



NetSuite Implementation, Consulting, and Support

Oracle NetSuite North America Solution Provider  
2020 Partner of the Year

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# **CUSTOMIZING NETSUITE**

Presented by Cory Anderson – NetSuite Managed Services Team Lead

# INTRODUCTION TO CUSTOMIZATIONS

There are a lot of customization options that we will cover, but some that we won't have the time to cover today. My goal is to show you what some of the possibilities are. What you can do with the customization features is only limited by your imagination and creativity.

SAID = SuiteAnswers article ID

Go to SuiteAnswers and search for the ID number

I recommend you follow along in your NetSuite account if you can.



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**CUSTOM FIELDS**

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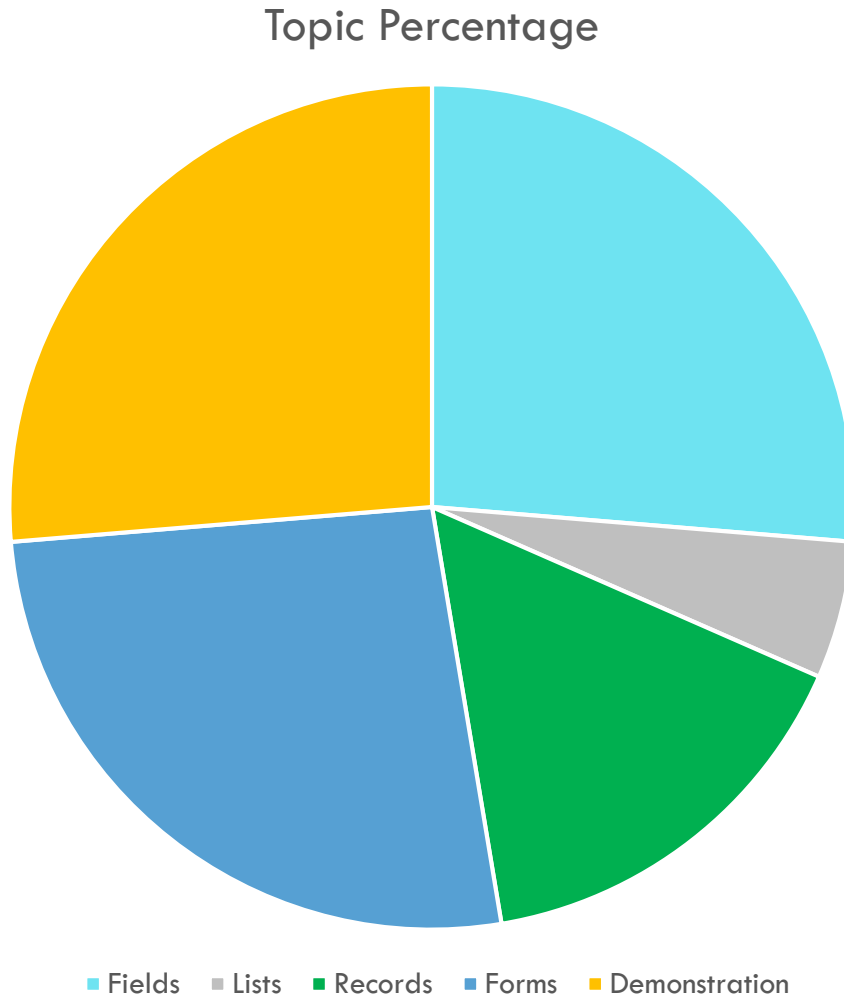
**CUSTOM FORMS**

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**CUSTOM RECORDS**



# CUSTOMIZATIONS: WHAT TO EXPECT





# CUSTOM FIELDS

# KINDS OF CUSTOM FIELDS — SAID 10092

- **Custom Entity Fields** — Used to add fields to entity records. These records include Relationship and Employee records — such as customers, vendors, employees, contacts, partners or groups.
- **Custom Item Fields** — Used to add fields to item records. These records include Accounting and website item records — such as inventory, non-inventory, service, other charge, group, kit/package and assembly/bill of materials item records.
- **Custom Transaction Body Fields** — Used to add fields to the body of transaction records. These records include purchase, sale, journal entry and expense report records — such as sales orders, invoices, purchase orders, opportunities, Web store transactions or item receipts.
- **Custom Transaction Line Fields** — Used to add fields to the columns of transaction records. These fields display in the line-item columns of transaction records and include fields such as expense items, purchase items, sales items, store items or opportunity items. (aka Custom Columns)

