

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

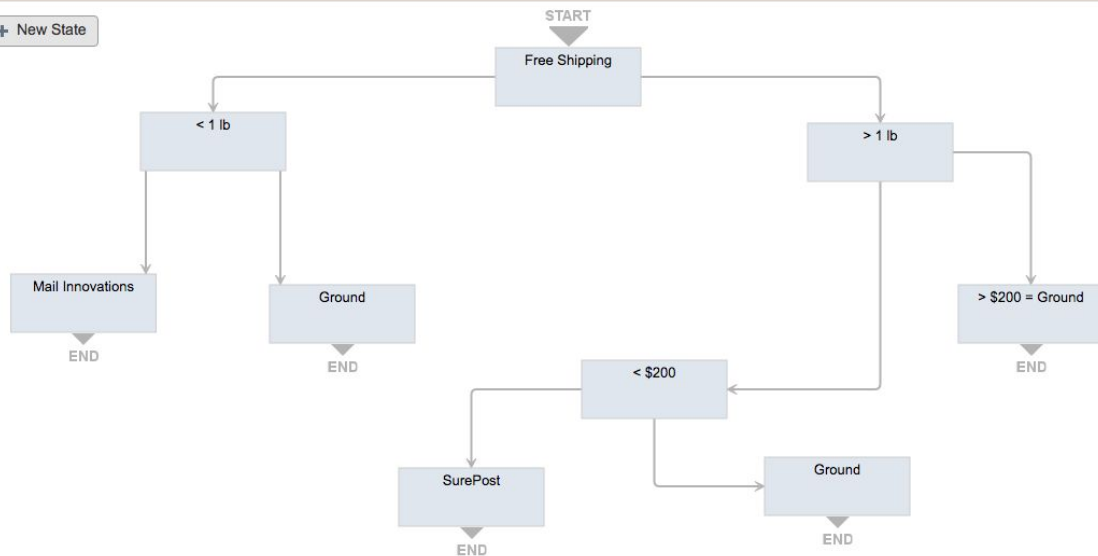
Workflow to determine the least expensive shipping method

Workflow: Ship Method - Free Shipping

List More...

Workspace

+ New State



Workflow

Workflow: Ship Method - Free Shipping

Summary Fields (0)

Record Type
Transaction (Sales Order)

Description
-

Inactive
No

Release Status
Released

Initiation
Event Based

Events
On Create

Trigger Type
After Record Submit

Workflow setup screen

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

Workflow

Save

Cancel

Change ID

Actions

Basic Information

* NAME

Ship Method - Free Shipping

DESCRIPTION

SCRIPT ID

customworkflow206_3

RECORD TYPE

Transaction

OWNER

E102 Cory S Anderson

* SUB TYPES

Bin Transfer

Bin Worksheet

Cash Refund

Cash Sale

Check

EXECUTE AS ADMIN

☒

RELEASE STATUS

Released

ENABLE LOGGING

☐

INACTIVE

☐

Initiation

EVENT BASED

☒

SCHEDULED

☐

Event Definition

ON CREATE

☒

ON VIEW OR UPDATE

☐

TRIGGER TYPE

After Record Submit

USE

CUSTOM FORMULA

☐

VISUAL BUILDER

☒

EVENT TYPES

Approve

Cancel

Create

Direct List Edit

CONDITION

CONTEXTS

CSV Import

Custom Mass Update

Offline Client

Portlet

SAVED SEARCH CONDITION

Ship Method - Free Shipping

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



NETSUITE

AVIDMAX.COM

se: ship method <1

Help

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AvidMax - Administrator

ActivitiesTransactionsListsSearches & ReportsReportsCustomizationDocumentsSetupImportsSupport

Ship Method - Free Shipping

Save & RunResetCancelPreviewChange IDActions

* SEARCH TITLEShip Method - Free Shipping

IDcustomsearch1258

OWNERE102 Cory S Anderson

PUBLIC

AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW

AVAILABLE AS SUBLIST VIEW

AVAILABLE FOR REMINDERS

SHOW IN MENU

CriteriaResultsHighlightingAvailable FiltersAudienceRolesEmailAudit TrailExecution Log

