

# THE POWER OF BEING UNDERSTOOD

# WORKFLOW OVERVIEW: EXTENDING NETSUITE WITH SUITEFLOW

Rocky Mountain NetSuite User Group



Alex Kopischke

# Agenda

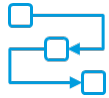
Overview of SuiteFlow

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

Custom Entity Field

Save Cancel Reset Apply to Forms

**LABEL** ★  
Accounting Email

ID  
\_custom\_acct\_email

OWNER  
Protelo NetSuite Support

**DESCRIPTION**  
Secondary email on customer record to distinguish primary vs accounting email.

**TYPE**  
Email Address

LIST/RECORD  
STORE VALUE USE ENCRYPTED FORMAT  
SHOW IN LIST

GLOBAL SEARCH  
RECORD IS PARENT  
INACTIVE

**Applies To** Display Validation & Defaulting Sourcing & Filtering Access

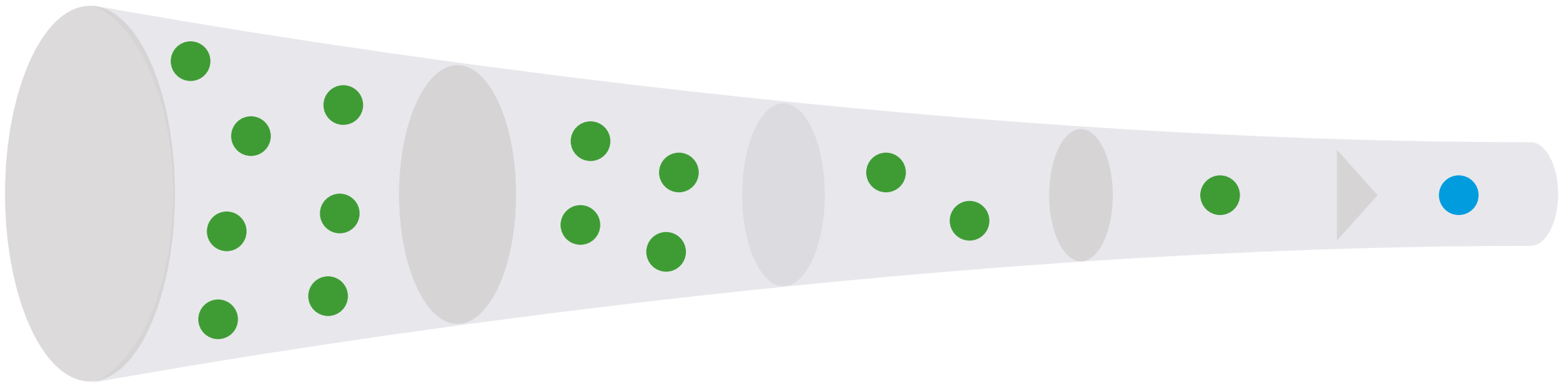
☒ CUSTOMER  
☐ PROJECT  
☐ VENDOR  
☐ EMPLOYEE  
☐ OTHER NAME

☐ CONTACT  
☐ PARTNER  
☐ WEB SITE  
☐ GROUP

☐ AVAILABLE EXTERNALLY  
☐ PRINT ON STATEMENT  
☐ PRINT ON PRICE LIST  
☐ PROJECT TEMPLATE

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

CUSTOM FIELD/FORM >> WORKFLOW >> SCRIPT >> FINAL DECISION





# Agenda

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# 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

### Workflows

List Search Audit Trail

VIEW Custom Default Edit View New Workflow Submit

**FILTERS**

RECORD TYPE: - All - OWNER: - All - RELEASE STATUS: - All - STYLE: Normal FROM BUNDLE:

SHOW INACTIVES TOTAL: 27

INACTIVE	EDIT	INTERNAL ID	NAME ▲	FROM BUNDLE	RECORD TYPE	SUB RECORD TYPE	DESCRIPTION	OWNER	RELEASE STATUS	RUN AS ADMIN
<input type="checkbox"/>	Edit	22	.Reassign Generic Allocation Dates	35599	Project	Project		Tyler Cronk	Released	Yes
<input type="checkbox"/>	Edit	48	3 Way Match Vendor Bill Approval	240841	Transaction	Vendor Bill		Nicole Mikhailov	Not Initiating	Yes
<input type="checkbox"/>	Edit	16	Awaiting Approval		Resource Allocation	Resource Allocation	Custom Resource Allocation Approval Workflow	Tyler Cronk	Released	Yes
<input type="checkbox"/>	Edit	18	Awaiting Approval (Load)		Resource Allocation	Resource Allocation	Check to see if Resource Allocation approval flag is enabled.	Tyler Cronk	Released	Yes
<input type="checkbox"/>	Edit	17	Awaiting Approval Supervisor		Resource Allocation	Resource Allocation	Set the Next Approver Field as Supervisor	Tyler Cronk	Released	Yes