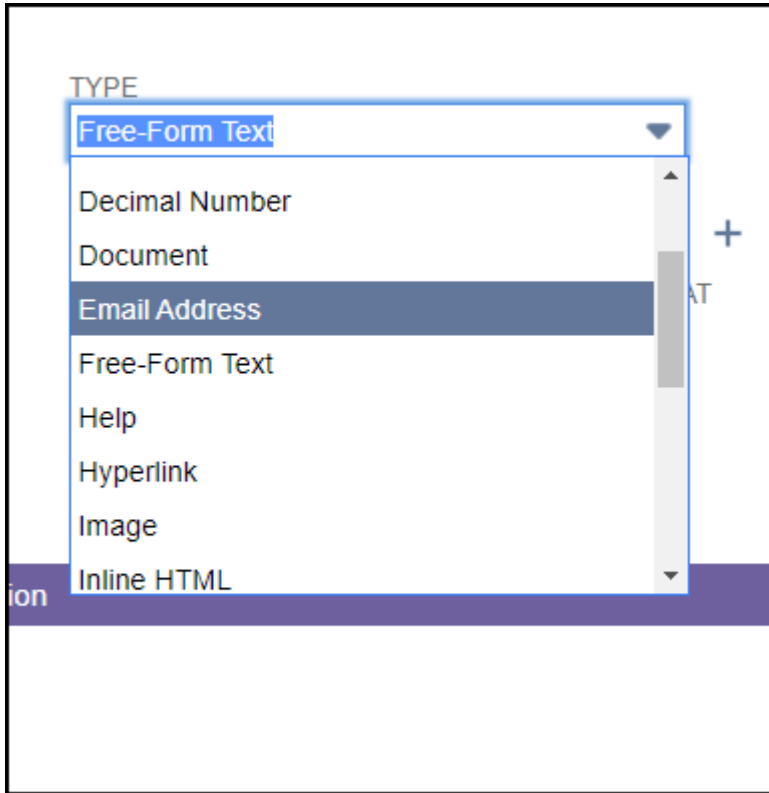
# KINDS OF CUSTOM FIELDS — SAID 10092

- **Custom CRM Fields** — Used to add fields to CRM records. These records include Activity, Marketing and Support records — such as tasks, events, campaigns or cases.
- **Custom Transaction Item Options** — Used to add fields to the line items of your transaction records such as purchase items, sales items and Web store items. When adding a custom field to the line items of a transaction, you apply the field to the type of line item.
- **Custom Item Number Fields** — Used to add fields to serial and lot numbered inventory records to track information specific to each item or workflow unique to your business. For example, quality control procedures or recall information could be tracked.
- **Other Record Fields** — Used to add fields to custom records not defined by the above categories, including campaign events, classes, competitors, departments, and locations.



# CUSTOM FIELDS: COMMONLY USED TYPES

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SAID 10085 – Table of Custom  
Field Type Descriptions

- Checkbox
- Date
- Currency
- Integer Number
- Decimal Number
- List/Record
- Free-Form Text
  - Up to 300 characters
- Text Area
  - Up to 4,000 characters
- Rich Text
  - Up to 100,000 characters
- Long Text
  - Up to 1,000,000 characters



# CUSTOM FIELDS: BEST PRACTICES

**Custom Entity Field**

Save ▼ Cancel Reset | Apply to Forms

LABEL \*

ID

OWNER  
Cory Anderson ▼ ↗

DESCRIPTION

**Applies To** | Display | Validation & Defaulting | Sourcing & Filtering | A

<input type="checkbox"/> CUSTOMER	<input type="checkbox"/> CONTACT
<input type="checkbox"/> PROJECT	<input type="checkbox"/> PARTNER
<input type="checkbox"/> VENDOR	<input type="checkbox"/> GENERAL
<input type="checkbox"/> EMPLOYEE	<input type="checkbox"/> WEB SITE
<input type="checkbox"/> OTHER NAME	<input type="checkbox"/> GROUP