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

USE EXPRESSIONS

StandardSummary

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			

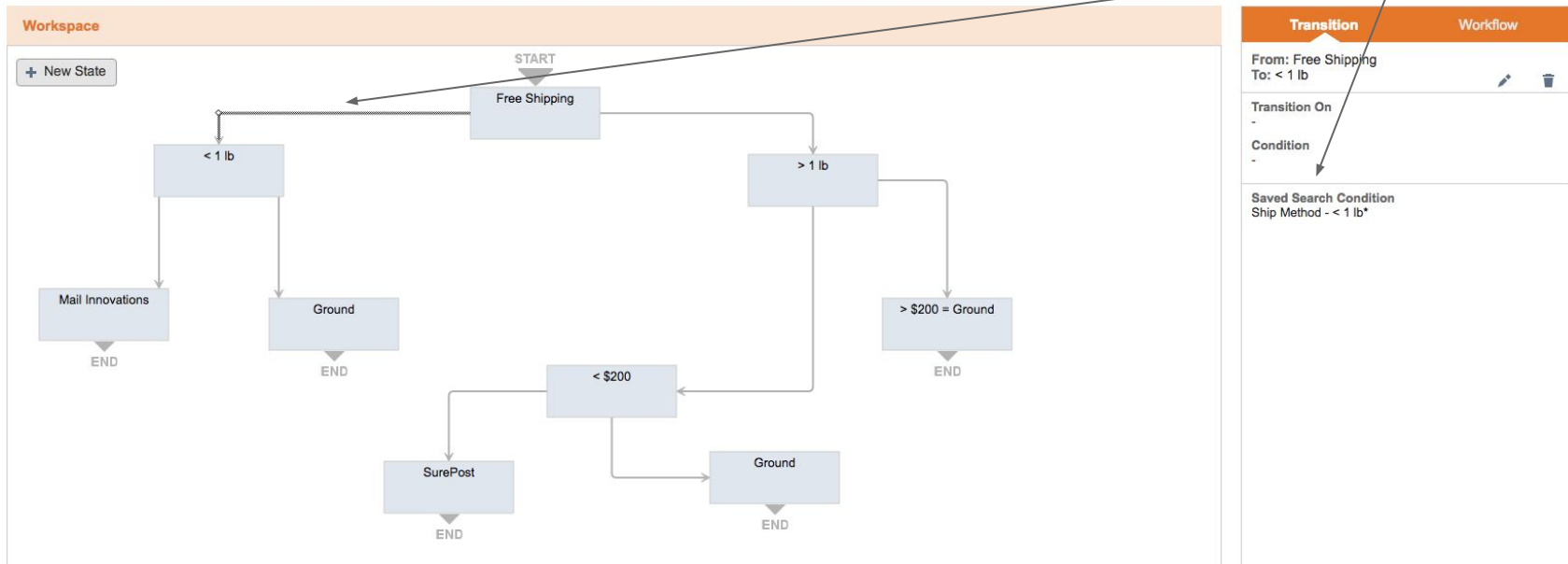
AddCancelInsertRemove

Save & RunResetCancelPreviewChange IDActions

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*”.

Workflow: Ship Method - Free Shipping



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.



NETSUITE

AVIDMAX.COM

Search

HelpE102 Cory S AndersonAvidMax - Administrator

ActivitiesTransactionsListsSearches & ReportsReportsCustomizationDocumentsSetupImportsSupport

Ship Method - < 1 lb*

Save & RunResetCancelPreviewChange IDActions

* SEARCH TITLEShip Method - < 1 lb*

IDcustomsearch1252

OWNERE102 Cory S Anderson

PUBLIC

AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW

AVAILABLE AS SUBLIST VIEW

AVAILABLE FOR REMINDERS

SHOW IN MENU

CriteriaResultsHighlightingAvailable FiltersAudienceRolesEmailAudit TrailExecution Log

