THE POWER OF BEING UNDERSTOOD

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WORKFLOW OVERVIEW: EXTENDING NETSUITE WITH SUITEFLOW

Rocky Mountain NetSuite User Group

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Agenda

Overview of SuiteFlow

Managing Existing Workflows

Workflow Demonstrations

Question and Answer

SuiteFlow provides a functional way to automate processes

Provides capabilities to create workflows in NetSuite

Defines and automates business processes

Handled through the user interface (Scripting not required)

Audience

Users who can run
Access to base or joined records associated to workflow

Users who can create and view
Admin and Super Users

Workflows have a broad range of use cases

- Transaction approval process
- Data entry validation
- Set field values on defined schedule
- Setting field display type
- Email based on conditions
- Add button to forms

Workflows and scripts have different strengths

Scripts have more capabilities

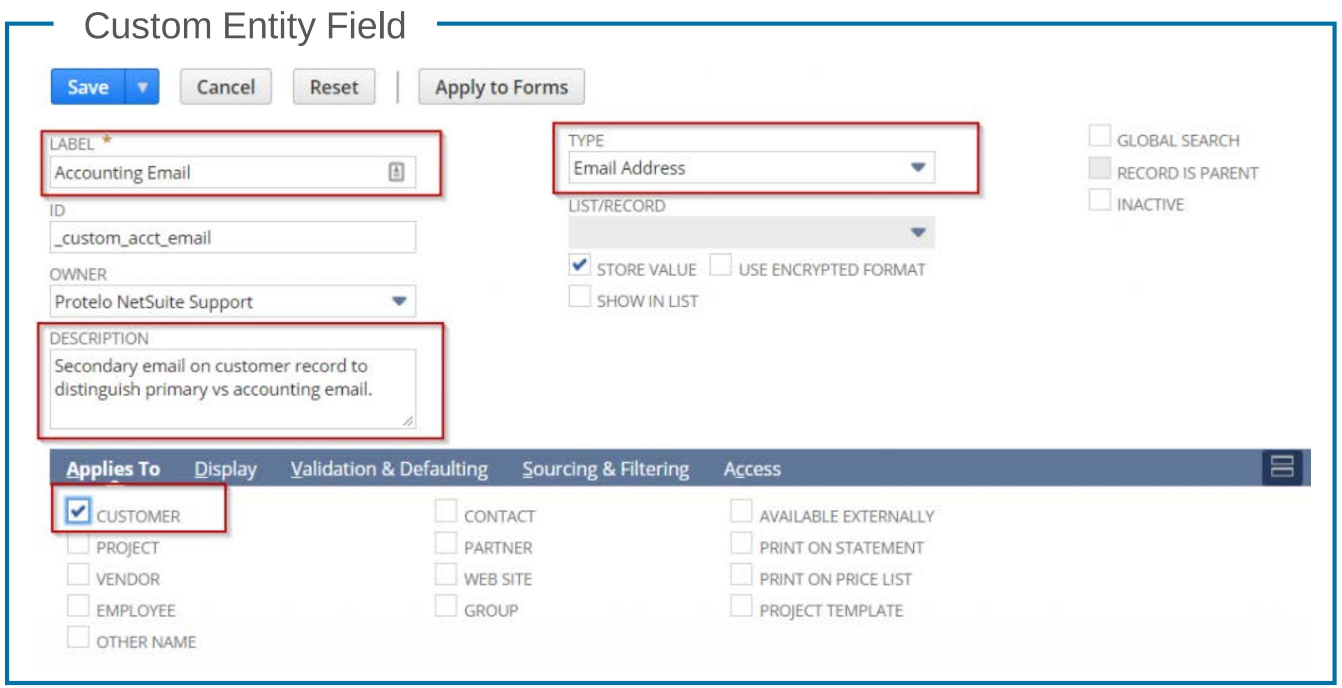
- Scripting can handle more complexity
- Multiple joins
- More accessibility within records
- Provides source control and migrating between environments

Workflows are more accessible

- Workflow has benefit of being less ‘complex’
- Can follow the process in the UI
- Larger user base as an audience to support and maintain

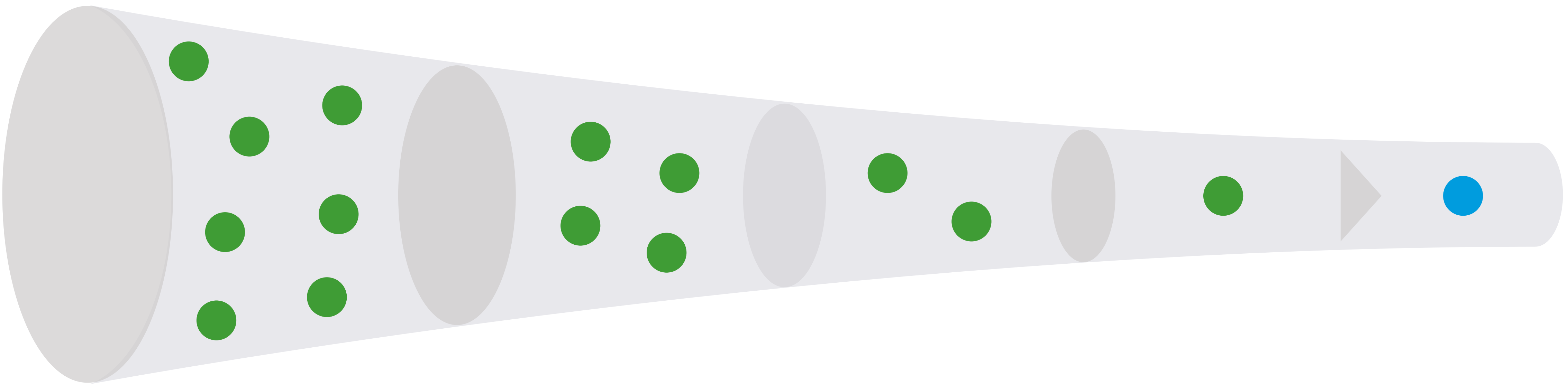
A custom field/form can be used in place of a workflow