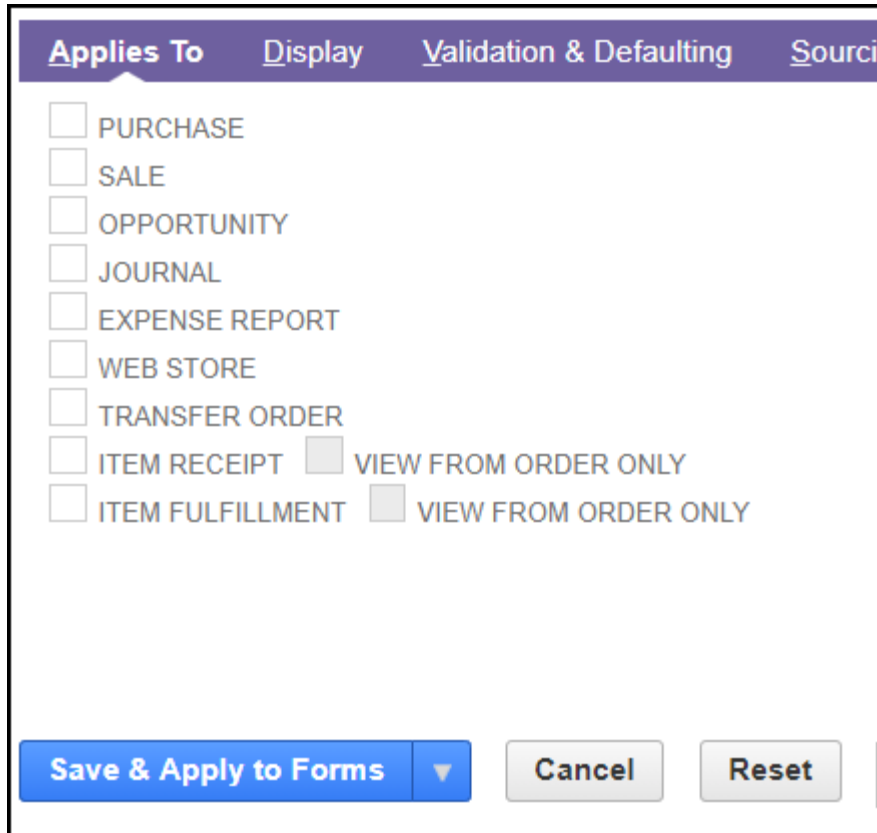
Save ▼ Cancel Reset | Apply to Forms

**Translation**

HELP

- Understand the field type thoroughly before choosing
  - What type of data is needed?
  - How will the data be used?
  - Choose wisely, changing the field type will erase all data in the field on records
- Fill in the values
  - Label
  - Internal ID
    - `_example_label`
  - Description (internal use)
  - Help (external use)
- Apply to forms

# CUSTOM FIELDS: APPLIES TO



The screenshot shows a configuration window with a purple header bar containing four tabs: 'Applies To' (selected), 'Display', 'Validation & Defaulting', and 'Source'. Below the header, there is a list of transaction types, each with an unchecked checkbox: PURCHASE, SALE, OPPORTUNITY, JOURNAL, EXPENSE REPORT, WEB STORE, TRANSFER ORDER, ITEM RECEIPT, and ITEM FULFILLMENT. To the right of 'ITEM RECEIPT' and 'ITEM FULFILLMENT' are smaller checkboxes labeled 'VIEW FROM ORDER ONLY'. At the bottom of the window, there are three buttons: 'Save & Apply to Forms' (blue), 'Cancel' (grey), and 'Reset' (grey).

- Different options will show depending on the Kind of field
- Choose the record type you want to add the field to
- You can add or remove options later
- Best Practice
  - Use the 'Apply to Forms' feature to control exactly where the field will show
- 'Apply to Forms' will also help you see the related transaction types such as a Cash Sale when choosing 'Sale'

# CUSTOM FIELDS:

## DISPLAY SAID 10097

OWNER  
Cory Anderson

Applies To **Display** Validation & Defaulting Source

INSERT BEFORE  
- Unchanged -

SUBTAB  
[Empty dropdown]

DISPLAY TYPE  
Normal

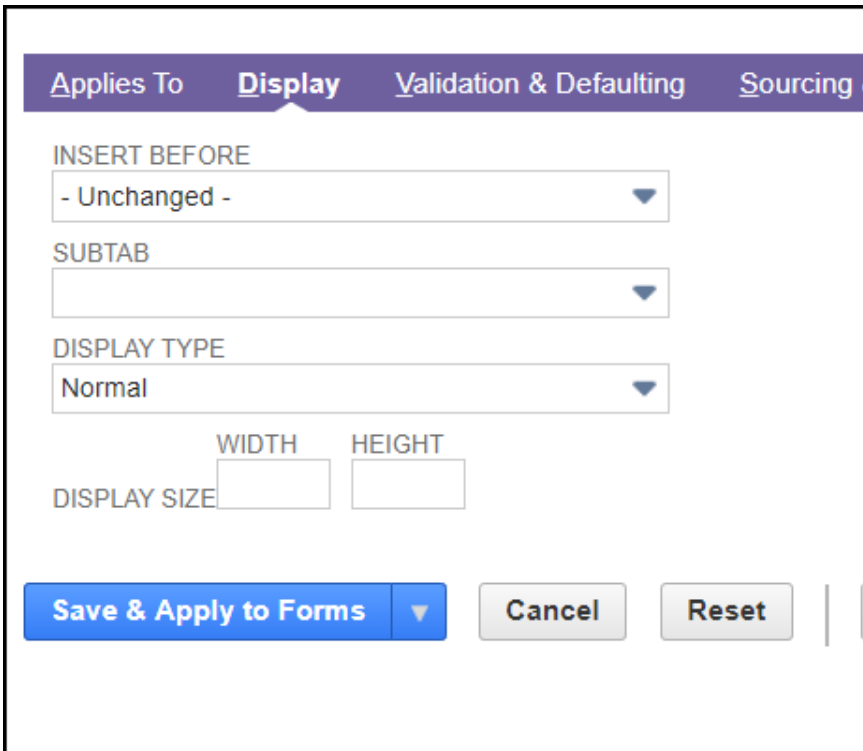
DISPLAY WIDTH [Empty input box]

Save & Apply to Forms [Dropdown arrow] Cancel Reset

- **Insert Before**
  - Defines where the field is placed on records
- **Subtab**
  - The subtab where the field will appear by default
- **Display Type**
  - **Normal** – can be edited
  - **Inline Text** – not editable, can be populated via calculation etc . . .
  - **Disabled** – cannot be edited, will not display if no data in field
  - **Hidden** – cannot be seen on form, but not to be used for field level security