# 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

Basic Information

RECORD TYPE \*  
Transaction

SUB TYPES \*  
Advanced Intercompany Journal Entry  
Cash Refund  
Cash Sale  
Check

NAME \*  
Purchase Order Basic Approval

ID  
customworkflow\_36

DESCRIPTION

OWNER  
S Wolfe

☒ EXECUTE AS ADMIN

RELEASE STATUS  
Testing

KEEP INSTANCE AND HISTORY  
Only When Testing

☐ ENABLE LOGGING

☐ INACTIVE

# 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:  TYPE:  STYLE:

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

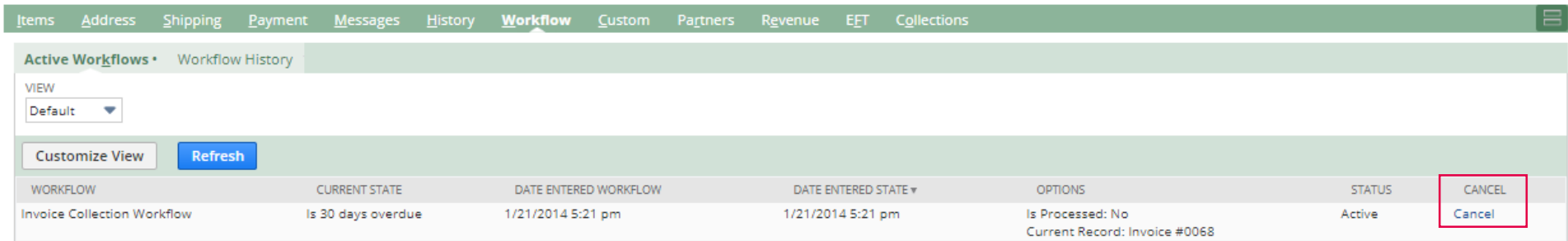
☒ Show Rejected Actions/Transitions

☒ 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

# Handling in process workflows is also part of workflow management

## 1 Cancelling a single instance



The screenshot shows a web application interface for workflow management. At the top is a navigation bar with tabs: Items, Address, Shipping, Payment, Messages, History, Workflow (selected), Custom, Partners, Revenue, EFT, and Collections. Below the navigation bar, there's a section for 'Active Workflows' and 'Workflow History'. A 'VIEW' dropdown is set to 'Default'. Below that are 'Customize View' and 'Refresh' buttons. The main part of the interface is a table with the following columns: WORKFLOW, CURRENT STATE, DATE ENTERED WORKFLOW, DATE ENTERED STATE, OPTIONS, STATUS, and CANCEL. A single row is visible for 'Invoice Collection Workflow' with the state 'Is 30 days overdue', entered on '1/21/2014 5:21 pm'. The 'OPTIONS' column contains 'Is Processed: No' and 'Current Record: Invoice #0068'. The 'STATUS' is 'Active'. The 'CANCEL' button in the last column is highlighted with a red rectangular box.

WORKFLOW	CURRENT STATE	DATE ENTERED WORKFLOW	DATE ENTERED STATE	OPTIONS	STATUS	CANCEL
Invoice Collection Workflow	Is 30 days overdue	1/21/2014 5:21 pm	1/21/2014 5:21 pm	Is Processed: No Current Record: Invoice #0068	Active	Cancel

## 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 off following workflow
  3. Do not have dependent workflows initiation user events

Vendor Bill Scripted Records Page

Save Cancel Reset

NAME Vendor Bill ID vendorbill

4

User Event Scripts • Client Scripts • Custom Forms • **Workflows** • Localized User Event Scripts Localized Client Scripts

1 2 3

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 -	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Disable Sublist Fields	53					Alex Kopischke	Testing	- All -	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
NSTS - SVB   Lock Record On Scheduled	27		45598	NSTS   Shared Vendor Bill	TSS-Release [TSTDREV1221897] Blank OW	sdg tasks	Released	Before Record Load	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
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 -	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel Reset

5



# 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

### Import Options

#### ▼ 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

This option, enabled by default, allows you to import CSV files containing values for read-only fields without causing errors.