1. Allows for default value
2. Ability to source from associated record
3. Can set field display type



Following the model provides the ability to choose the tool of best fit

CUSTOM FIELD/FORM 》 WORKFLOW 》 SCRIPT 》 FINAL DECISION



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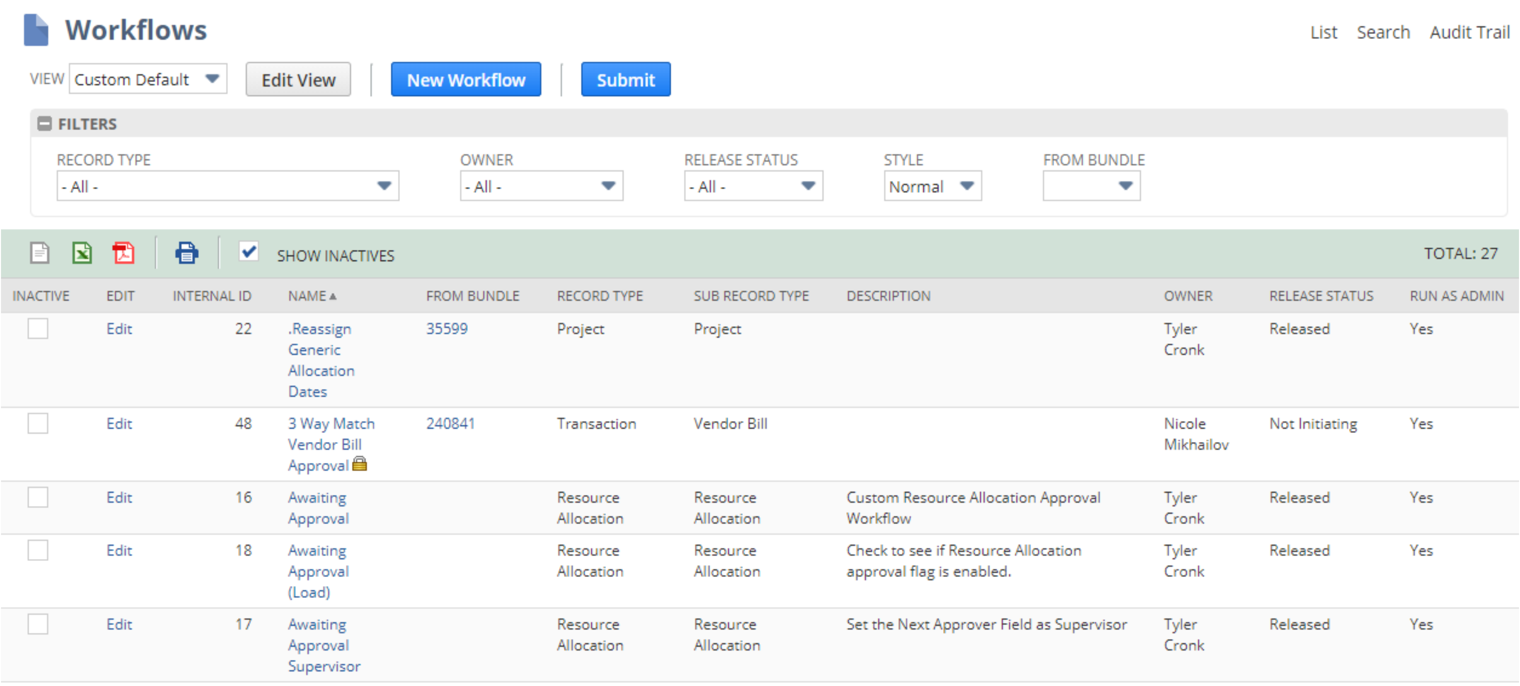
Question and Answer

Utilize the workflow list to manage workflows

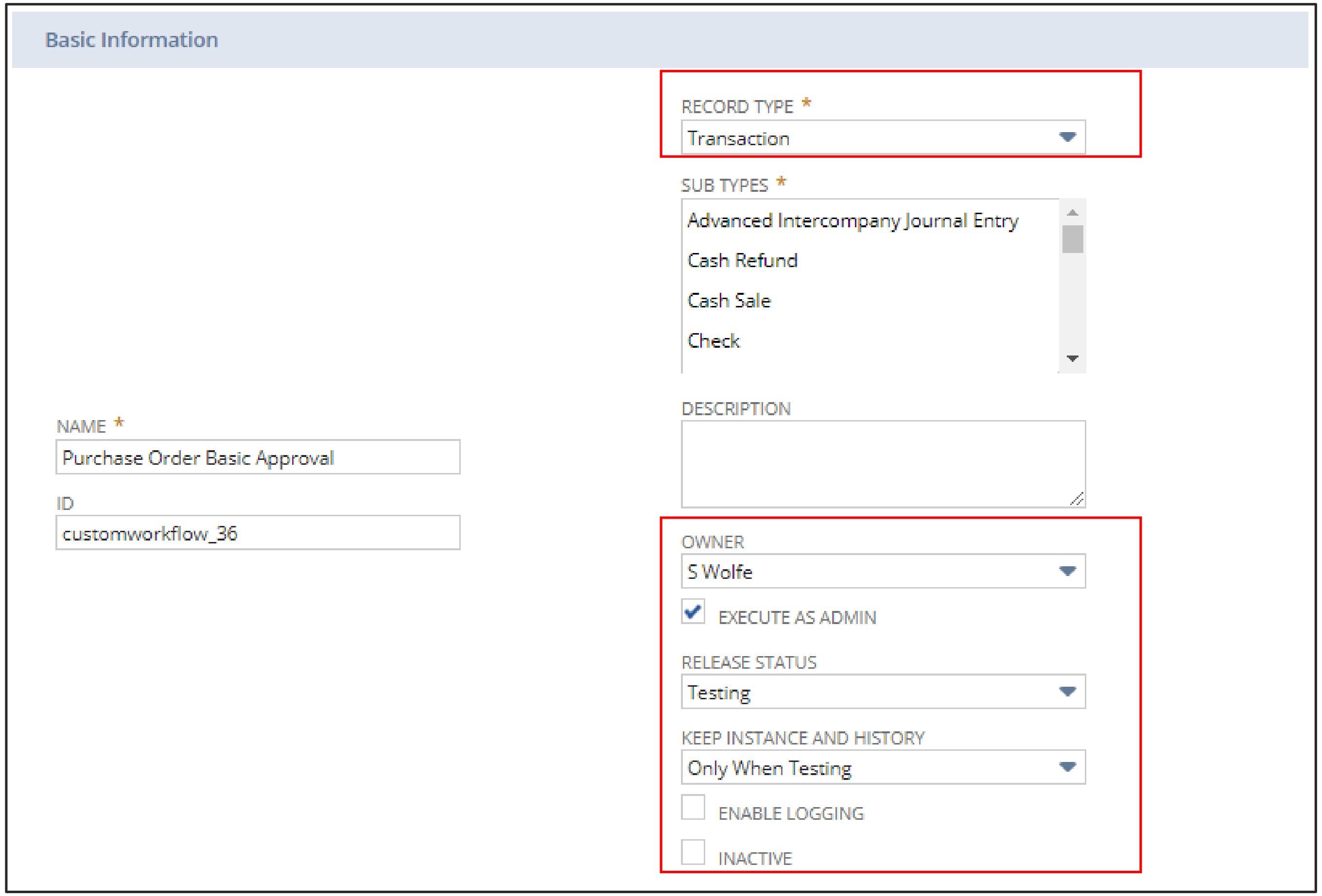
- Page can be customized
- Native Filters
  - Record Type
  - Owner
  - Release Status
  - From Bundle
- Customize as a saved search with Edit View

Existing Workflow List



Workflow definition sets attributes for the entire workflow

1. Specify record type
2. Option to execute as admin
3. Set release status
4. Instance and History



Understand the impact of release status selected

1. **Suspended**: No **new** instances of workflow are initiated, no **existing** workflow instances continue running

2. **Not Initiating**: Workflow does not initiate, but existing will continue running
   - Inactive: Workflow does not initiate, will only appear on list of workflows if ‘Show Inactive = T’

3. **Testing**: Only runs for employee listed in the owner field

4. **Released**: Workflow initiates for any user depending on workflow trigger

Workflow Instance saved searches can provide more focused results

- List of all workflow instances completed or in progress
- Locate results of scheduled workflows by using ‘workflow’ as filter
- Ability to locate all records workflow is running on
- Locate detail for each instance
- Does not provide access to the log
- Can be used on dashboard