# CUSTOM FIELDS:

## DISPLAY SAID 10097



The screenshot shows a configuration interface for a custom field, specifically the 'Display' tab. The interface has a purple header bar with four tabs: 'Applies To', 'Display' (which is selected), 'Validation & Defaulting', and 'Sourcing & Calculated'. Below the header, there are three dropdown menus: 'INSERT BEFORE' with the value '- Unchanged -', 'SUBTAB' which is currently empty, and 'DISPLAY TYPE' with the value 'Normal'. Below these dropdowns, there are two input fields labeled 'WIDTH' and 'HEIGHT' under the heading 'DISPLAY SIZE'. At the bottom of the form, there are three buttons: a blue 'Save & Apply to Forms' button with a dropdown arrow, a grey 'Cancel' button, and a grey 'Reset' button.

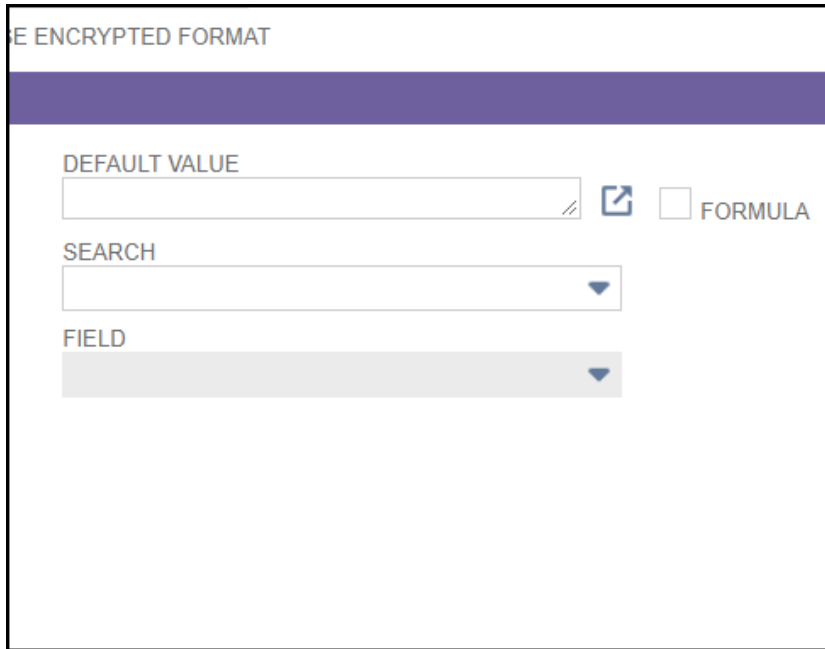
- Display Size
  - Width and Height options show depending on the field type such as text area field types
- Help
  - Fill this in with details about the field such as the purpose of the data and how it is sourced or calculated

# CUSTOM FIELDS: VALIDATION AND DEFAULTING

- The options here depend on the field type
- **Mandatory**
  - Makes the field required on the forms it applies to
  - Alternate option to modify a specific form to make a field required
- **Some common options**
  - Maximum Length
  - Minimum Value
  - Maximum Value

The screenshot shows a configuration window with a purple header bar containing four tabs: 'Applies To', 'Display', 'Validation & Defaulting' (which is selected), and 'Source'. Below the header, there are three options with checkboxes: 'MANDATORY', 'CHECK SPELLING', and 'MAXIMUM LENGTH'. The 'MANDATORY' checkbox is checked. Below these options is a text input field. At the bottom of the window, there are three buttons: 'Save & Apply to Forms' (a blue button with a dropdown arrow), 'Cancel', and 'Reset'.

# CUSTOM FIELDS: VALIDATION AND DEFAULTING



The screenshot shows a configuration window for a custom field. At the top, there is a header bar with the text "E ENCRYPTED FORMAT" on the left and a purple bar on the right. Below the header, the "DEFAULT VALUE" section contains a text input field, a small icon of a document with a checkmark, and a checkbox labeled "FORMULA". The "SEARCH" section contains a dropdown menu. The "FIELD" section contains a dropdown menu.

- **Default Value**
  - Can be static or a calculation using the formula field
  - This value can be seen on Saved Search results and used in Workflows
- **Search**
  - Can define the results from a Saved Search calculation
  - Much more powerful than the Formula option
  - This value can not be seen on Saved Search results or used in Workflows unless it is stored

[www.RMNSUG.org/posts](http://www.RMNSUG.org/posts)  
Search for “Dynamic Field”

# CUSTOM FIELDS: SOURCING AND FILTERING

Allows you to source the contents of a custom field from a related record. This example sources the Country from the Customer record on a transaction.

### Transaction Body Field

Save & Apply to Forms

Cancel

Reset

Apply to Forms

LABEL \*

Customer's Country

ID

\_customer\_country

OWNER

Cory Anderson

DESCRIPTION

This sources the Country from the Customer record.

