NetSuite Implementation, Consulting, and Support

Oracle NetSuite North America Solution Provider
2020 Partner of the Year

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.

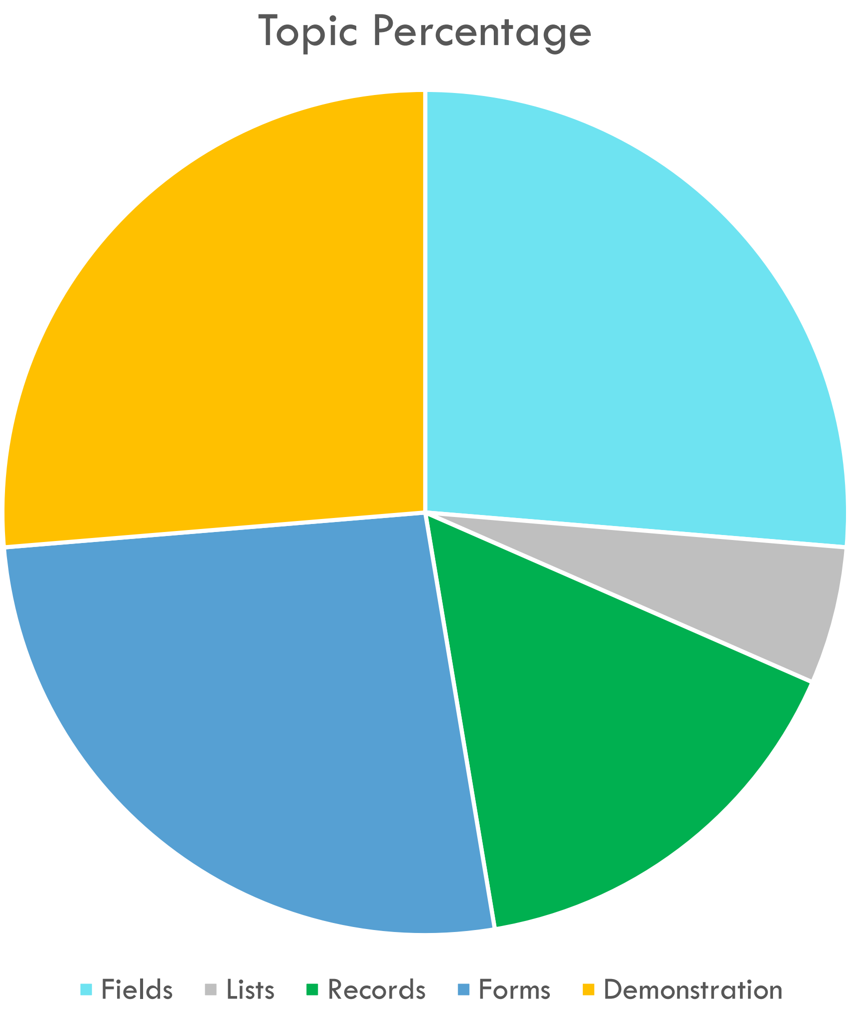
1 CUSTOM FIELDS

2 CUSTOM LISTS

3 CUSTOM FORMS

4 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)

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KINDS OF CUSTOM FIELDS – SAID 10092

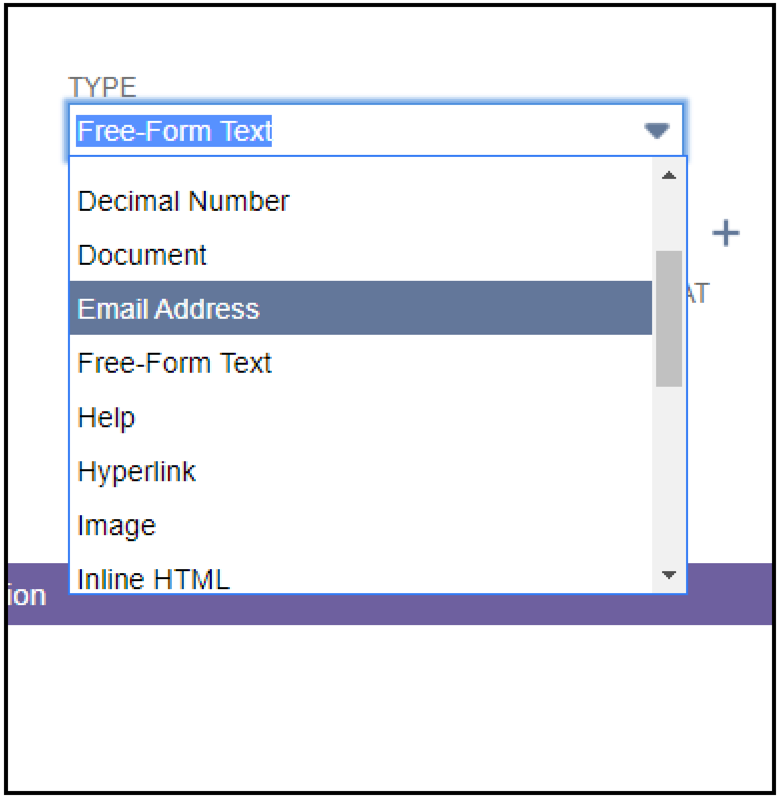
- **Custom CRM Fields** – Used to add fields to CRM records. These records include Activity, Marketing and Support records — such as tasks, events, campaigns or cases.

- **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.