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BYDateDESCENDING

THEN BYDESCENDING

THEN BYDESCENDING

OUTPUT TYPENormal

SHOW TOTALS

RUN UNRESTRICTED

MAX RESULTS

DISALLOW DRILL DOWN

MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields •

Remove AllAdd Multiple

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	SUMMARY LABEL
*						
Document Number	Group					
Account						
Item						
Item Weight (Custom Column)						
Formula (Numeric)	Sum		{custcol_itemweight} * {quantity}			

AddX Cancel+ InsertRemoveMove UpMove DownMove To TopMove To Bottom

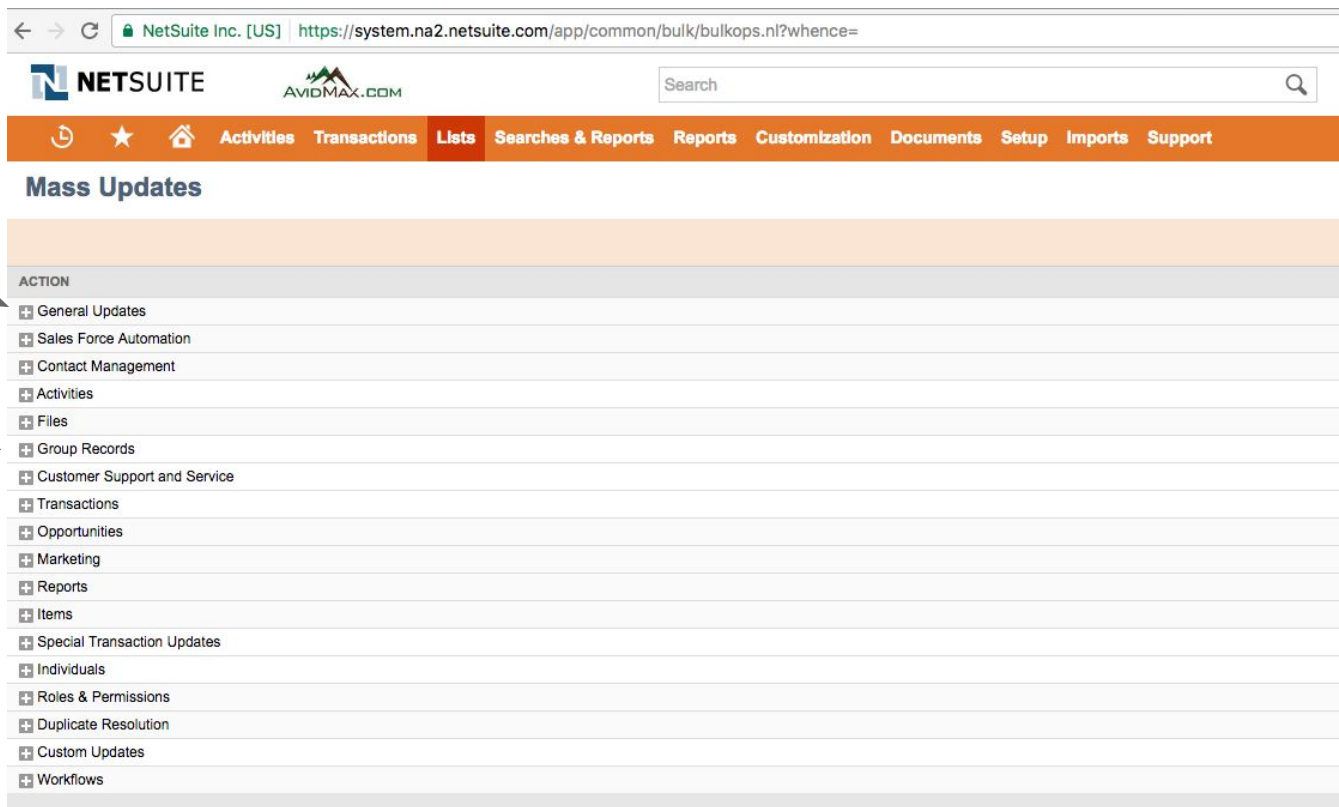
Mass Updates

- 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.

