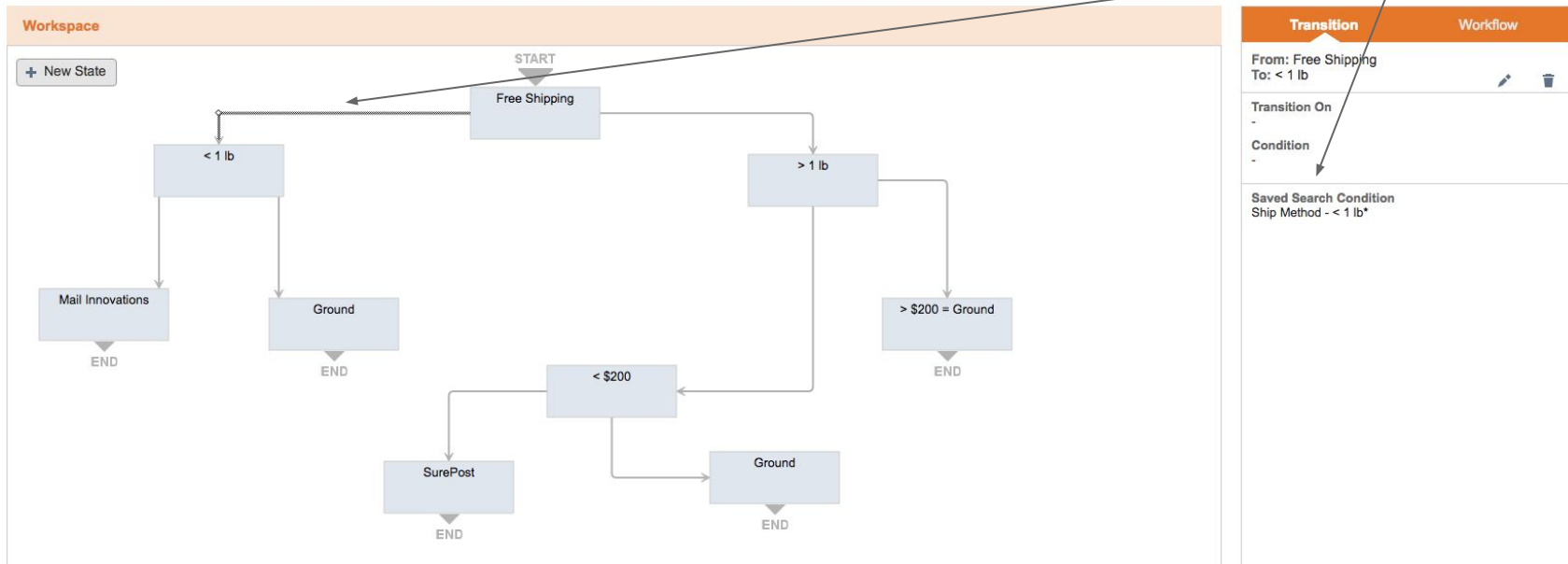| NOT	PARENS	FILTER*	DESCRIPTION*	FORMULA	PARENS	AND/OR
		Status	is Sales Order:Pending Fulfillment			And
		Date	is on or after today			And
		Account	is Sales			And
		Shipping Country	is United States			And
	(	ChannelAdvisor Shipping Cost (Custom Body)	is 0.00			Or
		ChannelAdvisor Shipping Cost (Custom Body)	is empty		)	And
		Ship Via	is not Local Pickup in Colorado only			And
	(	Shipping City	is not APO			Or
		Shipping City	is not FPO		)	And
		Ship Via	is none of Amazon Merchants - Prime Expedited, Amazon Merchants - Prime FreeEconomy, Amazon Merchants - Prime NextDay, Amazon Merchants - Prime SameDay, Amazon Merchants - Prime Scheduled, Amazon Merchants - Prime SecondDay, Amazon Merchants - Prime Standard, Amazon Merchants@ - Expedited, Amazon Merchants@ - NextDay, Amazon Merchants@ - SecondDay, Amazon Merchants@ - Standard			

☐ | | |

✔ Add | ✗ Cancel | Insert | Remove

Save & Run ▾ | Reset | Cancel | Preview | Change ID | Actions ▾

Each transition trigger can be defined separately based on a unique Saved search.

Here you can see that the transition from "Free Shipping" state to "< 1 lb" state is triggered based on the Saved Search Condition "Ship Method - < 1lb*" .