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

Period

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.

☒ RUN SERVER SUITESCRIPT AND TRIGGER WORKFLOWS

Check to specify that any server-side SuiteScripts and workflows should be triggered for the current CSV import. Note that running server SuiteScript slows the save p... [more](#)

Cancel

< Back

Next >

# Agenda

Overview of SuiteFlow

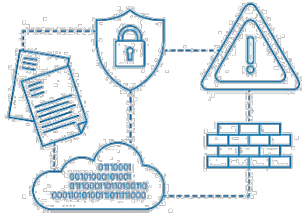
Managing Existing Workflows

Workflow Demonstrations

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

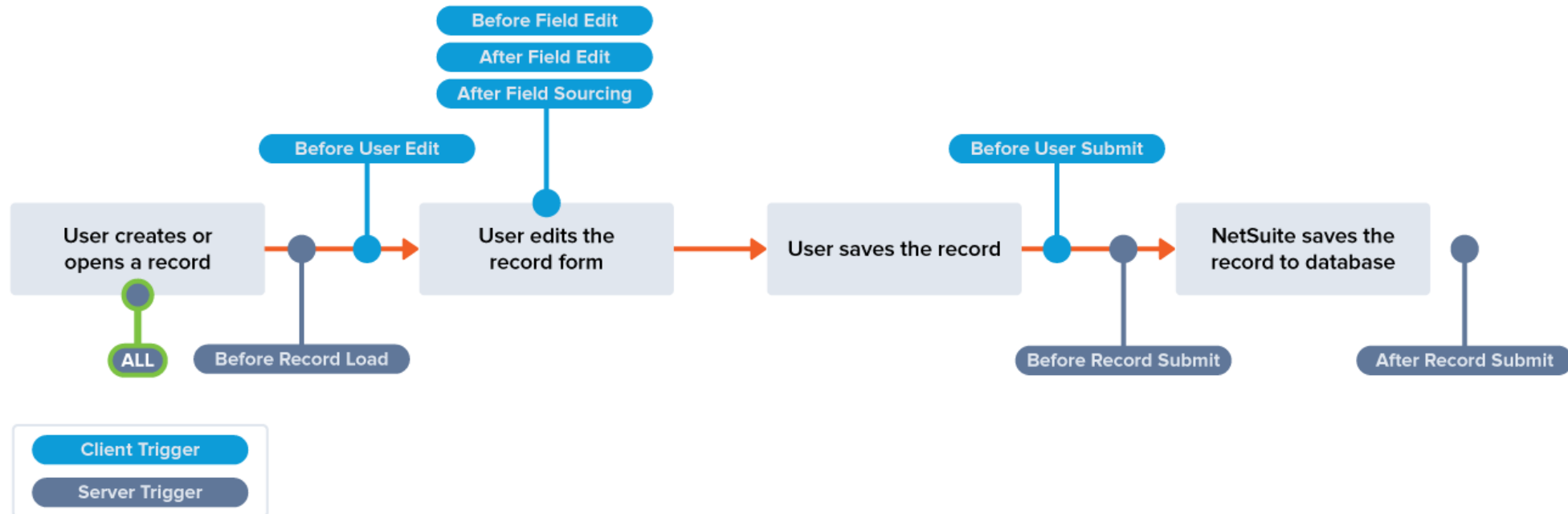
## Method of Sketch



Visio, LucidChart, Word, Excel

# Action triggers drive the timing of workflow actions

## Workflow trigger types and timing



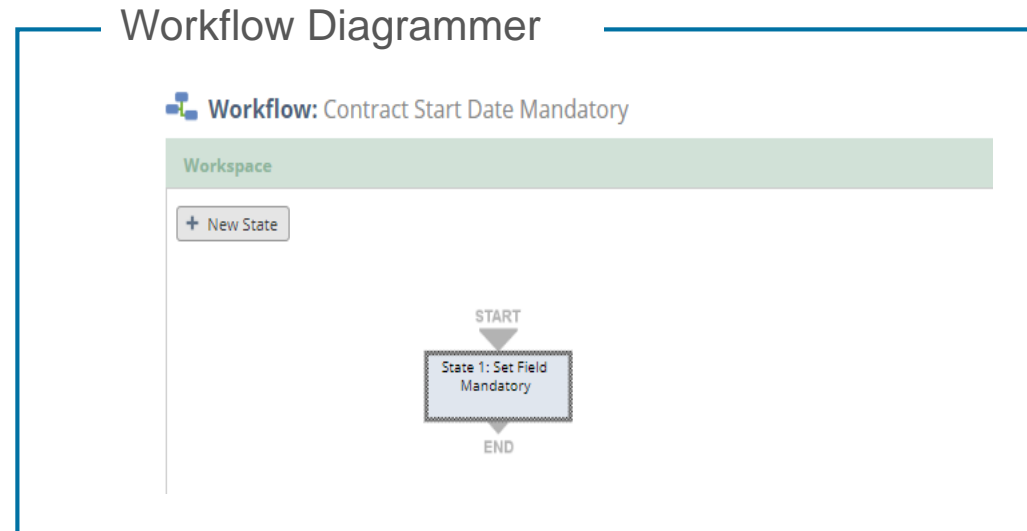
# Trigger execution model provides a guide for knowing which trigger to use

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	<ol style="list-style-type: none"><li>1. Actions set to trigger on Entry execute the first time the record enters the state.</li><li>2. Actions set to trigger on Before Record Load execute.</li></ol>	<ol style="list-style-type: none"><li>1. Transitions set to trigger on Entry execute.</li><li>2. Transitions set to trigger on Before Record Load execute.</li></ol>
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 <b>Save</b> 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.
<b>* Note:</b> Transitions with no <b>Trigger On</b> 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



# NETSUITE DEMO

Data Entry Validation

# Initiation specifies the input to kickoff a workflow

## Event based

- Select Trigger Type
- Event Type
- Context