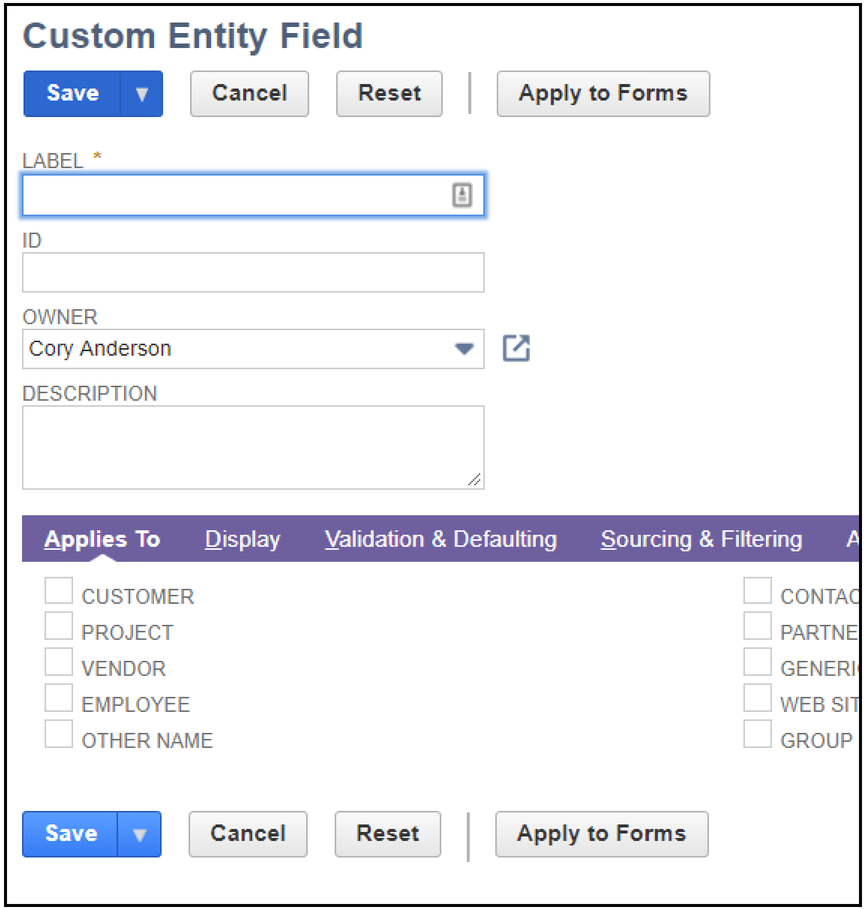
CUSTOM FIELDS: COMMONLY USED TYPES

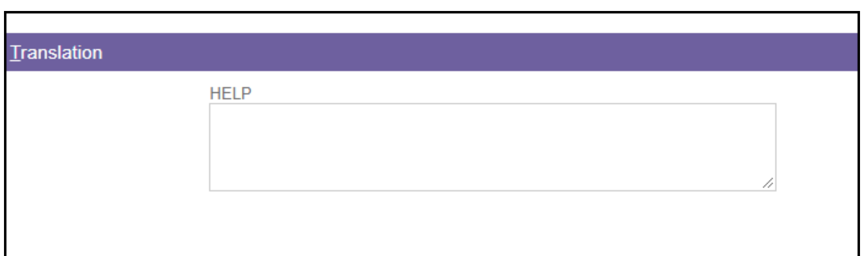


SAID 10085 – Table of Custom Field Type Descriptions

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

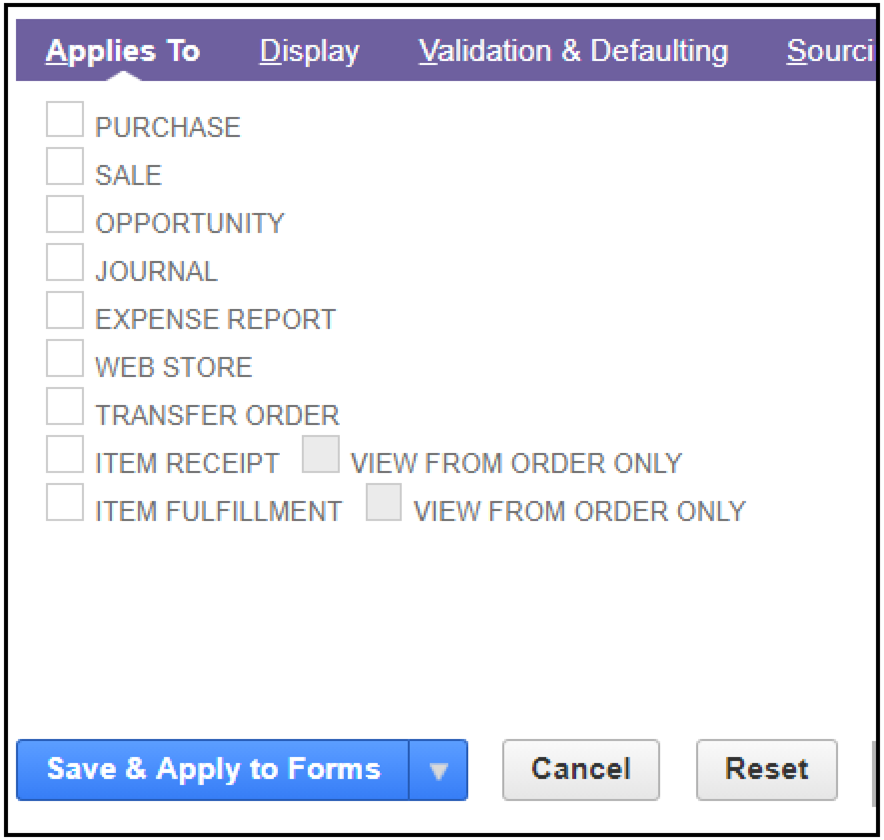
CUSTOM FIELDS: BEST PRACTICES





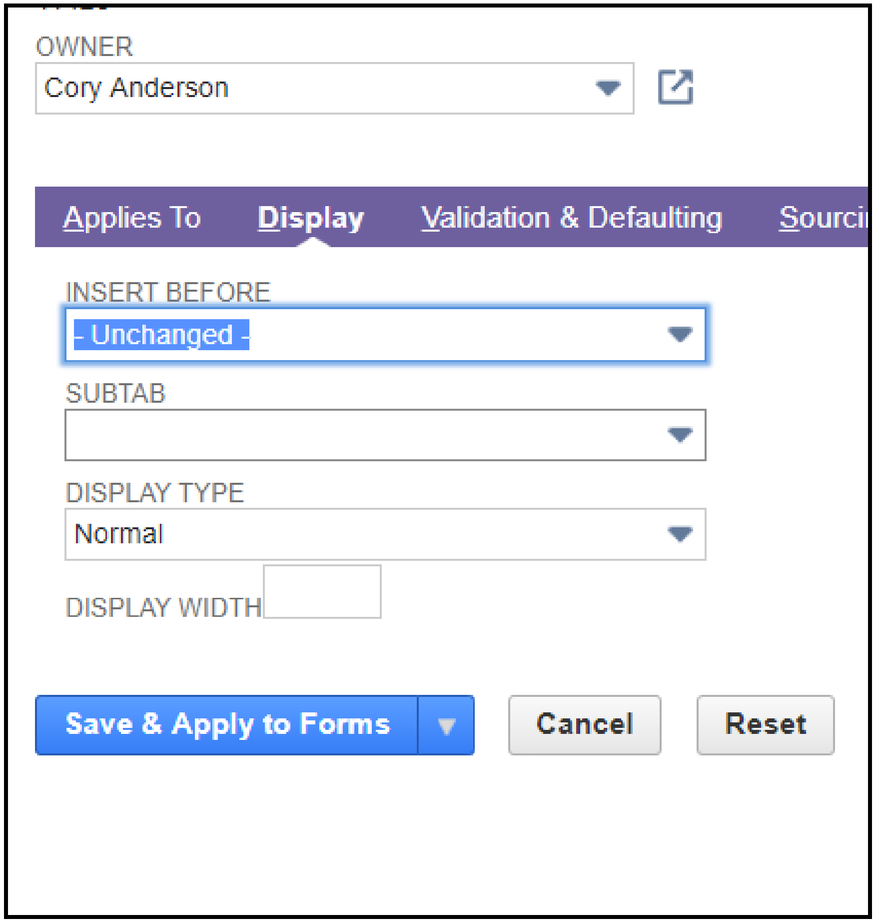
- Understand the field type thoroughly before choosing
  - What type of data is needed?
  - How will the data be used?
  - Choose wisely, changing the field type will erase all data in the field on records
- Fill in the values
  - Label
  - Internal ID
    - _example_label
  - Description (internal use)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

CUSTOM FIELDS: APPLIES TO



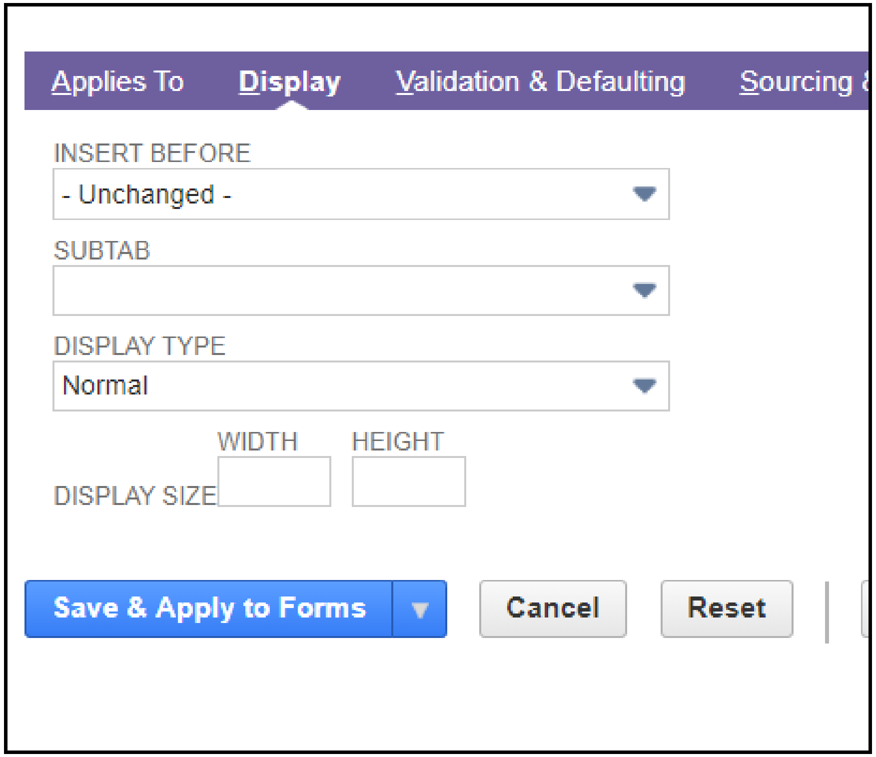
- Different options will show depending on the Kind of field
- Choose the record type you want to add the field to
- You can add or remove options later
- Best Practice
  - Use the 'Apply to Forms' feature to control exactly where the field will show
- 'Apply to Forms' will also help you see the related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