This is the criteria for the saved search that triggers the transition. This Search uses the Criteria > Summary tab to filter on the results of the search.
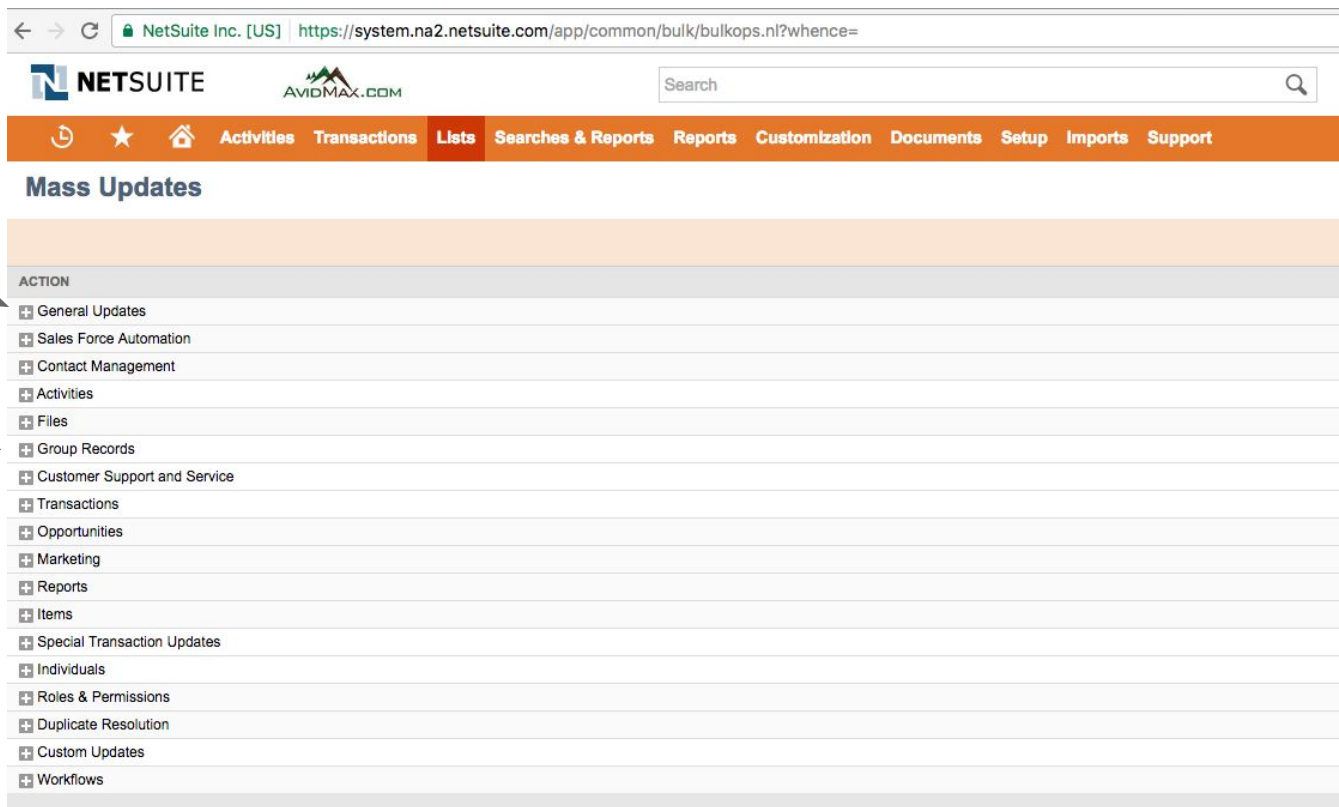
Mass Updates

- Allows you to update a bunch of records at the same time with the same edit criteria
- Works for most record types
- Use saved search type criteria to isolate the records you want to modify/update
- Can modify custom fields as well as some pre-defined fields from NS
- Can schedule Mass Updates to be run on a regular basis

Most Mass Updates you can start from the General Updates tab.

Expand General Updates and choose the record type you want to act on.

Other pre-configured mass updates can be accessed through the other sections.

On the Criteria tab, set the criteria for the records to change just like a saved search.

Results Tab

On the results tab, define the results you want to see as a preview before executing the mass update.

These don't do anything for the mass update other than let you see the records that will be affected based on your Criteria.