The screenshot shows the 'Event Definition' configuration interface. At the top, there are two radio buttons: 'EVENT BASED' (selected) and 'SCHEDULED'. Below this is a green header bar labeled 'Event Definition'. Underneath, there are two checkboxes: 'ON CREATE' and 'ON VIEW OR UPDATE', both of which are checked. To the right of these checkboxes are two radio buttons: 'VISUAL BUILDER' (selected) and 'CUSTOM FORMULA'. Below the checkboxes, there is a 'TRIGGER TYPE' dropdown menu with 'After Record Submit' selected. To the right of this is a 'CONDITION' text box with a small icon to its right. Below the trigger type, there is a list of 'EVENT TYPES' with 'Approve', 'Cancel', and 'Create' visible. Below this list is a 'SELECTED ALL' button. To the right of the event types is a 'SAVED SEARCH CONDITION' dropdown menu. Below the event types, there is a list of 'CONTEXTS' with 'Action', 'Bank Connectivity', and 'Bank Statement Parser' visible. Below this list is another 'SELECTED ALL' button.

## Scheduled

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

The screenshot shows the 'Schedule' configuration interface. At the top is a green header bar labeled 'Schedule'. Below this is a 'SAVED SEARCH FILTER' dropdown menu with 'Customer Search (WF DO NOT EDIT)' selected. Below this is a checkbox labeled 'REPEAT' which is checked. Below the checkbox is a 'FREQUENCY' dropdown menu with 'Daily' selected. Below the frequency is a 'SCHEDULED FROM DATE' text box with '5/11/2020' entered. Below this is a 'SCHEDULED UNTIL DATE' text box with '5/11/2021' entered. Below the dates is an 'EXECUTION TIME' dropdown menu with '1:00 am' selected. Below the execution time is a green header bar labeled 'Daily Schedule'. Below this header bar are two radio buttons: 'Repeat every 1 day(s)' (selected) and 'Repeat every weekday'.