CUSTOM FIELDS: DISPLAY SAID 10097



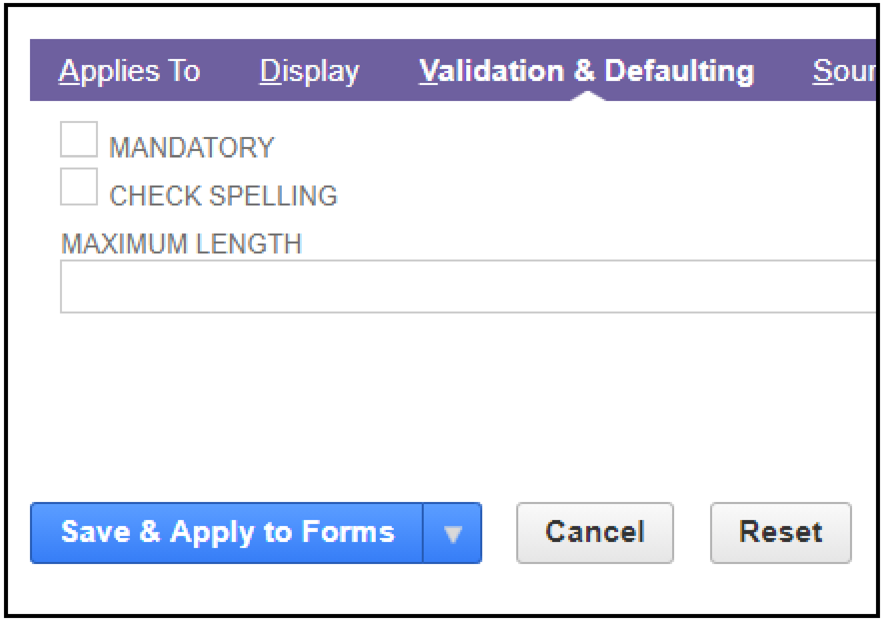
- Insert Before
  - Defines where the field is placed on records
- Subtab
  - The subtab where the field will appear by default
- Display Type
  - **Normal** – can be edited
  - **Inline Text** – not editable, can be populated via calculation etc . . .
  - **Disabled** – cannot be edited, will not display 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



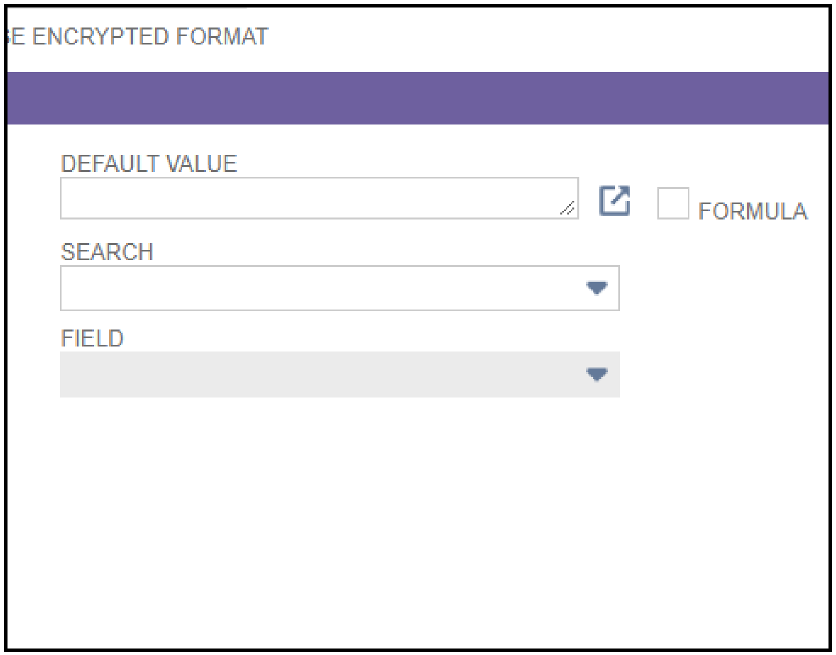
- Display Size
  - Width and Height options show depending on the field type such as text area field types
- Help
  - Fill this in with details about the field such as the purpose of the data and how it is sourced or calculated

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 filed required
- Some common options
  - Maximum Length
  - Minimum Value
  - Maximum Value

CUSTOM FIELDS: VALIDATION AND DEFAULTING

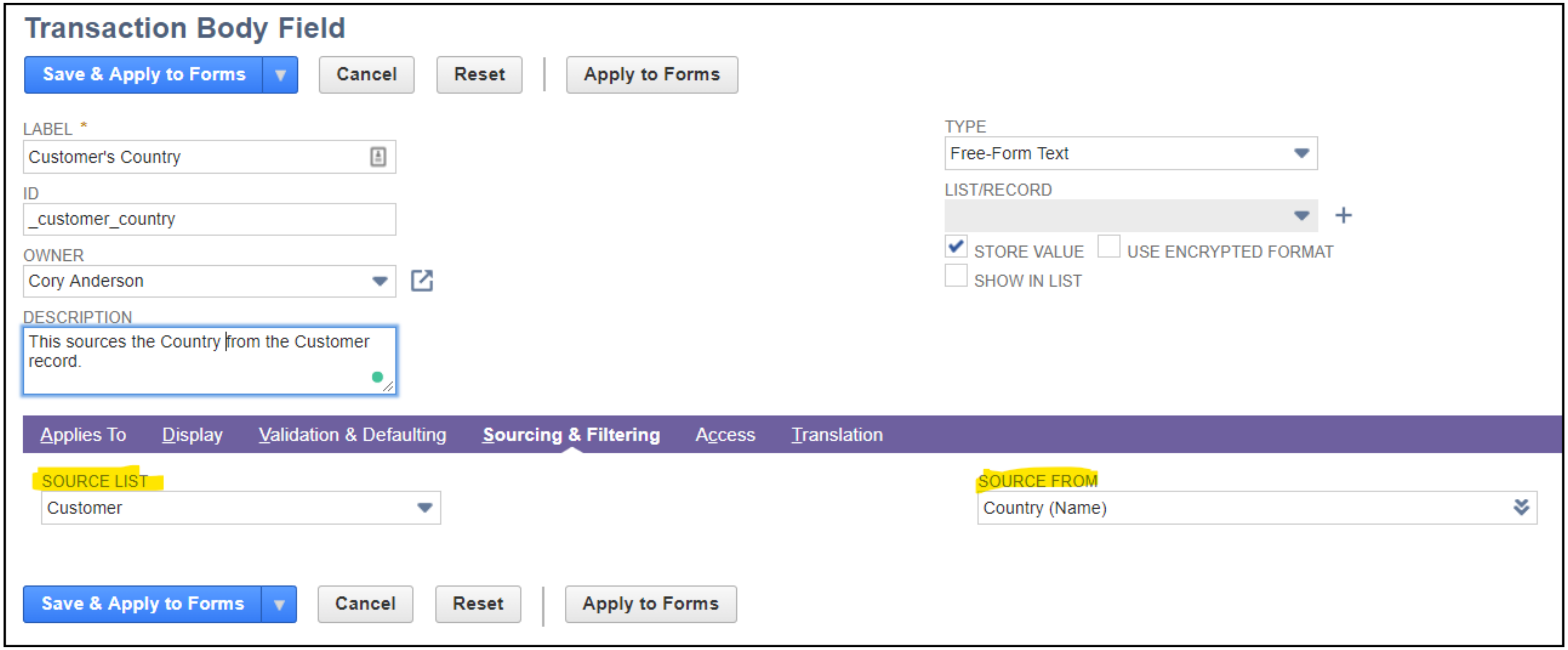


www.RMNSUG.org/posts
Search for "Dynamic Field"

- 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

CUSTOM FIELDS: SOURCING AND FILTERING

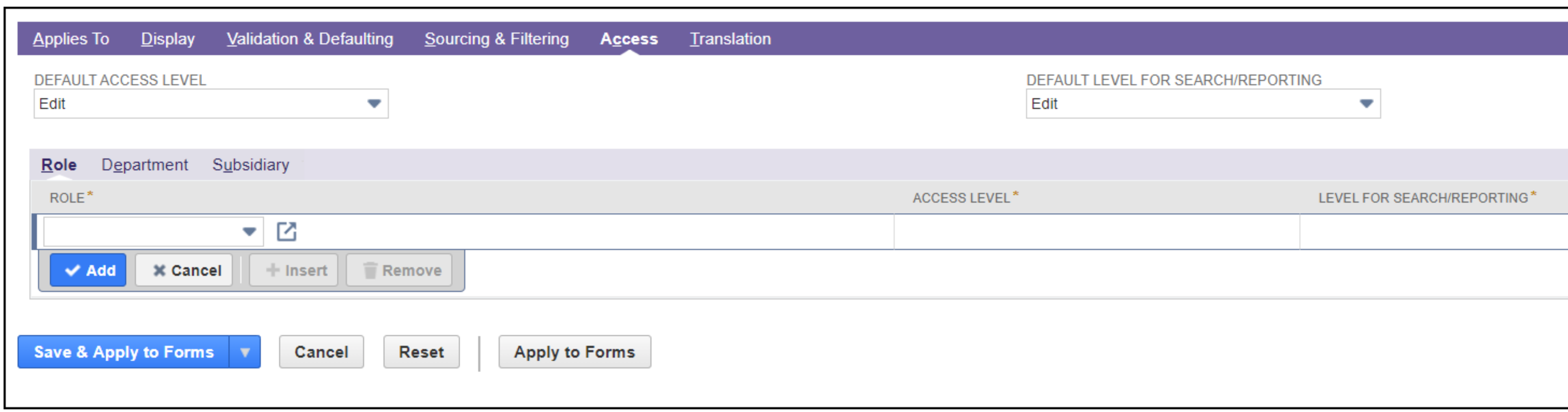
Allows you to source the contents of a custom field from a related record. This example sources the Country from the Customer record on a transaction.