Workflow Instance Search

Return To Criteria | Edit this Search

FILTERS

WORKFLOW: Invoice Collection Workflow | TYPE: - All - | STYLE: Normal

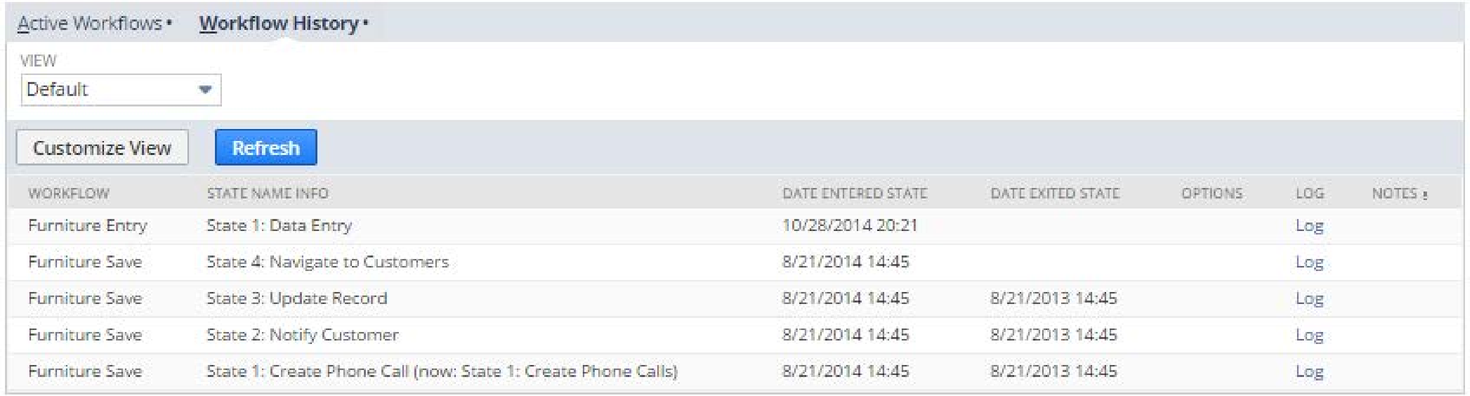
TOTAL: 321

INTERNAL ID	RECORD ▲	WORKFLOW	CURRENT STATE	DATE ENTERED WORKFLOW	DATE ENTERED STATE	DATE EXITED WORKFLOW	CURRENT STATE	LAST STATE	STATUS
26	Invoice #0068	Invoice Collection Workflow	Is 30 days overdue	1/21/2014 5:21 pm	1/21/2014 5:21 pm		Is 30 days overdue	Is 30 days overdue	Active
29	Invoice #0093	Invoice Collection Workflow	Create Phone Call	1/21/2014 5:34 pm	1/21/2014 5:34 pm		Create Phone Call	Create Phone Call	Active
28	Invoice #0094	Invoice Collection Workflow		1/21/2014 5:33 pm	1/21/2014 5:33 pm	1/21/2014 5:33 pm		Place credit on hold	Active
13062	Invoice #0114	Invoice Collection Workflow	Create Phone Call	5/28/2015 1:51 pm	5/28/2015 1:51 pm		Create Phone Call	Create Phone Call	Active
13058	Invoice #0127	Invoice Collection Workflow		5/28/2015 1:48 pm	5/28/2015 1:48 pm	5/28/2015 1:48 pm		Place credit on hold	Active
13050	Invoice #0145	Invoice Collection Workflow		5/28/2015 1:31 pm	5/28/2015 1:31 pm	5/28/2015 1:31 pm		Place credit on hold	Active
82	Invoice #0162	Invoice Collection Workflow	Send Email	1/17/2014 1:43 pm	5/5/2015 1:19 am		Send Email	Send Email	Active
27	Invoice #0183	Invoice Collection Workflow		1/21/2014 5:24 pm	5/5/2015 1:11 am	5/5/2015 1:11 am		Place credit on hold	Active
11003	Invoice #0235	Invoice Collection Workflow	Send Email	5/15/2015 1:48 pm	5/15/2015 1:48 pm		Send Email	Send Email	Active
11060	Invoice #0250	Invoice Collection Workflow		5/15/2015 1:53 pm	5/15/2015 1:53 pm	5/15/2015 1:53 pm		Place credit on hold	Active
10993	Invoice #0254	Invoice Collection Workflow		5/15/2015 1:45 pm	5/15/2015 1:45 pm	5/15/2015 1:45 pm		Place credit on hold	Active
13380	Invoice #0254	Invoice Collection Workflow		6/3/2015 6:19 pm	6/3/2015 6:19 pm	6/3/2015 6:19 pm		Place credit on hold	Active
10995	Invoice #0261	Invoice Collection Workflow		5/15/2015 1:45 pm	5/15/2015 1:45 pm	5/15/2015 1:45 pm		Place credit on hold	Active
11007	Invoice #0281	Invoice Collection Workflow		5/15/2015 1:49 pm	5/15/2015 1:49 pm	5/15/2015 1:49 pm		Place credit on hold	Active
11066	Invoice #0282	Invoice Collection Workflow		5/15/2015 1:54 pm	5/15/2015 1:54 pm	5/15/2015 1:54 pm		Place credit on hold	Active
11072	Invoice #0283	Invoice Collection Workflow	Send Email	5/15/2015 1:56 pm	5/15/2015 1:56 pm		Send Email	Send Email	Active

Instance and history records are the main troubleshooting method

1. Located on the record workflow is running on
2. Instance records are generated every time a workflow starts
3. History records are generated for every state the the workflow enters
4. Enable logging to view the actions and transitions performed by the workflow and validate conditions

Workflow history



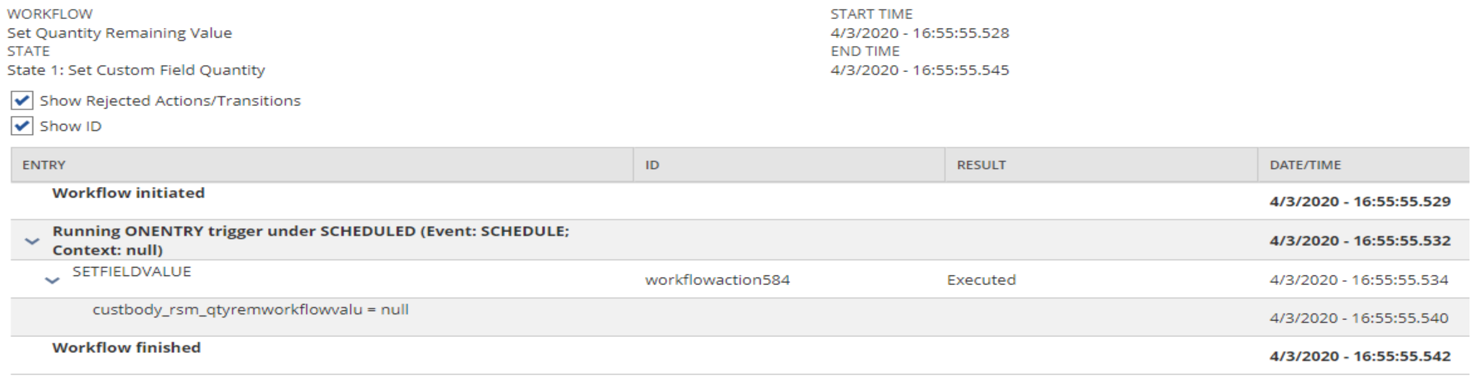
Active Workflows • Workflow History •

VIEW
Default

Customize View | Refresh

WORKFLOW	STATE NAME INFO	DATE ENTERED STATE	DATE EXITED STATE	OPTIONS	LOG	NOTES
Furniture Entry	State 1: Data Entry	10/28/2014 20:21			Log	
Furniture Save	State 4: Navigate to Customers	8/21/2014 14:45			Log	
Furniture Save	State 3: Update Record	8/21/2014 14:45	8/21/2013 14:45		Log	
Furniture Save	State 2: Notify Customer	8/21/2014 14:45	8/21/2013 14:45		Log	
Furniture Save	State 1: Create Phone Call (now: State 1: Create Phone Calls)	8/21/2014 14:45	8/21/2013 14:45		Log	