TYPE

Free-Form Text

LIST/RECORD

☒ STORE VALUE

☐ USE ENCRYPTED FORMAT

☐ SHOW IN LIST

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

Translation

SOURCE LIST

Customer

SOURCE FROM

Country (Name)

Save & Apply to Forms

Cancel

Reset

Apply to Forms

# CUSTOM FIELDS: ACCESS

Access gives you the ability to control who can see and/or edit this field. You can restrict by Role, Department, or Subsidiary.

Can be used to control access to sensitive information, or fields that only apply to specific people in your company.

The screenshot shows the 'Access' tab of a configuration interface. At the top, there are tabs: 'Applies To', 'Display', 'Validation & Defaulting', 'Sourcing & Filtering', 'Access' (selected), and 'Translation'. Below these, there are two dropdown menus: 'DEFAULT ACCESS LEVEL' and 'DEFAULT LEVEL FOR SEARCH/REPORTING', both set to 'Edit'. Below these is a table with columns: 'Role', 'Department', 'Subsidiary', 'ROLE \*', 'ACCESS LEVEL \*', and 'LEVEL FOR SEARCH/REPORTING \*'. The 'ROLE \*' column has a dropdown menu and a link icon. Below the table are buttons: 'Add', 'Cancel', 'Insert', and 'Remove'. At the bottom, there are buttons: 'Save & Apply to Forms', 'Cancel', 'Reset', and 'Apply to Forms'.

Role	Department	Subsidiary	ROLE *	ACCESS LEVEL *	LEVEL FOR SEARCH/REPORTING *

Handy for testing new fields too . . .



# Demonstration Time

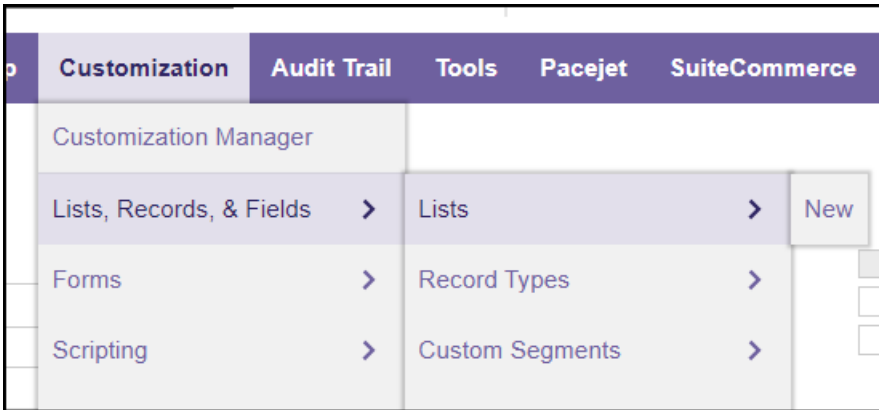




# CUSTOM LISTS

# CUSTOM LISTS

- Used to create a custom field with pre-determined value options
- Maintains uniformity in data
- Allows you to use the values to trigger other actions such as workflows



**Custom List**

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

NAME \*  
Customer Type

ID  
\_customer\_type

OWNER  
Cory Anderson

DESCRIPTION  
Describes the customer type which determines how we do business with them.

**Values** Translation •

VALUE \*  
Wholesale  
Retail  
Independent Sales Rep  
Third Party

**Add** **Cancel** **Insert** **Remove**

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



# Demonstration Time





# **CUSTOM FORMS**

# CUSTOM FORM TYPES

Forms are the pages used to enter information into the NetSuite database. There are two main form types:

## Entry Forms

- Used for record types that are not transactions
- Items, customers, vendors, employees etc . . .

## Transaction Forms

- Used for all transaction record types
- Sales Orders, Item Fulfillments, Invoices, Bills, Journal Entries etc . . .

# CUSTOM FORMS: BEST PRACTICES

**Custom Transaction Forms**

[Submit](#)

[+ FILTERS](#)

  |  | ☐ SHOW INACTIVES

EDIT	INTERNAL ID	NAME
<a href="#">Customize</a>	20	<a href="#">Standard Assembly Build</a>
<a href="#">Edit</a>	146	<a href="#">Primary Assembly Build</a>
<a href="#">Edit</a>	268	<a href="#">Primary WO Build</a>
<a href="#">Edit</a>	422	<a href="#">GB - Assembly Build</a>
<a href="#">Customize</a>	21	<a href="#">Standard Assembly Unbuild</a>
<a href="#">Edit</a>	270	<a href="#">Primary Assembly Unbuild</a>
<a href="#">Edit</a>	423	<a href="#">GB - Assembly Unbuild</a>
<a href="#">Customize</a>	50	<a href="#">Standard Vendor Bill</a>
<a href="#">Edit</a>	288	<a href="#">Primary Vendor Bill + Amortization</a>
<a href="#">Edit</a>	385	<a href="#">Primary Vendor Bill</a>
<a href="#">Edit</a>	386	<a href="#">Primary Vendor Bill + Landed Cost</a>

- Create custom forms for all your common record types
  - Start with the pre-built form, make a new version and customize
- Remove fields that are not used in your business processes
  - The goal should be to have clean, uncluttered information
- Naming convention should be consistent
  - i.e. ACME Sales Order, ACME Purchase Order, ACME Customer

# CUSTOM FORMS: SETTINGS

- ☒ ENABLE FIELD EDITING ON LISTS
- ☐ STORE FORM WITH RECORD
- ☐ FORM IS PREFERRED
- ☐ USE FOR POP-UPS ☐ POPUP ONLY

- **Store Form With Record**
  - This ensures that your records are viewed and edited with this form regardless of who is viewing or editing the record
- **Form Is Preferred**
  - This will be the default form that is used, unless forms are set at the role level
- **Use For Pop-Ups**
  - Use this form in popups when you add a record of this type from another record.