A screenshot of the Netsuite web application interface. The browser address bar shows the URL: https://system.na2.netsuite.com/app/common/bulk/bulkops.nl?whence=. The Netsuite logo and AVIDMAX.COM are in the top left. A search bar is in the top right. Below the navigation bar, the "Mass Updates" section is active. It contains a list of mass update options, each with a plus icon in a square. The options are: General Updates, Sales Force Automation, Contact Management, Activities, Files, Group Records, Customer Support and Service, Transactions, Opportunities, Marketing, Reports, Items, Special Transaction Updates, Individuals, Roles & Permissions, Duplicate Resolution, Custom Updates, and Workflows. Arrows from the text on the left point to the "General Updates" option and the "Roles & Permissions" option.

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



← → ↻ NetSuite Inc. [US] https://system.na2.netsuite.com/app/common/bulk/bulkop.nl?searchtype=Customer&opcode=GENERAL&_entryformparams=

NETSUITE **AVIDMAX.COM** Search

Activities Transactions **Lists** Searches & Reports Reports Customization Documents Setup Imports Support

Mass Update

Save Cancel Reset Preview

* TITLE OF ACTION Custom Customer Mass Update

TYPE Customer

Criteria Results Audience Schedule Audit Trail Mass Update Fields

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

USE EXPRESSIONS ☐

FILTER *	DESCRIPTION *
Last Name	contains anderson
<input type="text"/>	

✓ Add ✕ Cancel + Insert Remove

Save Cancel Reset Preview

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.



← → ↻ NetSuite Inc. [US] https://system.na2.netsuite.com/app/common/bulk/bulkop.nl?reload=T

NETSUITE **AVIDMAX.COM** Search

Activities Transactions **Lists** Searches & Reports Reports Customization Documents Setup Imports Support

Mass Update

Save **Cancel** **Reset** **Preview**

* TITLE OF ACTION Custom Customer Mass Update

TYPE Customer

Criteria	Results	Audience	Schedule	Audit Trail	Mass Update Fields
Use this tab to indicate columns to be included in the search results as well as sort order.					
SORT BY		ID	DESCENDING	<input type="checkbox"/>	OUTPUT TYPE
THEN BY			DESCENDING	<input type="checkbox"/>	SHOW TOTALS
THEN BY			DESCENDING	<input type="checkbox"/>	RUN UNRESTRICTED
					MAX RESULTS

Remove All **Add Multiple**

FIELD *	CUSTOM LABEL
ID	
Name	
Price Level	

✓ Add **✕ Cancel** **+ Insert** **Remove** **Move Up** **Move Down** **Move To Top** **Move To Bottom**

Save **Cancel** **Reset** **Preview**

Mass Update Fields tab



Here you define the changes that the mass update will perform.