Workflow log



WORKFLOW
Set Quantity Remaining Value
STATE
State 1: Set Custom Field Quantity

START TIME
4/3/2020 - 16:55:55.528
END TIME
4/3/2020 - 16:55:55.545

☑ Show Rejected Actions/Transitions
☑ Show ID

ENTRY	ID	RESULT	DATE/TIME
Workflow initiated			**4/3/2020 - 16:55:55.529**
Running ONENTRY trigger under SCHEDULED (Event: SCHEDULE; Context: null)			**4/3/2020 - 16:55:55.532**
SETFIELDVALUE	workflowaction584	Executed	4/3/2020 - 16:55:55.534
custbody_rsm_qtyremworkflowvalu = null			4/3/2020 - 16:55:55.540
Workflow finished			**4/3/2020 - 16:55:55.542**

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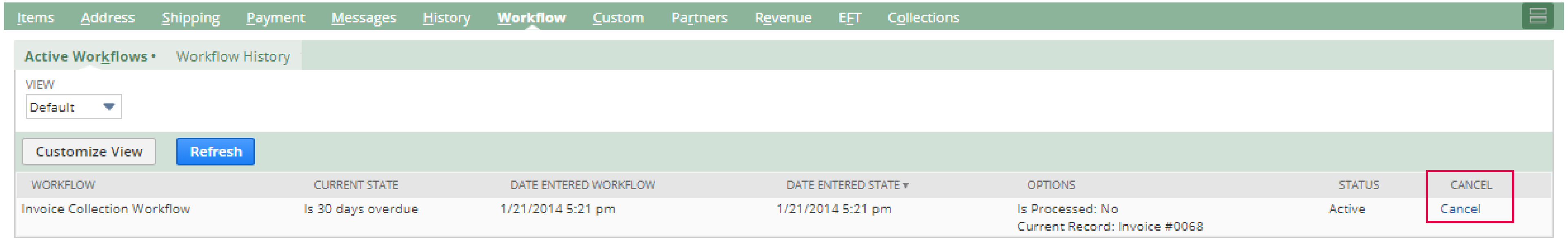
Handling in process workflows is also part of workflow management

1 Cancelling a single instance



2 Mass updates for workflows

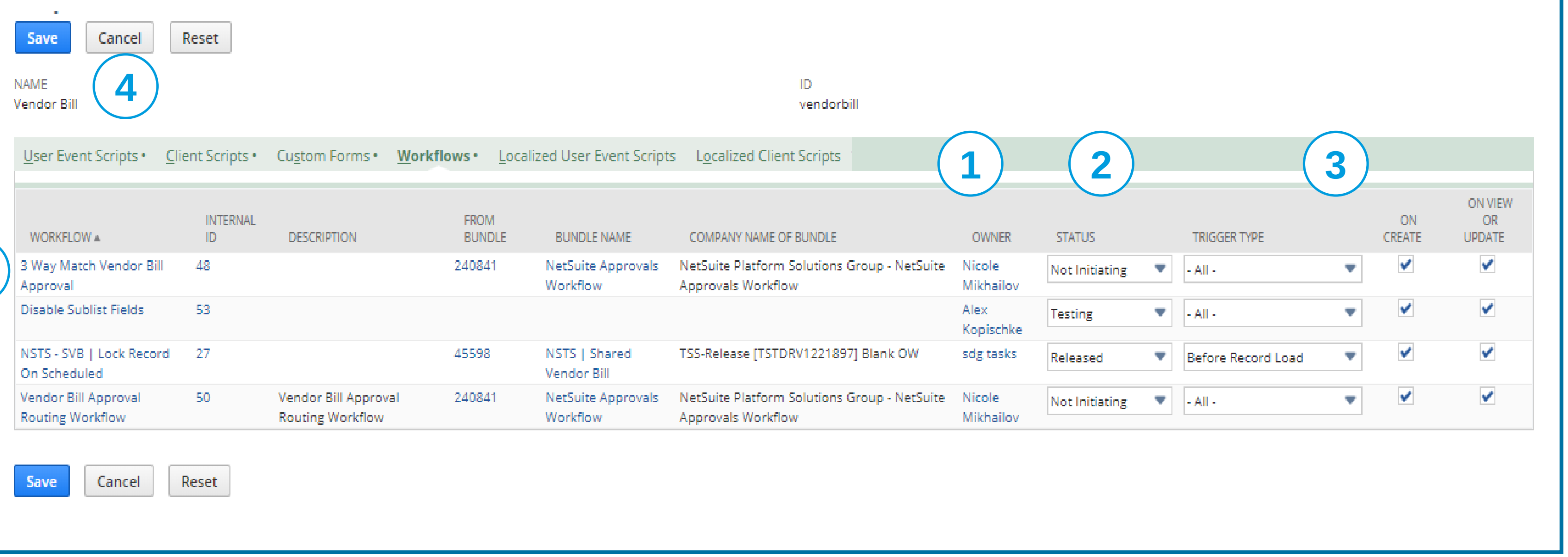
Update Type	Outcome
Initiate	Ability to execute workflow across many records at one time
Processing	Execute transition from current state to next state
Transitioning	Execute transition outside of the defined path
Canceling	Ability to cancel workflow across many records at one time

Scripted records page shows all workflows running on a specific record type

Customization > Scripting > Scripted Records

1. Workflow Owner
2. Current Workflow Status
3. Trigger Type/On Create or Update
4. Record Type
5. Workflow order – not editable
   - Generally execute in order create, to execute in specific order
     1. Manage with master workflow
     2. Have workflow kick of following workflow
     3. Do not have dependent workflows initiation user events