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.

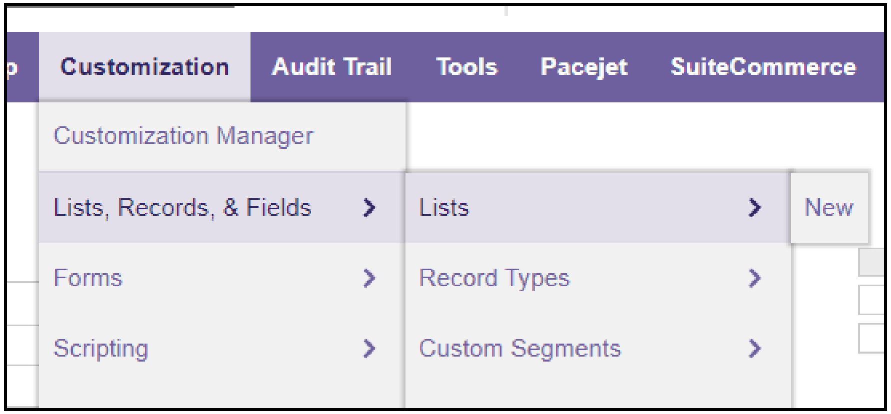


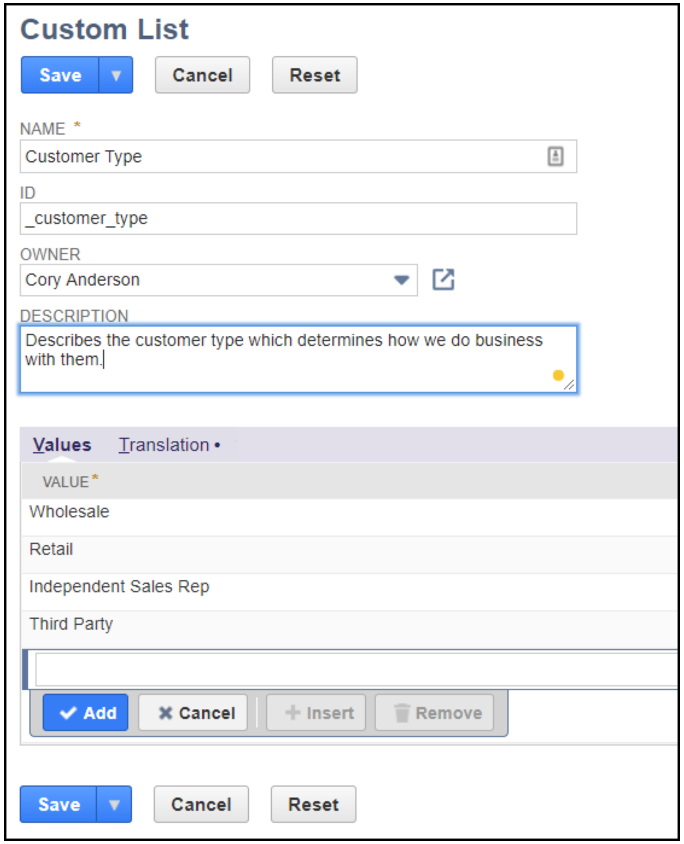
Handy for testing new fields too . . .


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


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:

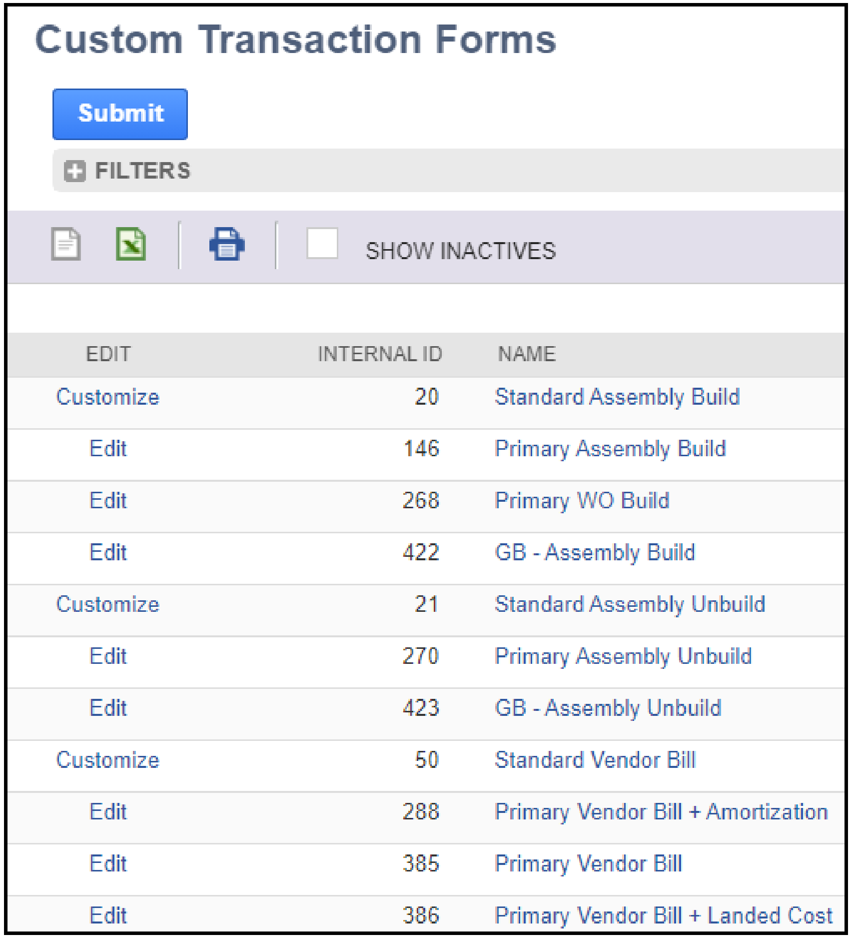
Entry Forms

- 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

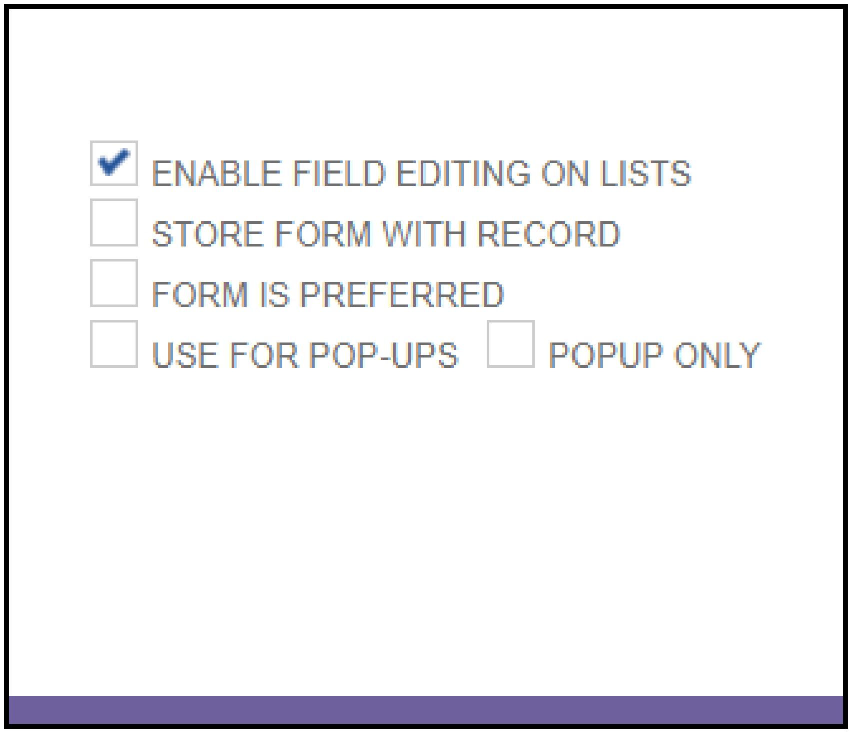
FILTERS

SHOW INACTIVES

EDIT	INTERNAL ID	NAME
Customize	20	Standard Assembly Build
Edit	146	Primary Assembly Build
Edit	268	Primary WO Build
Edit	422	GB - Assembly Build
Customize	21	Standard Assembly Unbuild
Edit	270	Primary Assembly Unbuild
Edit	423	GB - Assembly Unbuild
Customize	50	Standard Vendor Bill
Edit	288	Primary Vendor Bill + Amortization
Edit	385	Primary Vendor Bill
Edit	386	Primary Vendor Bill + Landed Cost