# CUSTOM FORMS: SETTINGS

- **Field Groups**
  - The field grouping that you will see on a record
  - The first subtab here represents the subtab, and then below that are the groups, if any

## Custom Entry Form

Save

Cancel

Reset

Save & Move Elements

Save & Edit

Gill Customer Form

ID

\_gill\_customer

TYPE

Entity

SUBTYPE

Customer/Lead/Prospect

☐ INACTIVE

Subtabs Field Groups Fields Actions Sublists QuickView

Main • Relationships Sales Marketing • Financial • Preference

LABEL \*

Primary Information

Customer

Tom Dale Tom Dale

Edit

Back

Accept Payment



Actions

Primary Information

CUSTOMER ID

Tom Dale

MR./MS...

NAME

Tom Dale

JOB TITLE

COMPANY NAME

Tom Dale

Email | Phone | Address

EMAIL

# CUSTOM FORMS: SETTINGS

Subtabs   Field Groups <b>Fields</b> Actions   Sublists   QuickView   Custom Code   Roles					
Main • Relationships • Sales • Marketing • Financial • Preferences • System Information • C					
Move To Top   Move To Bottom   New Field					
DESCRIPTION	SHOW	QUICK ADD	MANDATORY	DISPLAY	
Custom Form	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Normal	
Name/ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Normal	
Auto Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Name (when Numbered)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Inline Text	
Type	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Mr./Ms...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Furigana	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Job Title	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Company Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	
Parent	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Normal	
Probability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Sales Rep	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Partner	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	
Web Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	
Category	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Normal	

- **Fields**
  - All the fields that are either showing on the form, or available to be visible on the form. This is where you can disable fields from showing on the form.
  - This is also where you organize the fields and group them appropriately
  - Can choose to make fields mandatory and set the display type. Display types are same as we've already discussed.
  - All field settings will only apply to this form.

# CUSTOM FORMS: SETTINGS

Subtabs Field Groups Fields **Actions** Subli

Standard Actions • Custom Actions

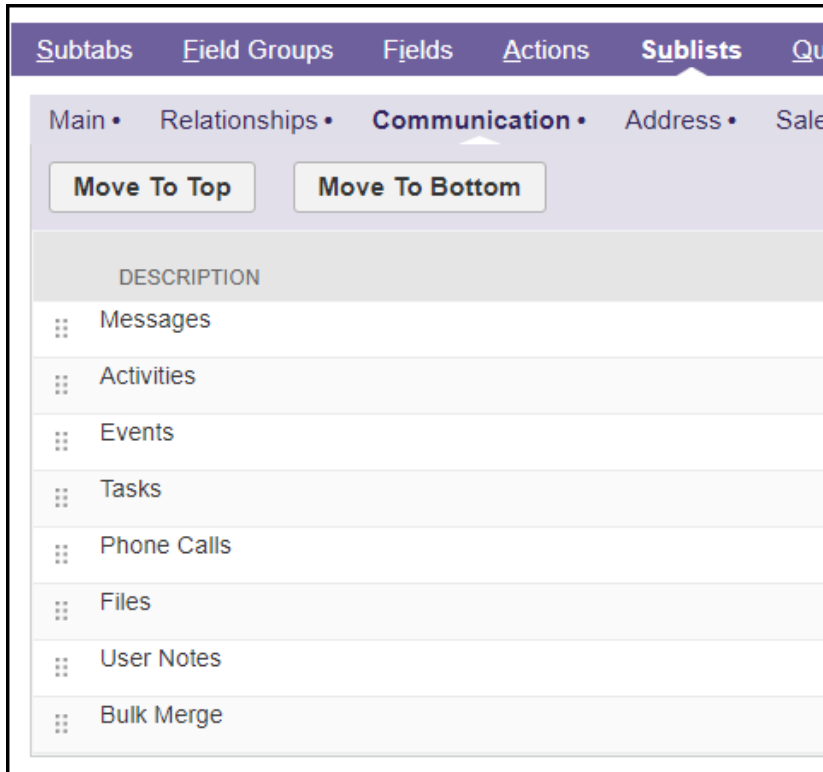
The following buttons are not supported in point-and-click customization or in

ACTION NAME ▲
Accept Payment
Delete
Generate Price List
Generate Statement
Make Copy
Merge
New
Save & New
Save & Next
Save As
Search

- **Actions**
  - Determines the actions that can be performed by users when viewing a record that uses this form
  - Can be set to shown as a Button or in the Actions drop-down menu