# 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

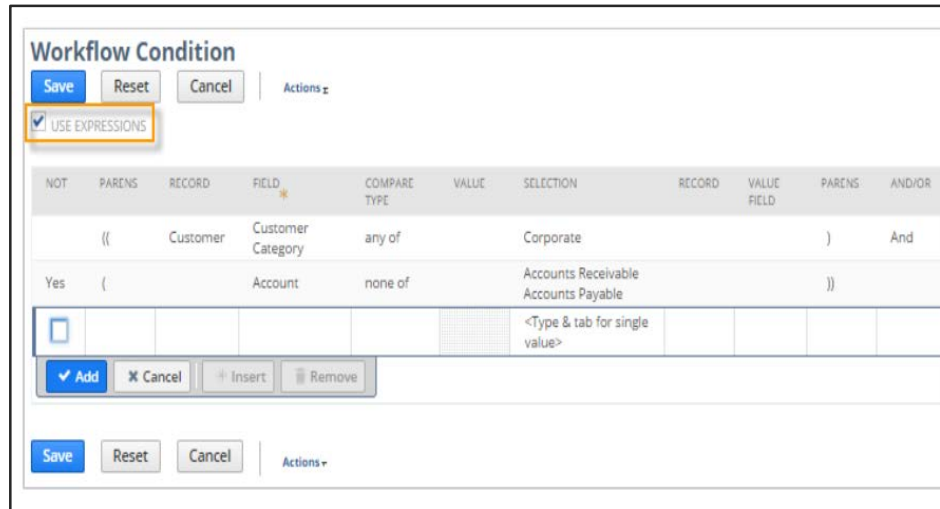
# Building conditions creates more dynamic workflows

Conditions can be built based on three methods

## 1 Formula

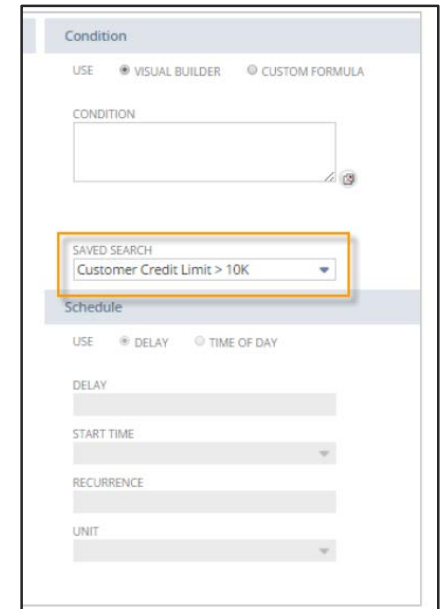
- **FUNCTION**
  - » SQL or SuiteScript API
- **JOIN**
  - » List/Record fields
- **VALUE FIELD**
  - » Form, workflow, and state fields

## 2 Expression



NOT	PARENS	RECORD	FIELD	COMPARE TYPE	VALUE	SELECTION	RECORD	VALUE FIELD	PARENS	AND/OR
	((	Customer	Customer Category	any of		Corporate			)	And
Yes	(	Account		none of		Accounts Receivable Accounts Payable			)	
						<Type & tab for single value>				

## 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

The screenshot displays the configuration interface for a Workflow Field. At the top, there are buttons for 'Save' (in blue), 'Cancel', 'Change ID', and an 'Actions' dropdown. The main configuration area is divided into two columns. The left column contains fields for 'LABEL' (with a star icon) set to 'Created By', 'ID' set to 'custworkflow2', 'INTERNAL ID' set to '849', 'OWNER' (a dropdown menu showing 'Alex Kopischke' with an external link icon), and 'DESCRIPTION' (a large text area). The right column contains 'TYPE' (a dropdown menu set to 'List/Record'), 'LIST/RECORD' (a dropdown menu set to 'Employee' with a plus icon), a checked 'STORE VALUE' checkbox, an unchecked 'INACTIVE' checkbox, and 'WORKFLOW' (set to 'Journal Entry Basic Approval'). Below these fields is an orange navigation bar with tabs: 'Display' (active), 'Validation & Defaulting', 'Sourcing & Filtering', and 'History'. Under the 'Display' tab, there is an 'INSERT BEFORE' dropdown menu set to '- Unchanged -' and a 'HELP' text area. At the bottom of the interface, the text 'Looks and acts like other custom fields' is displayed.