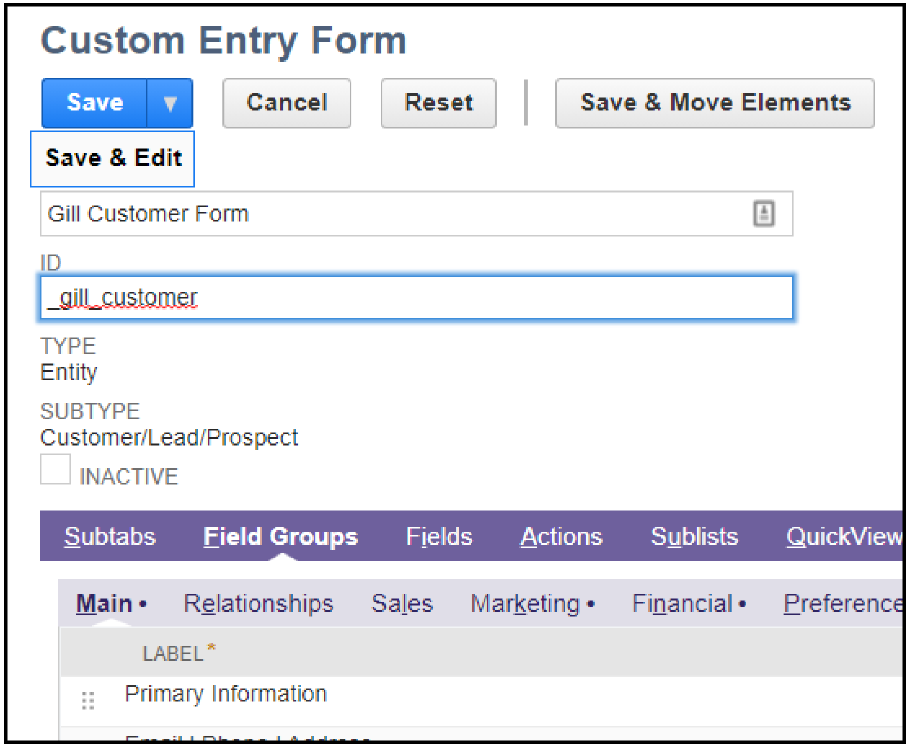
- Create custom forms for all your common record types
  - Start with the pre-built form, make a new version and customize
- Remove fields that are not used in your business processes
  - The goal should be to have clean, uncluttered information
- Naming convention should be consistent
  - i.e. ACME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

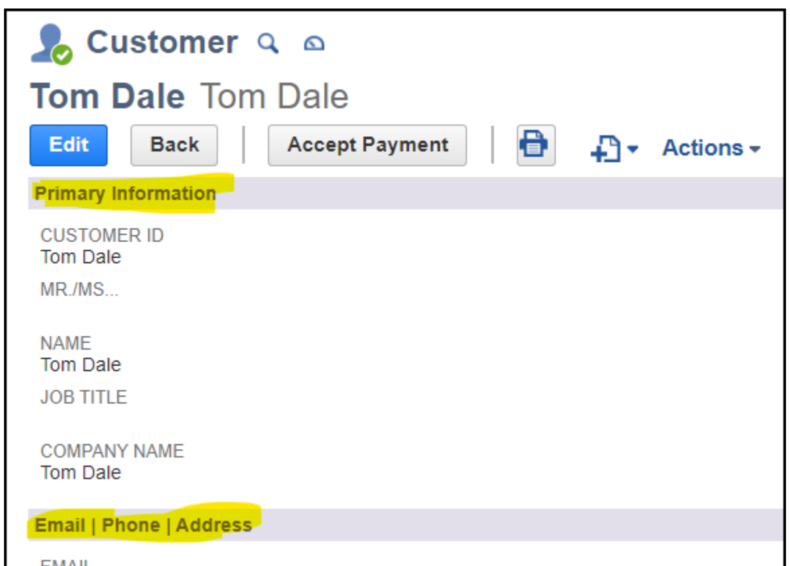
CUSTOM FORMS: SETTINGS



- 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.

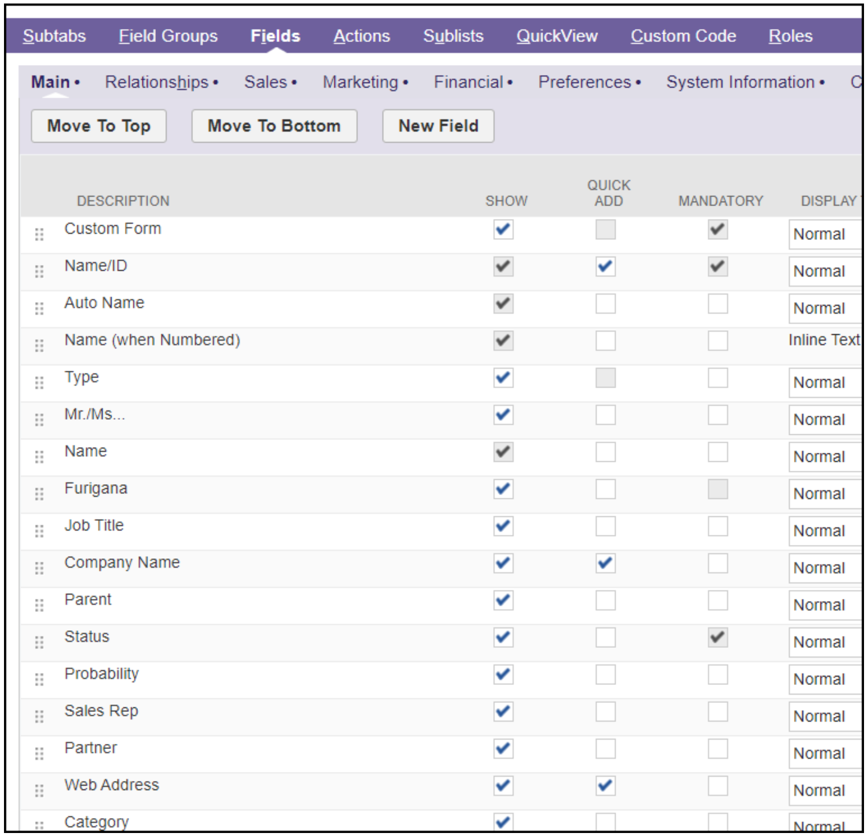
CUSTOM FORMS: SETTINGS





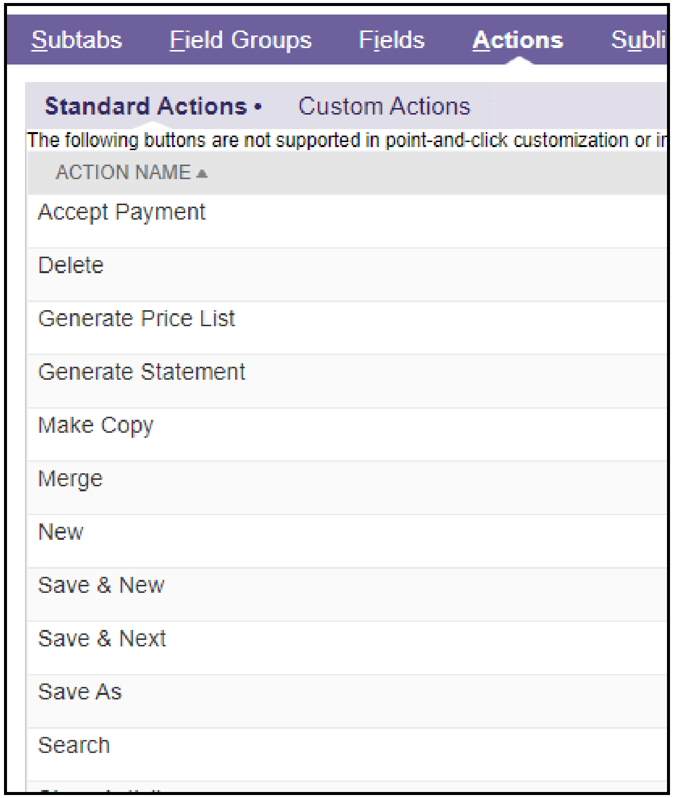
- Field Groups
  - The field grouping that you will see on a record
  - The first subtab here represents the subtab, and then below that are the groups, if any