	SHOW	DISPLAY AS
	<input checked="" type="checkbox"/>	Button ▼
	<input checked="" type="checkbox"/>	Menu ▼
	<input checked="" type="checkbox"/>	Menu ▼
	<input checked="" type="checkbox"/>	Menu ▼
	<input checked="" type="checkbox"/>	Menu ▼
	<input checked="" type="checkbox"/>	Button ▼
	<input checked="" type="checkbox"/>	Menu ▼
	<input checked="" type="checkbox"/>	Menu ▼

# CUSTOM FORMS: SETTINGS



The screenshot shows the 'Sublists' tab in the Custom Forms Settings interface. The top navigation bar includes 'Subtabs', 'Field Groups', 'Fields', 'Actions', 'Sublists', and 'Qu'. Below the navigation bar, there is a breadcrumb trail: 'Main • Relationships • Communication • Address • Sale'. Two buttons, 'Move To Top' and 'Move To Bottom', are visible. The main content area is a table with a header 'DESCRIPTION' and a list of sublists: Messages, Activities, Events, Tasks, Phone Calls, Files, User Notes, and Bulk Merge. Each sublist has a small icon to its left.

DESCRIPTION
Messages
Activities
Events
Tasks
Phone Calls
Files
User Notes
Bulk Merge

- Sublists
  - Determines which sublists are available on the form
  - Examples: Relationships, Communication, Addresses, Related Records etc . . .

# CUSTOM FORMS: SETTINGS

Screen Email Template

Tab Field Groups Screen Fields Actions Sublists **Sublist Fields**

ITEM FILTER

Move To Top Move To Bottom New Field

	LABEL	SHOW	DESCRIP
⋮	Project	<input type="checkbox"/>	Job
⋮	Item	<input checked="" type="checkbox"/>	Item
⋮	Committed	<input checked="" type="checkbox"/>	Committed
⋮	Fulfilled	<input checked="" type="checkbox"/>	Total To D
⋮	Back Ordered	<input checked="" type="checkbox"/>	Back Order
⋮	Available	<input type="checkbox"/>	Available
⋮	Average Cost	<input type="checkbox"/>	Average C
⋮	Last Purchase Price	<input type="checkbox"/>	Last Purch
⋮	On Hand	<input type="checkbox"/>	On Hand
⋮	Quantity	<input checked="" type="checkbox"/>	Quantity
⋮	Units	<input checked="" type="checkbox"/>	Units
⋮	Inventory Detail	<input checked="" type="checkbox"/>	Inventory

- Sublist Fields
  - Here you can rename or change the visibility of sublist fields on the form
  - For Entry forms, the sublist fields show in the Fields subtab
  - For Transaction forms, the sublist fields show in the Sublist Fields subtab
- Item Filter
  - This allows you to choose a Saved Search that will limit the items that are available to be used with this form

# CUSTOM FORMS: PRINTING FIELDS

- Only shows when Basic printing type is selected
- Choose the fields that will print by section
  - Header
  - Footer
  - Body
  - Columns

Header •	Footer •	Body •	Columns •
DESCRIPTION	PRINT/EMAIL	LABEL	
Company Name	<input type="checkbox"/>		
Company Logo	<input checked="" type="checkbox"/>		
Company Address	<input checked="" type="checkbox"/>		
Company Phone	<input type="checkbox"/>		
Company URL	<input type="checkbox"/>		
Business Number	<input type="checkbox"/>	Tax ID #	
Form Title	<input checked="" type="checkbox"/>	Sales Order	
Page Number	<input checked="" type="checkbox"/>	Page {1} of {2}	
Acct. No.	<input type="checkbox"/>	Acct. No.	
Date	<input checked="" type="checkbox"/>	Order Date	
Doc. No.	<input checked="" type="checkbox"/>	Sales Order #	
Bill To	<input checked="" type="checkbox"/>	Bill To	
Ship To	<input checked="" type="checkbox"/>	Ship To	

# CUSTOM FORMS: SETTINGS

<u>C</u> ustom Code	<u>R</u> oles	<u>L</u> inked Forms
CUSTOM FORM		
	GB - Cash Sales	▼
	GB - Invoices	▼
	GB - Item Fulfillment	▼
	Primary Packing Slip	▼
	B2C Picking Ticket	▼
	LS Purchase Order	▼
		▼
		▼
		▼
		▼

- Linked Forms
  - Only applies to transaction forms
  - You can determine the forms that will be used automatically with related records when a transaction starts with this form