Mass Update Fields tab

Here you define the changes that the mass update will perform.
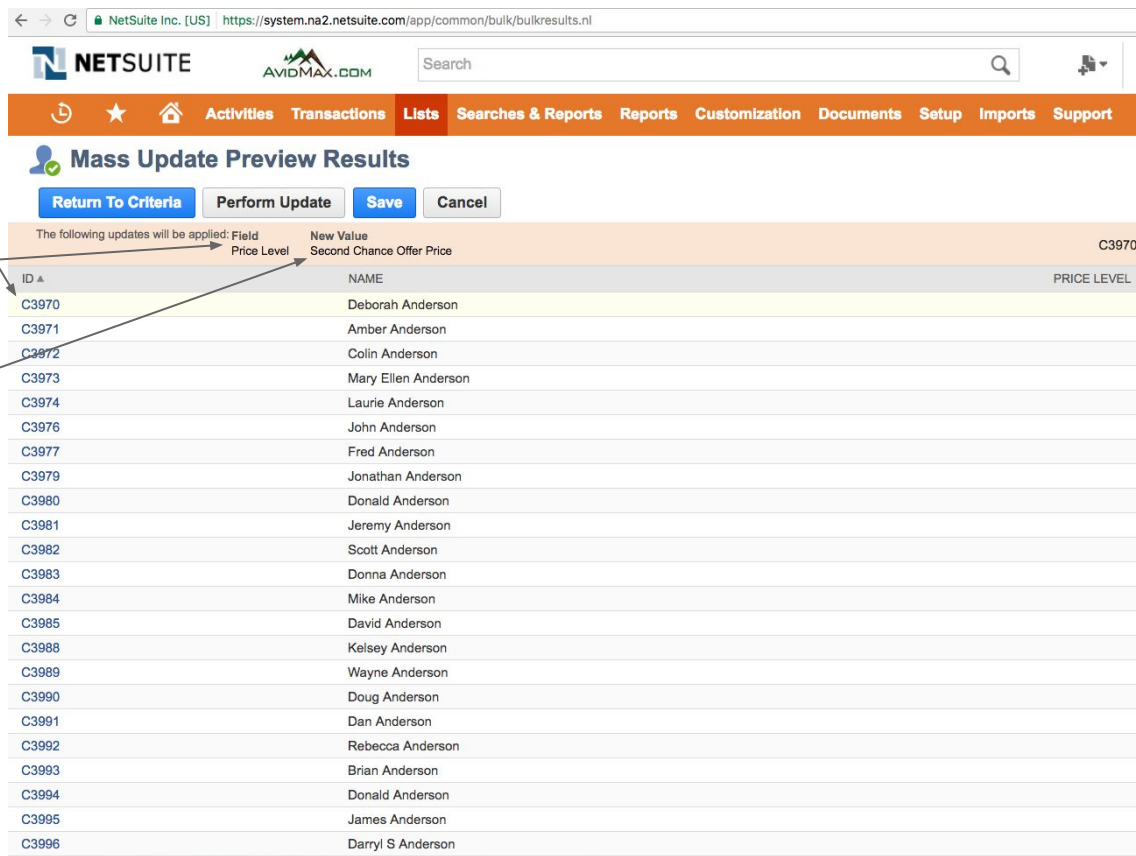
- Check the box
- Set the criteria

Preview the Mass Update for final review.

- Preview the records that will be affected
- Review the field that will be changed
- Review the New Value of the field to be changed
- Click Perform Update when everything looks good to go

CSV Import Overview

- Properly formatted file is standard CSV
- You usually have to use the Internal ID of a record to upload an edit or addition to it
    - and then you have to make sure you tell NS you are using the internal ID
- Netsuite does not like "blank" rows or headers in the CSV file
- Also, watch for leading or trailing spaces with Internal/External IDs - NS does not like those
- Saved CSV imports
    - Useful to avoid having to re-map regularly used imports
        - Great for bringing data in from other systems without having to alter the original file
        - See the mapping under "Saved CSV Imports"

CSV Import Overview

- Single file vs multiple file
  - Single file is used mostly for non-sublist type data
  - Multiple file options are mostly used for sublist type data such as Kit/Package components
    - Kit/Package components
    - Bin locations
    - Employee information such as addresses, direct deposit info etc . .
- Error messages
  - Usually related to a mismatch to the internal (or external) id
  - Could be you are trying to create a record instead of update one
  - Some errors are not helpful such as "Ambiguity error on logical key multi-match"

CSV Import Overview

- Overwrite missing fields
  - this is how you "delete" data from a field
- Overwrite sublists
  - Clears out all sublist data and replaces it with the uploaded data
- Mapping fields
  - Internal IDs sometimes have to be set as internal id on the mapping page
- Save and Run or
- Hover and Run

CSV Import Overview

Choose import type, record type, and file on the first page.

If you need a multiple file upload, choose that here.

CSV Import Overview

Overwrite Missing Fields if you want to delete data for blank cells in your file.

Overwrite Sublists if you want to delete and replace sublist data such as customer addresses, item bin locations etc . . .

CSV Import Overview

Map your fields here. Your file headers show up on the left.

NetSuite show on the right.

CSV Import Overview

If you want to create a saved CSV import, put a name in and hit Save and Run.

Otherwise, hover and run.