# Transitions move workflows between states

## Edit Transitions in Workflow Editor



## Define Transition Trigger and Conditions

**Workflow Transition**

Save Cancel Change ID Actions

**Basic Information**

WORKFLOW  
First Workflow

ID  
workflowtransition5

FROM  
State 1: Entry

TO \*  
State 2: See Opportunities

INSERT BEFORE  
- Unchanged -

TRANSITION ON  
After Record Submit

EVENT TYPES  
Approve  
Cancel  
Create  
Delete  
Edit  
View

CONTEXTS  
Action  
Bundle Installation  
Client  
CRM

**Condition**

USE ☒ VISUAL BUILDER ☐ CUSTOM FORMULA

CONDITION

SAVED SEARCH CONDITION

WAIT FOR WORKFLOW

WAIT FOR WORKFLOW STATE

EXECUTE ON BUTTON

DELAY

UNIT

Save Cancel Change ID Actions

# 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

# NETSUITE DEMO

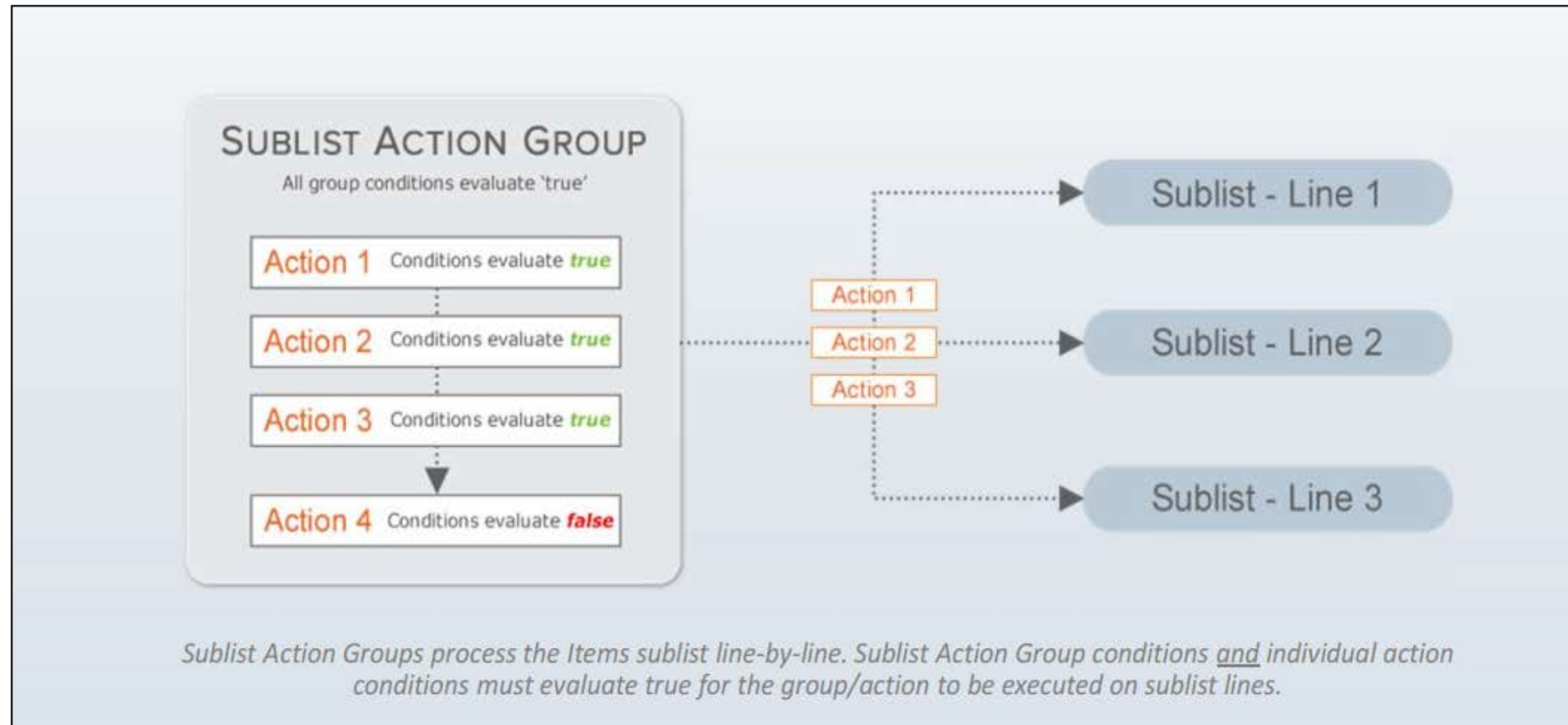
Single Step Approval



# 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



# 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}

# NETSUITE DEMO

Set Sublist Field Mandatory

THANK YOU FOR  
YOUR TIME AND  
ATTENTION

# QUESTIONS AND ANSWERS

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