# Demonstration Time






# CUSTOM FORMS: PRINTING

## Custom Transaction Form

**Save** ▼ **Cancel** **Reset** | **Save & Mo**

NAME \*  
 

ID

TYPE  
Sales Order

PRINTING TYPE ☒ ADVANCED ☐ BASIC

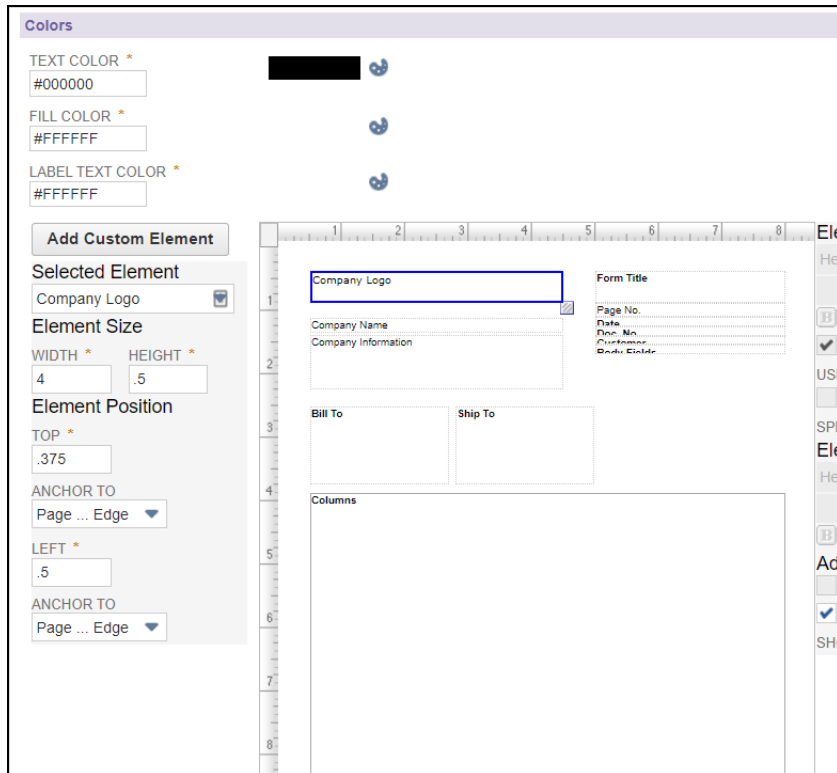
PRINT TEMPLATE  
 ▼

EMAIL TEMPLATE  
 ▼

EMAIL MESSAGE TEMPLATE  
 ▼

- Applies to transaction forms only
- Choose from Advanced or Basic printing type
- Basic is enabled by default on all transaction forms

# CUSTOM FORMS: BASIC PRINTING



- Transaction Form PDF Layouts
- WYSIWYG style editor to modify the forms
- You can add or remove elements and change the layout
- Limited functionality

# CUSTOM FORMS: ADVANCED PDF/HTML LAYOUTS

- WYSIWYG style editor to modify the forms
- Also code-based editor to give full control of the layout
  - Uses FreeMarker language
- Very flexible and very customizable

Advanced PDF/HTML Template  
Custom Sales Order PDF/HTML Template

Save Template Setup Cancel

New Element Styles Source Code Preview

+

T

Image

Table

<2>

<#>

File

Print

Form

Form

Company Name Address		Title #Sales Order # Order Date	
Bill To	Ship To	Total	
Bill To	Ship To	Total	
Payment Method	Cust PO #	Shipping Method	Required Date
Payment Method	Cust PO #	Shipping Method	Required Date
Qty	Item	Price	Amount
Qty	Item Description	Price	Amount

# Demonstration Time





# **CUSTOM RECORDS**

# CUSTOM RECORDS - SAID 10140

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Custom Records allow you to collect and track information in your account. They are used to bridge any gaps that NetSuite might have to help you with your specific business needs.

Examples:


- Rejection Record
- Employee Training Courses
- Customer Survey
- Events

Other examples?

# CUSTOM RECORDS: BEST PRACTICES


**Custom Record Type**


**Save** ▼ **Cancel** **Reset**

NAME \*  
Rejection Record 

ID  
\_rejection\_record

ORIGINATING CUSTOM SEGMENT

OWNER  
Cory Anderson ▼ 

DESCRIPTION  
This is used to log a rejection message in tandem with approval processes. 

☒ INCLUDE NAME FIELD  
☐ SHOW ID

SHOW CREATION DATE ☐ ON RECORD ☐ ON LIST  
SHOW LAST MODIFIED ☐ ON RECORD ☐ ON LIST

**Subtabs** Sublists Icon • Numbering • Permissions L

TITLE \*

- Enter custom Internal ID
  - Example - \_rejection\_record
- Enter a Description
- Uncheck 'Include Name Field'
  - This field is required on new records when enabled
- Check 'Show ID'
  - This ensures that the unique system assigned ID number is visible and searchable
- Save, and then Edit to add fields

TYPE

List/Record

LIST/RECORD

Transaction

+

☒ STORE VALUE

☐ USE ENCRYPTED FORMAT

☐ SHOW IN LIST

☐ GLOBAL SEARCH

☒ RECORD IS PARENT

☐ INACTIVE

☐ APPLY ROLE RESTRICTIONS

# CUSTOM RECORDS: PARENT CHILD RELATIONSHIPS

- Custom records can be a Parent or a Child of another record
- Example: a Rejection Record would be a child of a Purchase Order
- The **key** is to create one field of List/Record type on the child record
  - Mark the option 'Record Is Parent'



# Demonstration Time





**THANK YOU!**

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[Technologyconsulting.eidebailly.com](http://Technologyconsulting.eidebailly.com)