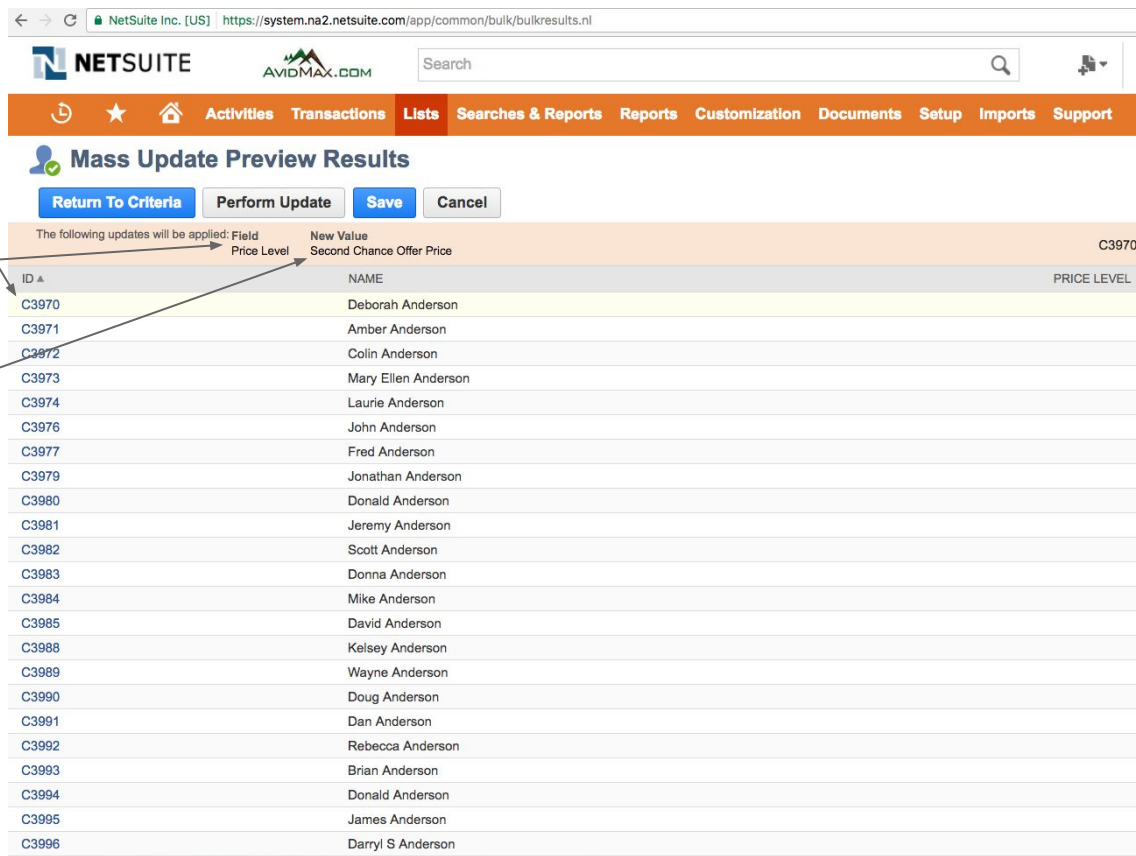
- Check the box
- Set the criteria

The screenshot shows the "Mass Update Fields" tab in the Netsuite interface. The top navigation bar includes "NETSUITE", "AVIDMAX.COM", and a search bar. Below this is a menu bar with tabs: "Activities", "Transactions", "Lists", "Searches & Reports", "Reports", "Customization", and "Documents". The "Lists" tab is active. On the left, a list of fields is shown with checkboxes. The "Price Level" checkbox is checked. To the right of the fields list, a dropdown menu is open for the "Price Level" field, showing a list of options: "Base Price", "Buy-It-Now Price", "ChannelAdvisor Store Price", "Reserve Price", "Retail Price", "Second Chance Offer Price" (which is highlighted), and "Starting Price".

Field	Value
Start Date	
End Date	
Mr./Ms...	
Terms	
Ship Complete	
Global Subscription Status	Soft Opt-Out
Taxable	
Tax Code	<Type then tab>
Resale Number	
Credit Limit	
<input checked="" type="checkbox"/> Price Level	Second Chance Offer Price
Account	
Partner	
Territory	
Comments	
Shipping Item	
Reminder Days	
URL	
Home Phone	
Mobile Phone	
Email Preference	Default
Email	
Print	
Fax	

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



NetSuite Inc. [US] https://system.na2.netsuite.com/app/common/bulk/bulkresults.nl

NETSUITE AVIDMAX.COM Search

Activities Transactions Lists Searches & Reports Reports Customization Documents Setup Imports Support

Mass Update Preview Results

Return To Criteria Perform Update Save Cancel

The following updates will be applied: Field Price Level New Value Second Chance Offer Price C3970

ID ▲	NAME	PRICE LEVEL
C3970	Deborah Anderson	
C3971	Amber Anderson	
C3972	Colin Anderson	
C3973	Mary Ellen Anderson	
C3974	Laurie Anderson	
C3976	John Anderson	
C3977	Fred Anderson	
C3979	Jonathan Anderson	
C3980	Donald Anderson	
C3981	Jeremy Anderson	
C3982	Scott Anderson	
C3983	Donna Anderson	
C3984	Mike Anderson	
C3985	David Anderson	
C3988	Kelsey Anderson	
C3989	Wayne Anderson	
C3990	Doug Anderson	
C3991	Dan Anderson	
C3992	Rebecca Anderson	
C3993	Brian Anderson	
C3994	Donald Anderson	
C3995	James Anderson	
C3996	Darryl S Anderson	

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.