Vendor Bill Scripted Records Page



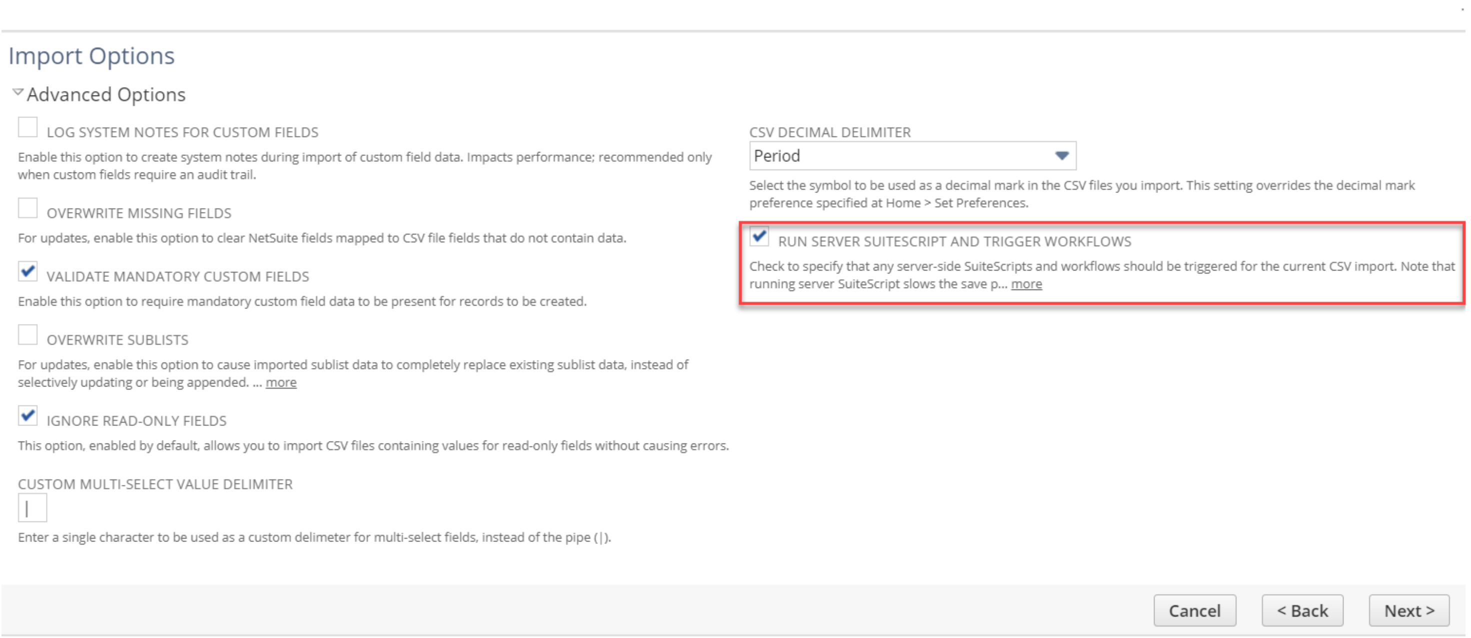
WORKFLOW ▲	INTERNAL ID	DESCRIPTION	FROM BUNDLE	BUNDLE NAME	COMPANY NAME OF BUNDLE	OWNER	STATUS	TRIGGER TYPE	ON CREATE	ON VIEW OR UPDATE
3 Way Match Vendor Bill Approval	48		240841	NetSuite Approvals Workflow	NetSuite Platform Solutions Group - NetSuite Approvals Workflow	Nicole Mikhailov	Not Initiating	- All -	✔	✔
Disable Sublist Fields	53					Alex Kopischke	Testing	- All -	✔	✔
NSTS - SVB | Lock Record On Scheduled	27		45598	NSTS | Shared Vendor Bill	TSS-Release [TSTDRV1221897] Blank OW	sdg tasks	Released	Before Record Load	✔	✔
Vendor Bill Approval Routing Workflow	50	Vendor Bill Approval Routing Workflow	240841	NetSuite Approvals Workflow	NetSuite Platform Solutions Group - NetSuite Approvals Workflow	Nicole Mikhailov	Not Initiating	- All -	✔	✔

Run server SuiteScript and trigger workflows must be enabled to trigger workflow that is based on record creation or update when importing records

Best Practice

- Have disabled when importing legacy data
- Have enabled when importing live data
- Running SuiteScript will slow the import process
- CSV Import Preferences to set company default

CSV Import Advance Options



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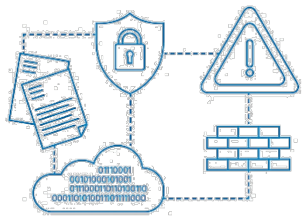
Question and Answer

It is essential to map out business processes prior to creating workflows

Business Process Sketch



Inputs

Start State: the trigger to execute

Actions Needed

Decisions: conditions & if statements

Completion: end goal of the flow

Method of Sketch

Visio, LucidChart, Word, Excel

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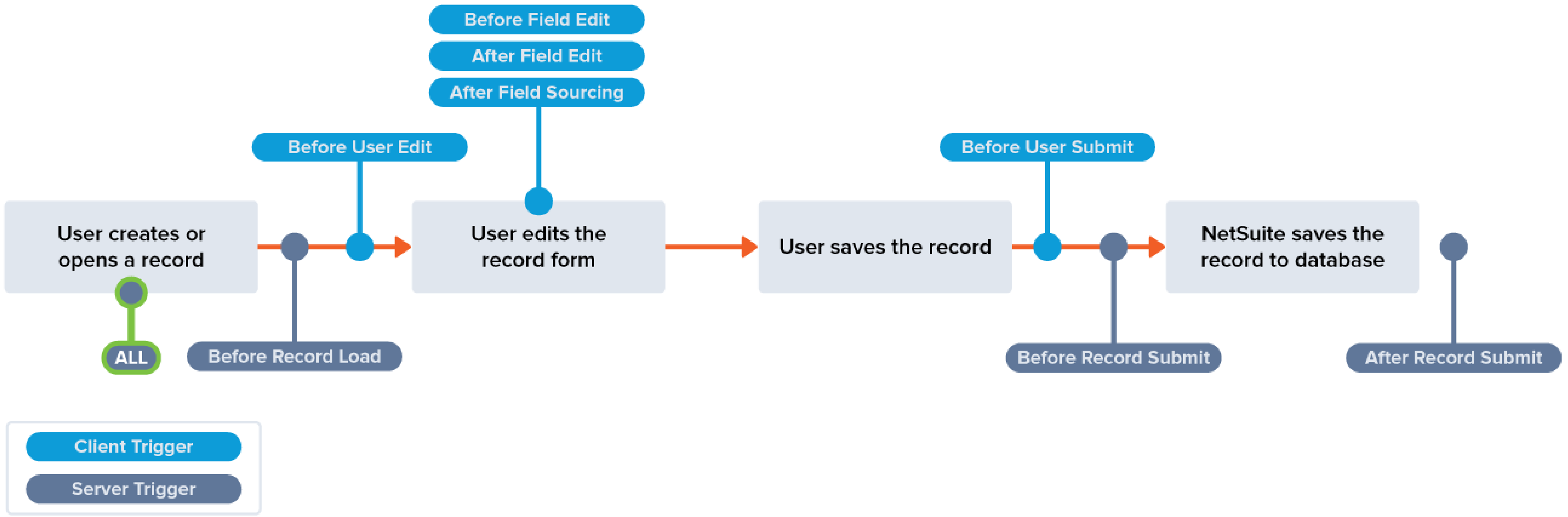
Action triggers drive the timing of workflow actions