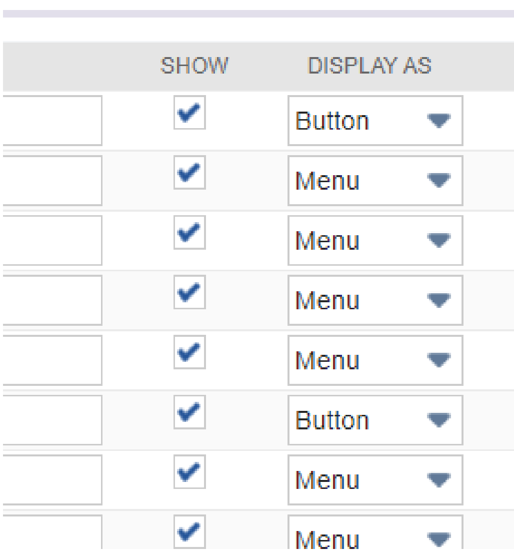
CUSTOM FORMS: SETTINGS



- 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.

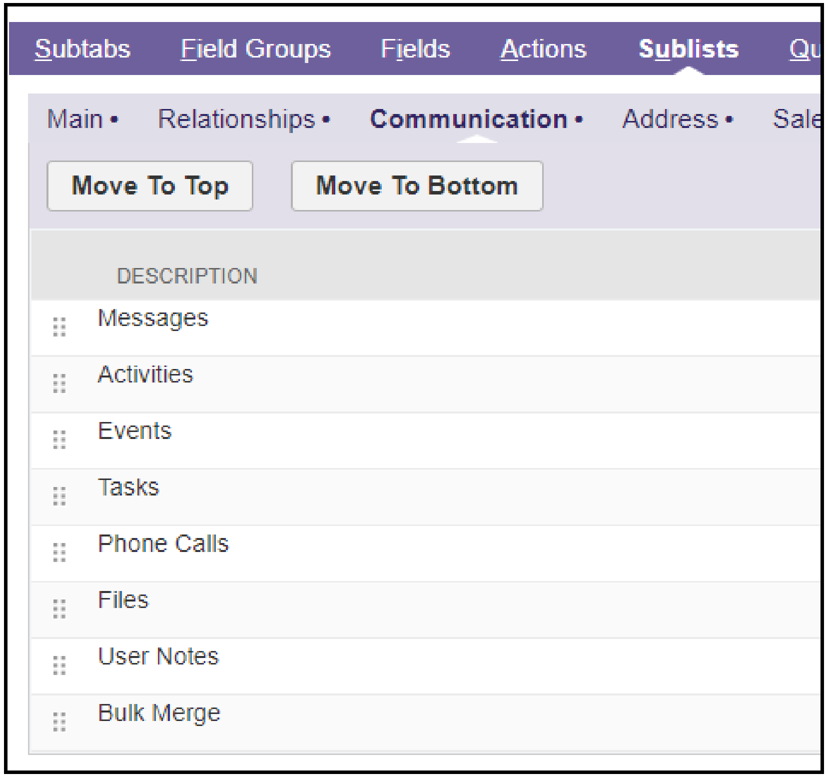
CUSTOM FORMS: SETTINGS





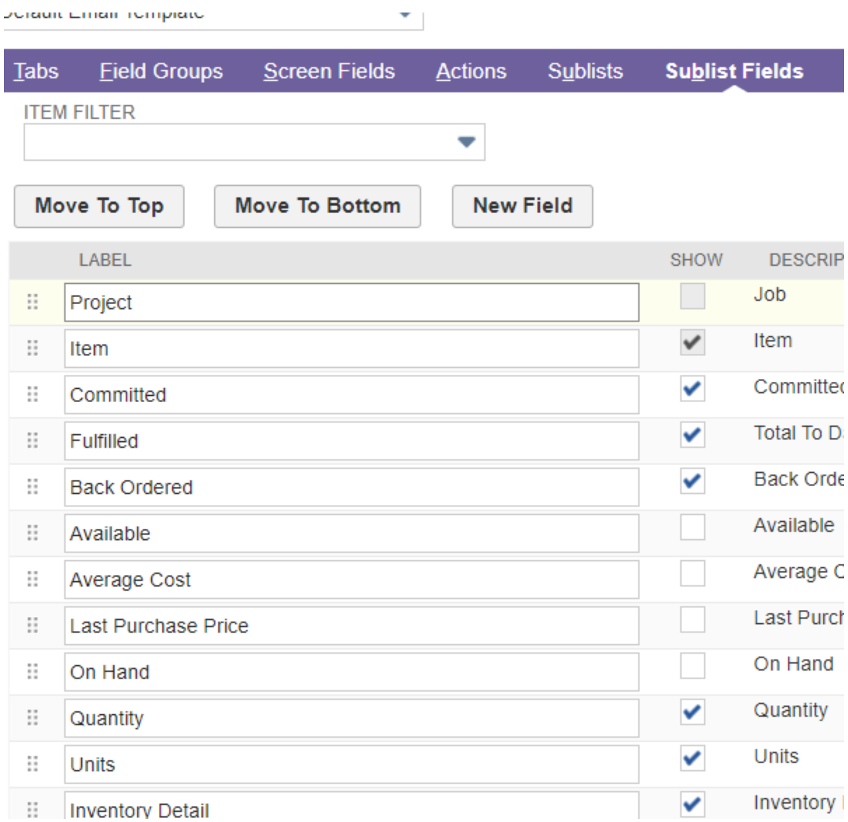
- Actions
  - Determines the actions that can be performed by users when viewing a record that uses this form
  - Can be set to shown as a Button or in the Actions drop-down menu

CUSTOM FORMS: SETTINGS



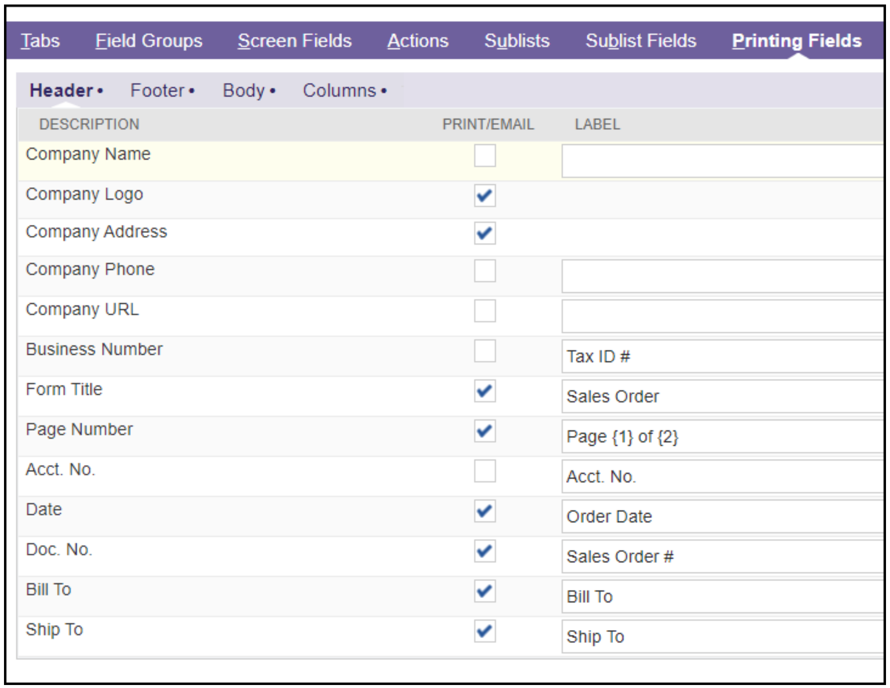
- Sublists
  - Determines which sublists are available on the form
  - Examples: Relationships, Communication, Addresses, Related Records etc . . .