The screenshot shows the "Import Assistant" window in the AVIDMAX software. The top navigation bar is orange and contains icons for a clock, star, and home, followed by menu items: Activities, Transactions, Lists, Searches & Reports, Reports, Customization, Documents, Setup, Imports, and Support. The "Imports" menu item is highlighted. The main content area is titled "Import Assistant" and has a sub-header "Scan & Upload CSV File". On the left, a "STEPS" sidebar lists five steps: 1 Scan & Upload CSV File (highlighted), 2 Import Options, 3 File Mapping, 4 Field Mapping, and 5 Save mapping & Start Import. The main area contains several configuration options: "IMPORT TYPE" is set to "Relationships" with a help icon; "RECORD TYPE" is set to "Customers Only" with a dropdown arrow; "CHARACTER ENCODING" is set to "Western (Windows 1252)" with a dropdown arrow; "CSV COLUMN DELIMITER" is set to "Comma" with a dropdown arrow. Below these, there is a section for "CSV File(s)" with two radio button options: "ONE FILE TO UPLOAD" (selected) and "MULTIPLE FILES TO UPLOAD". An arrow points from the text "choose that here." to the "MULTIPLE FILES TO UPLOAD" option. Below the radio buttons, there is a "Select..." button, a file icon followed by the text "Customer data.csv", and a "REMOVE" button. At the bottom right, there are three buttons: "Cancel", "< Back", and "Next >".

STEPS

- 1 Scan & Upload CSV File
- 2 Import Options
- 3 File Mapping
- 4 Field Mapping
- 5 Save mapping & Start Import

Scan & Upload CSV File

IMPORT TYPE Relationships

Choose the category of data to import.

RECORD TYPE Customers Only

Choose the record type of data to import.

CHARACTER ENCODING Western (Windows 1252)

Choose another character encoding format if you use an international or Macintosh version of Microsoft Excel, or if you typically use special characters.

CSV COLUMN DELIMITER Comma

Select the symbol to be used as a column separator in the CSV files you import. This setting overrides the column separator preference specified at Home > Set Preferences.

CSV File(s)

ONE FILE TO UPLOAD

MULTIPLE FILES TO UPLOAD

Choose whether to import data from a single file or multiple files, and click the Select button(s) to browse to the file(s) to be uploaded.

Select...

Customer data.csv

REMOVE

Cancel < Back Next >

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 ...

The screenshot shows the NetSuite web interface with the 'Import Assistant' wizard. The 'Import Options' step is selected in the left sidebar. The main content area is divided into 'Data Handling' and 'Advanced Options' sections. In the 'Data Handling' section, 'ADD OR UPDATE' is selected. In the 'Advanced Options' section, 'OVERWRITE MISSING FIELDS' is unchecked, 'VALIDATE MANDATORY CUSTOM FIELDS' is checked, 'OVERWRITE SUBLISTS' is unchecked, and 'IGNORE READ-ONLY FIELDS' is checked. On the right, there are settings for 'CUSTOM MULTI-SELECT VALUE DELIMITER' (set to '|'), 'CSV DECIMAL DELIMITER' (set to 'Period'), and 'CUSTOM FORM' (set to 'AMX Customer Form'). At the bottom right are 'Cancel', '< Back', and 'Next >' buttons. Arrows from the text on the left point to the 'OVERWRITE MISSING FIELDS' and 'OVERWRITE SUBLISTS' options in the interface.

NETSUITE **AVIDMAX.COM** Search

Activities Transactions Lists Searches & Reports Reports Customization Documents **Setup** Imports Support

Import Assistant More

STEPS

- 1 Scan & Upload CSV File
- 2 Import Options**
- 3 File Mapping
- 4 Field Mapping
- 5 Save mapping & Start Import

Import Options

Data Handling

ADD ☐

UPDATE ☒

ADD OR UPDATE ☐

Select the appropriate option depending on whether you are importing new data or updating existing data.