Workflow trigger types and timing



Trigger execution model provides a guide for knowing which trigger to use

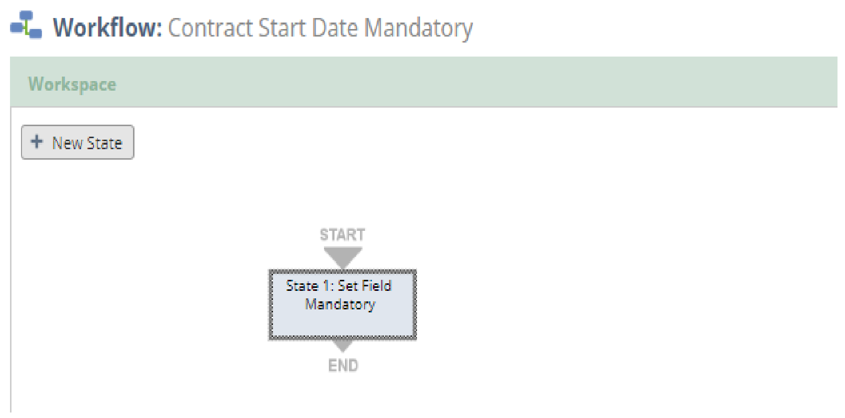
Use for reference when unsure on which trigger type is appropriate for you workflow

Record Action	Trigger	Actions	Transitions*
User creates or opens a record.	Before Record Load	1. Actions set to trigger on Entry execute the first time the record enters the state. 2. Actions set to trigger on Before Record Load execute.	1. Transitions set to trigger on Entry execute. 2. Transitions set to trigger on Before Record Load execute.
Record loads into the browser.	Any client trigger	Actions set to a client trigger execute, if applicable.	None. Transitions do not execute on client triggers.
User clicks **Save** on the record.	Before Record Submit	Actions set to trigger on Before Record Submit execute.	Transitions set to trigger on Before Record Submit execute.
	After Record Submit	Actions set to trigger on After Record Submit execute.	Transitions set to trigger on After Record Submit execute.
* **Note:** Transitions with no **Trigger On** value (blank trigger) execute as soon as the conditions are met.			

Workflow Demo: Data Entry Validation

- Set Field Mandatory After Field Edit
  - Single State
  - Client Trigger
    - Action = Set Field Mandatory
    - Action = Set Field Display Type
  - Condition based on field value
  - Workflow History

Workflow Diagrammer



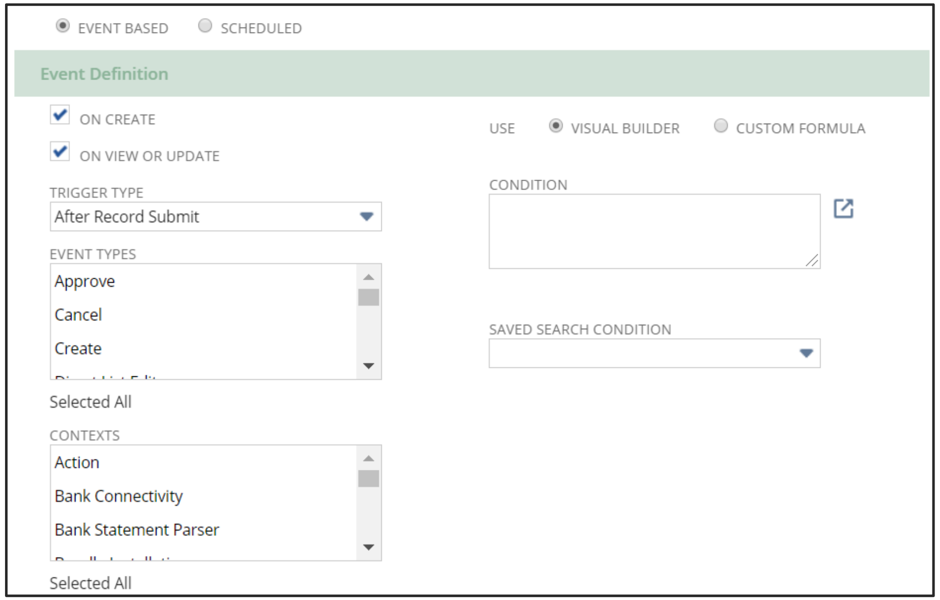
NETSUITE DEMO

Data Entry Validation

Initiation specifies the input to kickoff a workflow

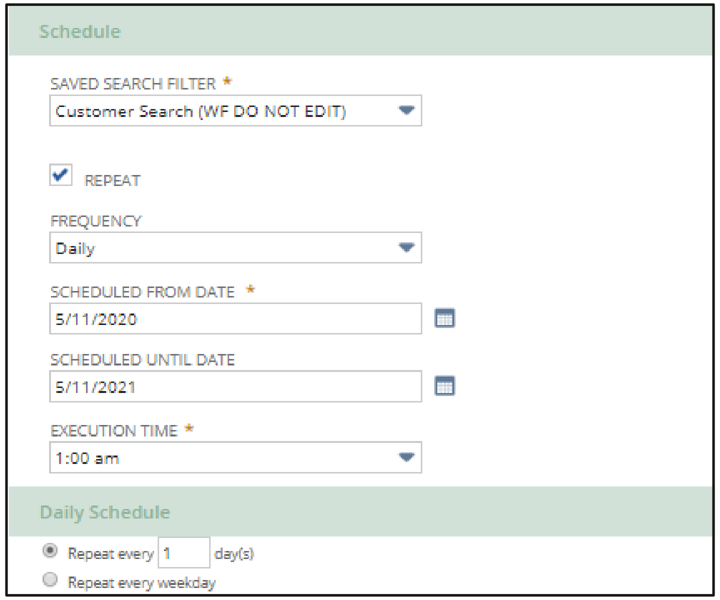
Event based

- Select Trigger Type
- Event Type
- Context



Scheduled

- Requires Saved Search
- Frequency
- Start Date
- End Date



Workflow Demo: Scheduled Workflow Setting Field Value

- Scheduled Workflow – Set Field Value on Customer
  - Field not available to mass update, can use workflow to set value
  - Define Saved Search
    - Type = Customer
    - Criteria = Fields being updated
  - Use testing to execute right away
  - Managing instance records generated

NETSUITE DEMO

Scheduled Workflow

Workflow templates assist in starting your workflow

Workflow templates out of the box

Journal Entry Basic Approval

The Journal Entry approval process prevents users from being able to approve or reject journal entries that they create. With the approval process, a journal entry can be approved or rejected only by an administrator or by the supervisor of the person who created the record. (The only exception is if the creator is at the top of the user hierarchy and has no supervisor. In this case, the person who created the record can approve or reject the journal entry.) If a journal entry is rejected, its creator or an administrator can re-submit it

Select

Purchase Order Basic Approval

The purchase order approval process lets the user create and edit purchase orders and send them for approval. After this point, the purchase order is locked to all users except the approver. If the approver rejects the purchase order, its status changes to rejected, and the transaction becomes editable for the person who created the purchase order and for account administrators. Rejected purchase orders can be resubmitted for approval. Once a transaction is approved, it stays locked to all users except account administrators.

Select

Sales Order Basic Approval

With this process, a sales order is automatically approved if one of the following is true:

- The total amount of the sales order is $300 or less and customer's overdue balance is $0.
- The creator does not have a supervisor.

If the sales order is not automatically approved, a manual approval process begins. An approver can edit, approve, reject, or cancel the sales order. If the sales order is

Select

Lead Nurturing

This Workflow template showcases a lead nurturing campaign which would typically be designed by a marketing department.