CUSTOM FORMS: SETTINGS



- 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



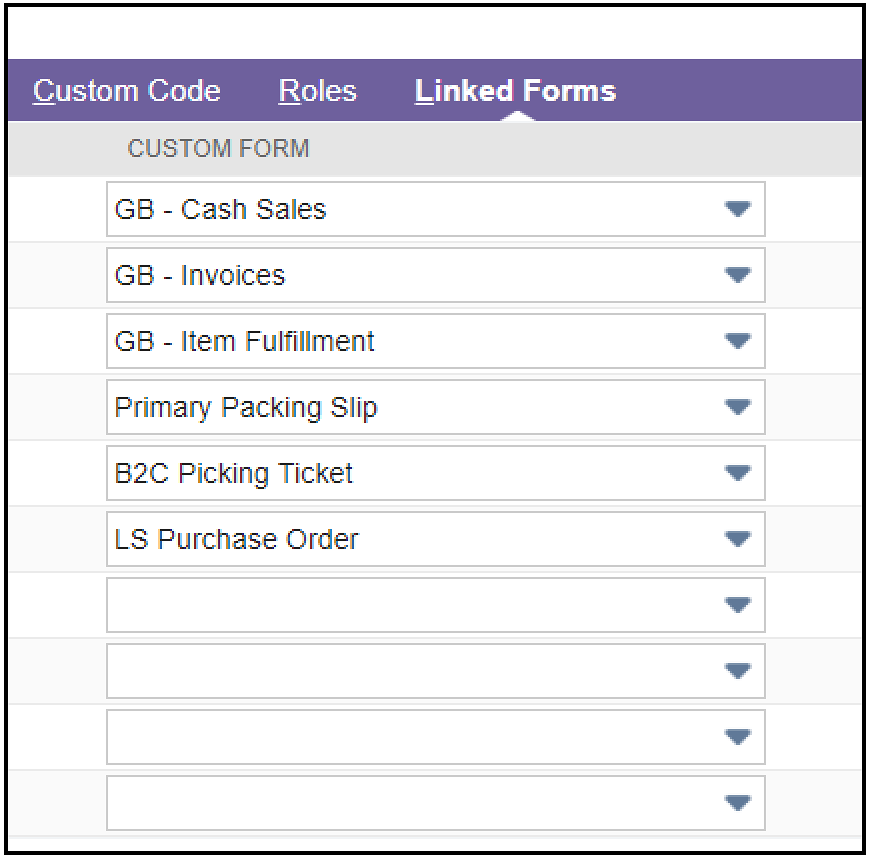
Tabs | Field Groups | Screen Fields | Actions | Sublists | Sublist Fields | Printing Fields

Header • Footer • Body • Columns •

DESCRIPTION	PRINT/EMAIL	LABEL
Company Name	☐	
Company Logo	☑	
Company Address	☑	
Company Phone	☐	
Company URL	☐	
Business Number	☐	Tax ID #
Form Title	☑	Sales Order
Page Number	☑	Page {1} of {2}
Acct. No.	☐	Acct. No.
Date	☑	Order Date
Doc. No.	☑	Sales Order #
Bill To	☑	Bill To
Ship To	☑	Ship To