Advanced Options

LOG SYSTEM NOTES FOR CUSTOM FIELDS ☐

Enable this option to create system notes during import of custom field data. Impacts performance; recommended only when custom fields require an audit trail.

OVERWRITE MISSING FIELDS ☐

For updates, enable this option to clear NetSuite fields mapped to CSV file fields that do not contain data.

VALIDATE MANDATORY CUSTOM FIELDS ☒

Enable this option to require mandatory custom field data to be present for records to be created.

OVERWRITE SUBLISTS ☐

For updates, enable this option to cause imported sublist data to completely replace existing sublist data, instead of selectively updating or being appended. ... [more](#)

IGNORE READ-ONLY FIELDS ☒

CUSTOM MULTI-SELECT VALUE DELIMITER

Enter a single character to be used as a custom delimiter for multi-select fields, instead of the pipe (|).

CSV DECIMAL DELIMITER

Select the symbol to be used as a decimal mark in the CSV files you import. This setting overrides the decimal mark preference specified at Home > Set Preferences.

CUSTOM FORM

By default, your preferred form determines NetSuite fields that can be mapped for importing. To vary these fields, select a different form.

Cancel < Back Next >

CSV Import Overview



Map your
fields here.

Your file
headers show
up on the left.

NetSuite show
on the right.

Import Assistant

STEPS

- 1 Scan & Upload CSV File
- 2 Import Options
- 3 File Mapping
- 4 Field Mapping**
- 5 Save mapping & Start Import

Field Mapping

Your Fields

Customer data.csv

- Internal id
- First name
- last name
- shipping address line 1
- shipping address line 2
- Shipping City
- Shipping state
- Shipping zip
- phone number
- email address**

First name	↔	Customer : First Name	✕
Internal id	↔	Customer : Internal ID	✕
last name	↔	Customer : Last Name	✕
shipping address line 1	↔	Customer Address 1 : Address 1	✕
shipping address line 2	↔	Customer Address 1 : Address 2	✕
Shipping City	↔	Customer Address 1 : City	✕
Shipping state	↔	Customer Address 1 : State	✕
Shipping zip	↔	Customer Address 1 : Zip	✕
phone number	↔	Customer : Phone	✕
email address	↔	Customer : Email	✕
	↔		✕

Get help with creating Field Mapping

NetSuite Fields

Phone

- Photo Gear
- Photography
- Pref. CC Processor
- Price Level
- Primary Contact
- Print on Check As
- Promotional Ineligible
- Received Welcome Series
- Recency
- Reminder Days
- Resale Number
- Sales Readiness
- Sales Rep
- Send Transactions Via Email

Reset Cancel < Back Next >

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.

The screenshot shows the Netsuite Import Assistant interface. At the top is the Netsuite header with the logo, AVIDMAX.COM, a search bar, and user information for E102 Cory S. Anderson. Below the header is an orange navigation bar with tabs: Activities, Transactions, Lists, Searches & Reports, Reports, Customization, Documents, Setup, Imports, and Support. The 'Imports' tab is active, showing the 'Import Assistant' page. On the left, a 'STEPS' sidebar lists five steps: 1 Scan & Upload CSV File, 2 Import Options, 3 File Mapping, 4 Field Mapping, and 5 Save mapping & Start Import. Step 5 is highlighted. The main content area is titled 'Save mapping & Start Import' and contains instructions: 'Your CSV files are ready to be imported into your NetSuite account. You can save your Field Mapping to be used again later (optional). To work with a saved import, go to the "saved Imports" page under the Setup > Import/Export Tab.' Below this are three input fields: 'IMPORT MAP NAME' (with a blue border and a text entry cursor), 'DESCRIPTION' (a larger text area), and 'SCRIPT ID'. Each field has a label and a description. At the bottom right, there are three buttons: 'Cancel', '< Back', and 'Save & Run'. A dropdown menu is open under 'Save & Run', showing 'Save' and 'Run' options. Arrows from the text on the left point to the 'IMPORT MAP NAME' field and the 'Save & Run' button.