The template includes the following workflow components:

- Scheduled transitions to achieve delays between steps of the lead nurturing process
- Conditional transitions to finish the process in case the lead becomes customer
- Send Campaign Email Action to send a

Select

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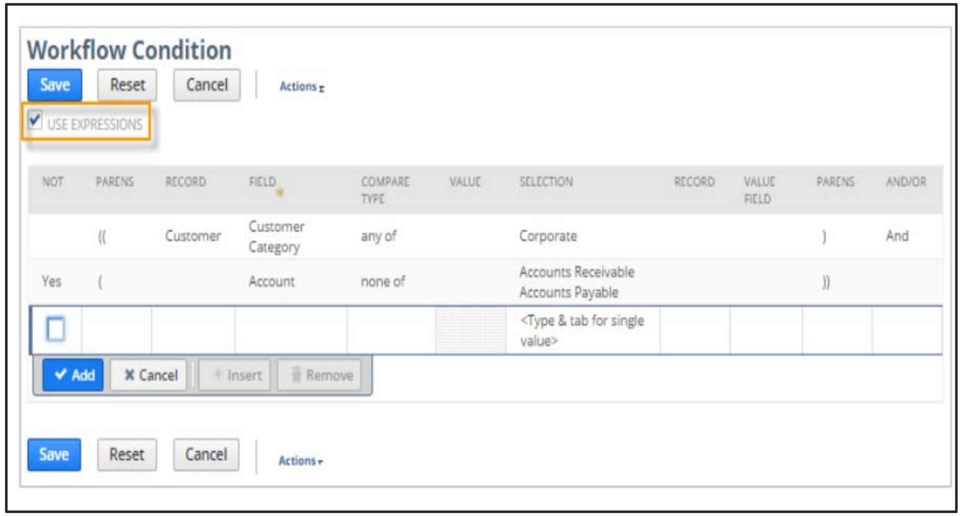
Building conditions creates more dynamic workflows

Conditions can be built based on three methods

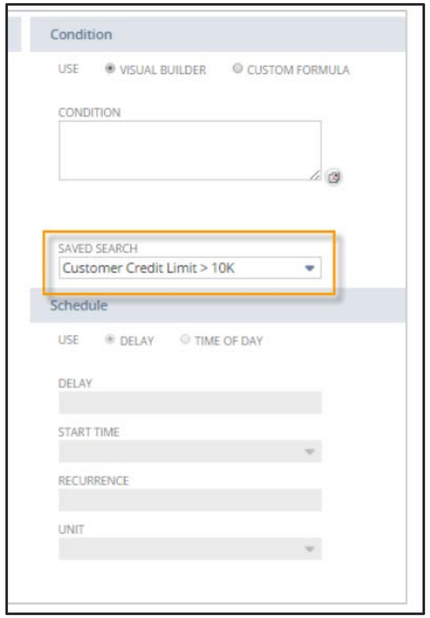
1 Formula

- FUNCTION
  - » SQL or SuiteScript API
- JOIN
  - » List/Record fields
- VALUE FIELD
  - » Form, workflow, and state fields

2 Expression



3 Search



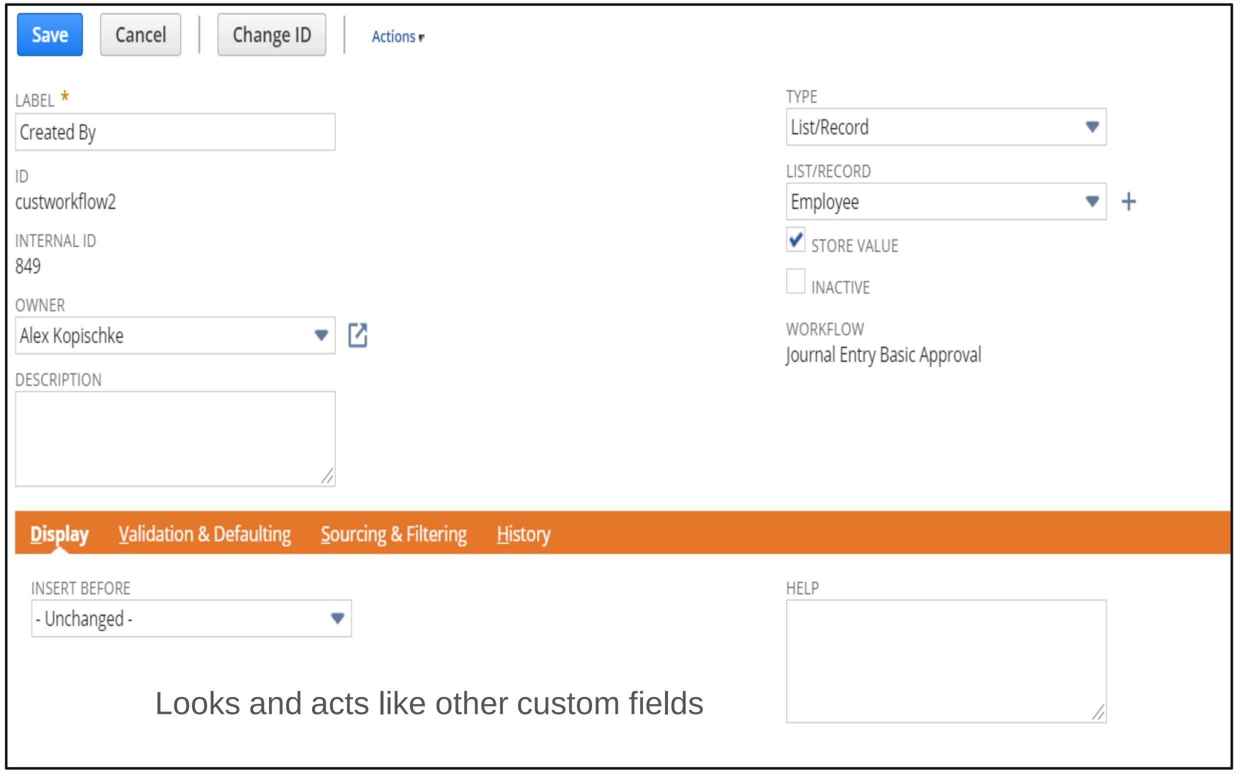
Workflow and state fields allow for saving and using values within a workflow

Workflow Field

- Applies to single workflow
- Stores unique value for each record workflow runs on
  - Ex. Store transaction entry user supervisor for use in approval workflow.
  - Common use cases

State field

- Applies to single state in a workflow
- Can only be used within the state the field is applied to
  - Fewer use cases