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

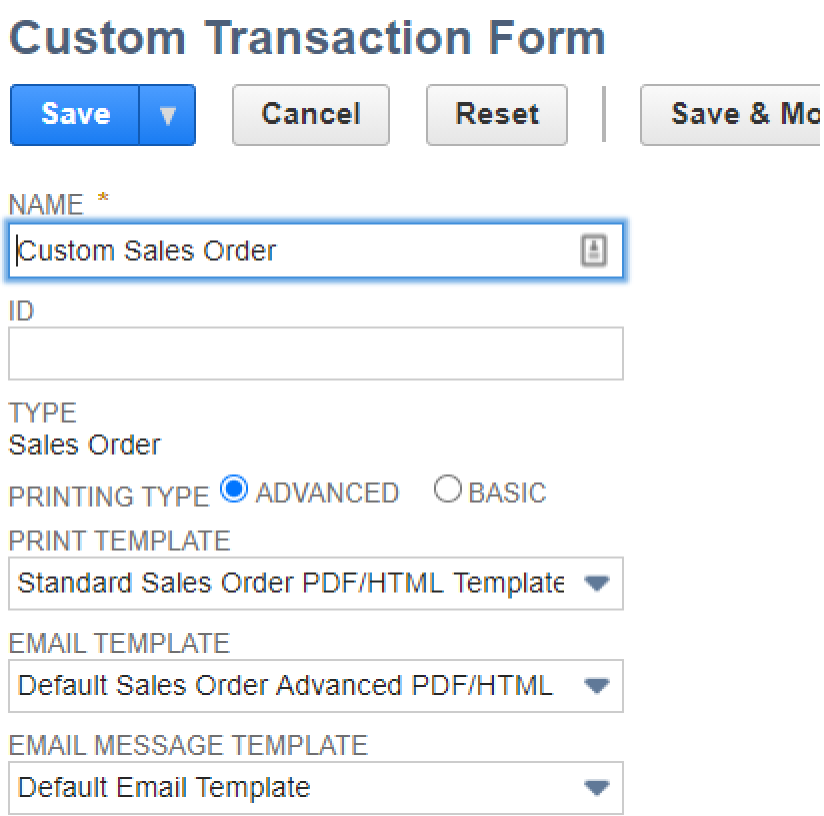
CUSTOM FORMS: SETTINGS



- 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

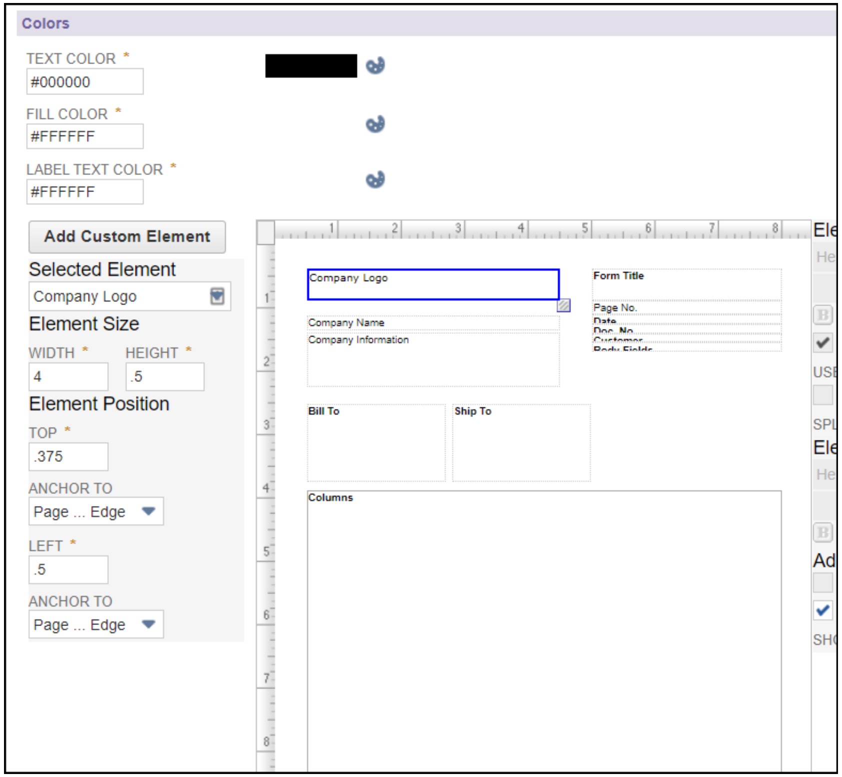
Demonstration Time

CUSTOM FORMS: PRINTING



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

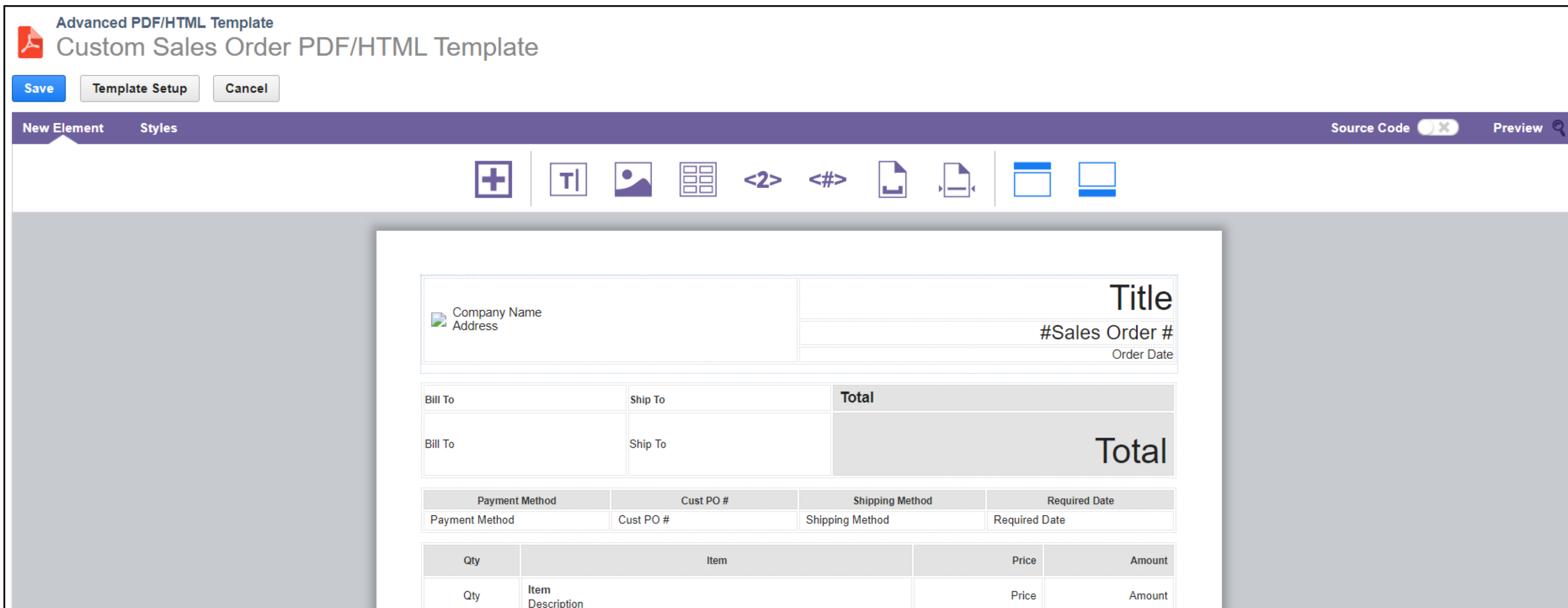
CUSTOM FORMS: BASIC PRINTING



- 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



Demonstration Time

CUSTOM RECORDS

CUSTOM RECORDS - SAID 10140

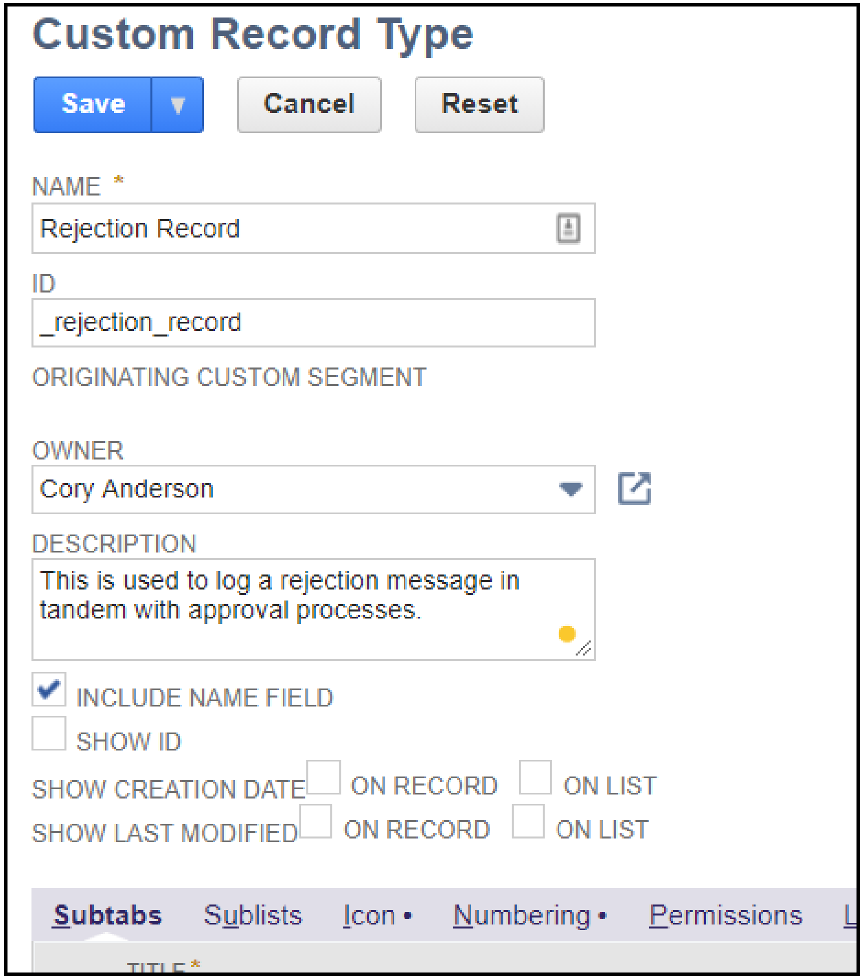
Custom Records allow you to collect and track information in your account. They are used to bridge any gaps that NetSuite might have to help you with your specific business needs.

Examples:

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

Other examples?

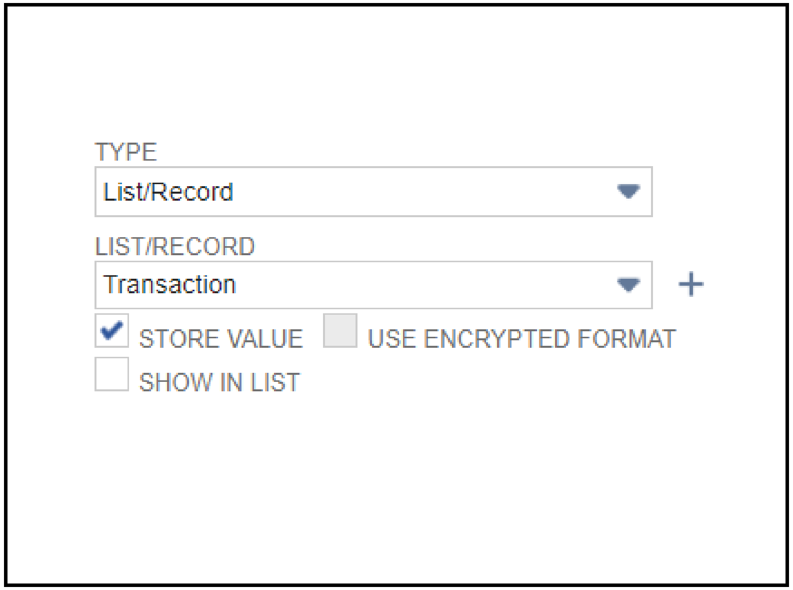
CUSTOM RECORDS: BEST PRACTICES

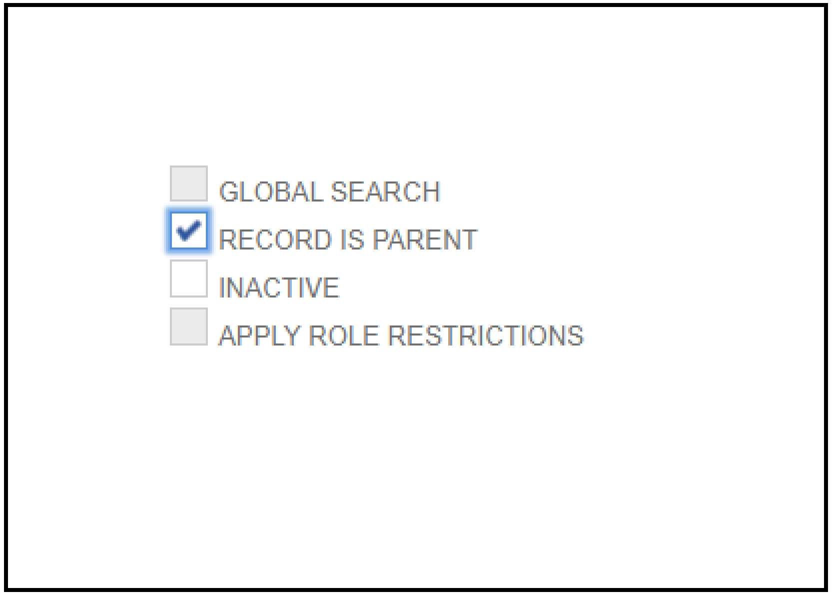


- Enter custom Internal ID
  - Example - _rejection_record
- Enter a Description
- Uncheck 'Include Name Field'
  - This field is required on new records when enabled
- Check 'Show ID'
  - This ensures that the unique system assigned ID number is visible and searchable
- Save, and then Edit to add fields

SAID 91075

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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