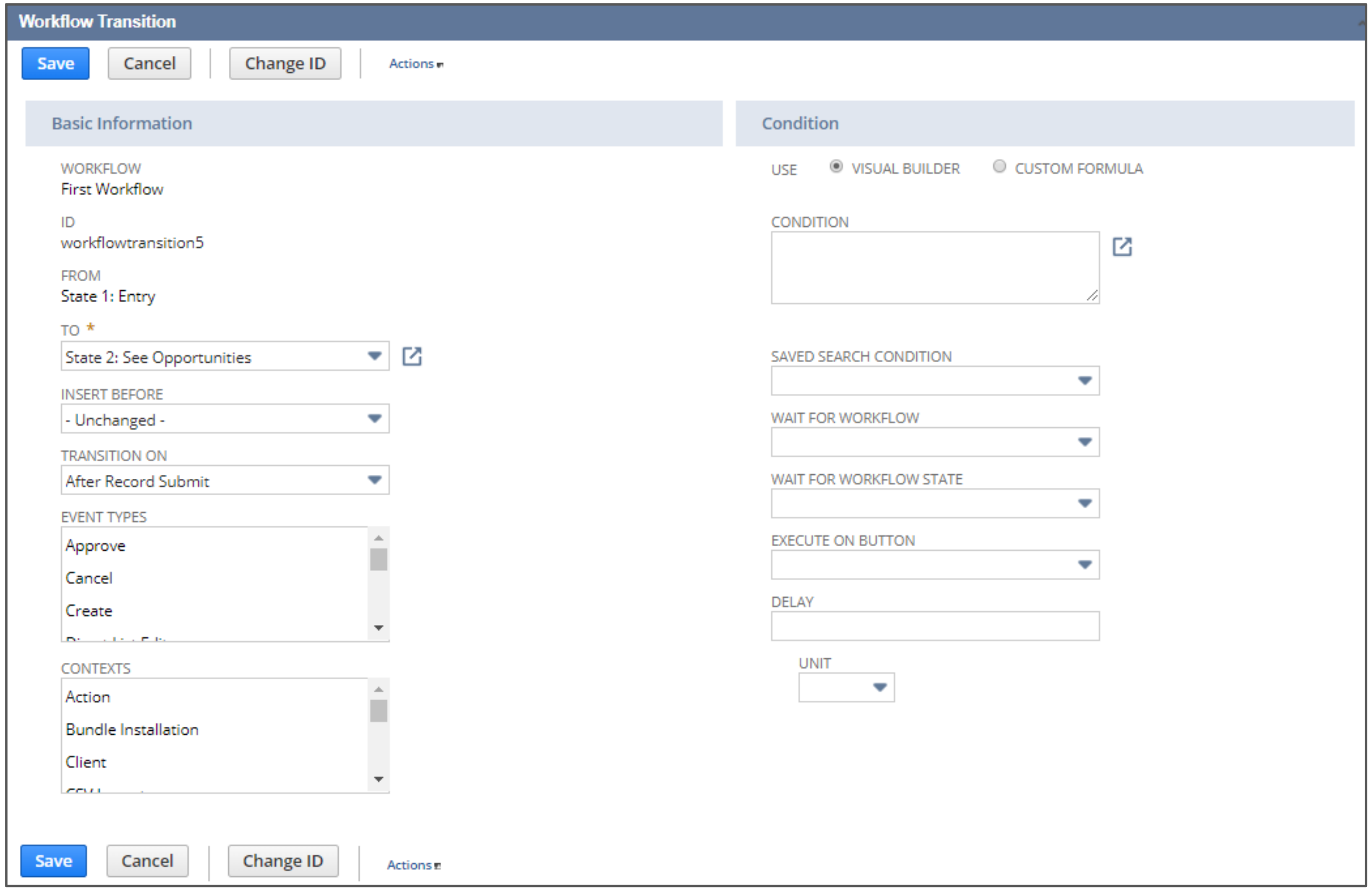


Looks and acts like other custom fields

Transitions move workflows between states

Edit Transitions in Workflow Editor

Define Transition Trigger and Conditions



Workflow Demo: Single Step Approval

- Purchase Order Approval
  - Start with template
  - Allow to transition directly to approved based on transaction total
  - Allows for rejection and reapproval
  - Save approver to workflow field
  - Send emails when approved/rejected

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NETSUITE DEMO

Single Step Approval

Sublist accessibility is a 'new' feature in workflows still being developed

1. Accessing the sublist is done by creating a sublist action groups. Only sublist available is items sublist (one exception below)

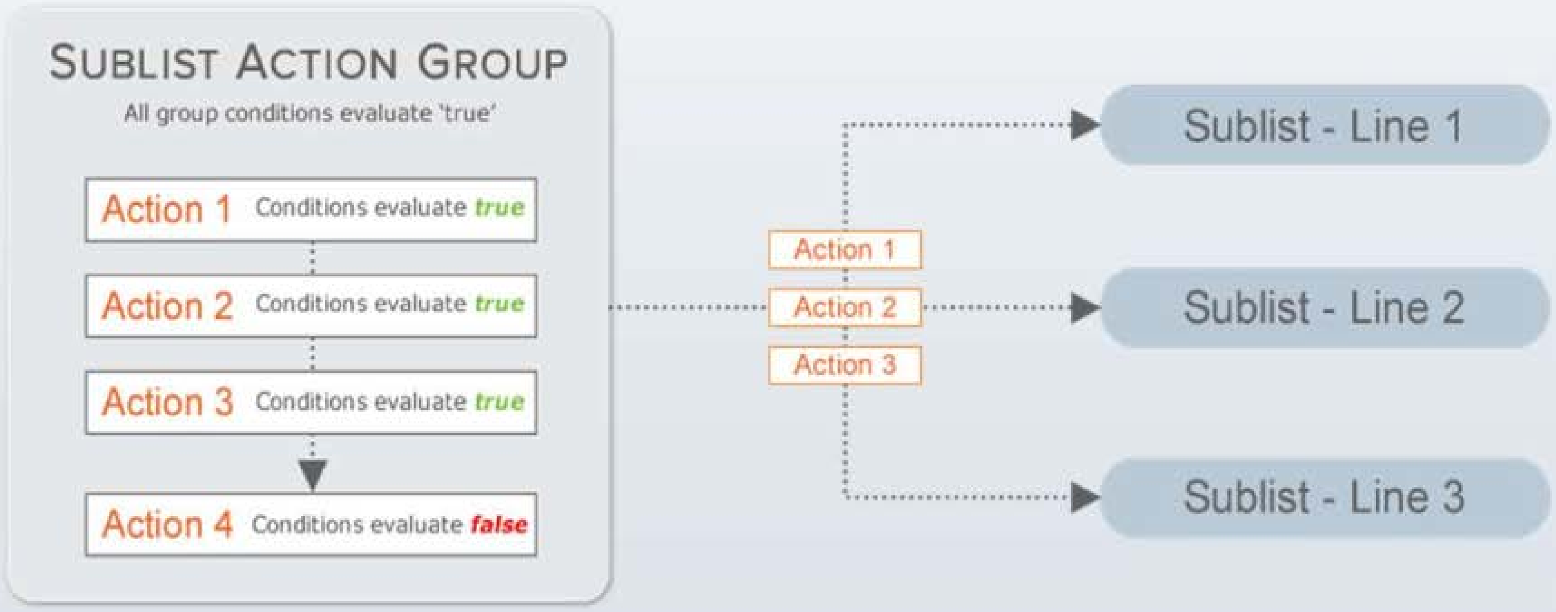
2. Not all fields in items sublist are available to Workflow

   If field is not in drop down, it is not available (no formula work around)

3. As of 2020.01 sublist actions are supported on expense sublists on Expense Report Records **ONLY**

4. Expect more functionality in the future for accessing sublists

Processing sublist lines impacts all lines that meet a condition



Sublist Action Groups process the Items sublist line-by-line. Sublist Action Group conditions and individual action conditions must evaluate true for the group/action to be executed on sublist lines.

Workflow Demo: Sublist

- Sublist Workflow – Customer Quantity Price Discount
  - Update sublist field values based on conditions for item and quantity to set a discount
  - Sublist Action Group Condition – Configure actions within workflow states that are executed on each line of items sublist
  - Set Field Value Condition
    - Syntax to reference in formula is line.{fieldid}

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Set Sublist Field Mandatory

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THANK YOU FOR YOUR TIME AND ATTENTION

QUESTIONS AND ANSWERS

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