TIPS & TRICKS

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Custom Sublists

(attaching saved search results to transactions or entry forms)

What are Custom Sublists?

- Method to add a custom sublist to any transaction or entry form
- Uses saved search results to create the sublist
- Displays on transaction forms and entry forms - standard and custom records

Notes:

- Ability to create is determined by the **Custom Sublists** permission or as System Admin
- Still need permission to see underlying records or results will show nothing

Examples of Use

- List fulfillments on the Invoice record (doesn't normally show)
- List Invoices & Credit Memos on a customer record, highlighting past due (to isolate the important records and provide highlighting)
- List current BOM on an assembly record (eliminating clutter due to obsolete items showing)
- List Item receipts with ***additional*** fields on a item receipt sublist in a PO record (normal Receipts & Bills subtab can't be modified)
- List other customer with same sales rep on a Customer record
- List case records on an item record
- List Inventory Count records on an Inventory Adjustment record
- List information from a custom record on a transaction or entry form (provided they are linked)
- List project expenditures in detail on a project record

Steps to Create a Custom Sublist

1. **Create a saved search**
   - Make public
   - Must have filter that ties it to the record where you want to have it displayed
     - Examples: Created From: Internal ID (for transactions that are related to another transaction – PO, SO)
     - Example: Name (for transactions tied to a customer)
   - The **first** filter is the one that is used to tie it to the record and must be a list/record type field
   - If first filter is not list/record type then it won't show as available for sublist
   - Recommend that you test by showing filter and run search before next step

2. **Page:Sublists** to assign search, and where it should show

Custom Sublists customization > Forms > Sublists

Save Cancel

Transaction • Entity Item • CRM

SEARCH *	LABEL *	TRANSLATION	TAB	PURCHASE	SALE	OPPORTUNIT...	...ION	CUSTOM TRANSACTIONS	FIELD
**sublist item receipt for PO - MK	item receipts		Items	Yes					
**sublist item receipt & Bill for PO - MK	item receipts & bills		Items	Yes					
**Sublist - Related Fulfillments	Fulfillment link		Related Records Custom		Yes				Created From
**Sublist - Items in Fulfillments	Items Fulfilled		Related Records Custom		Yes				Created From

Caution: Shows on SO and invoice, so might want to create a subtab for it to appear on

Caution: Sometimes this auto populates and you must remove it

Example: Saved Search

sublist on Customer record of all Invoices and CM (highlight past due)

Saved Transaction Search

List Search Copy t

**sublist - customer invoices and CM

Criteria

FILTER*	DESCRIPTION*	FORMULA
Type	is any of Invoice, Credit Memo	
Main Line	is true	

Results

Columns ()

Remove all | Add Multiple

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TI
Date								
Due Date/Receive By								
Status								
Type								
Document Number								
Memo								
Amount								

Highlighting

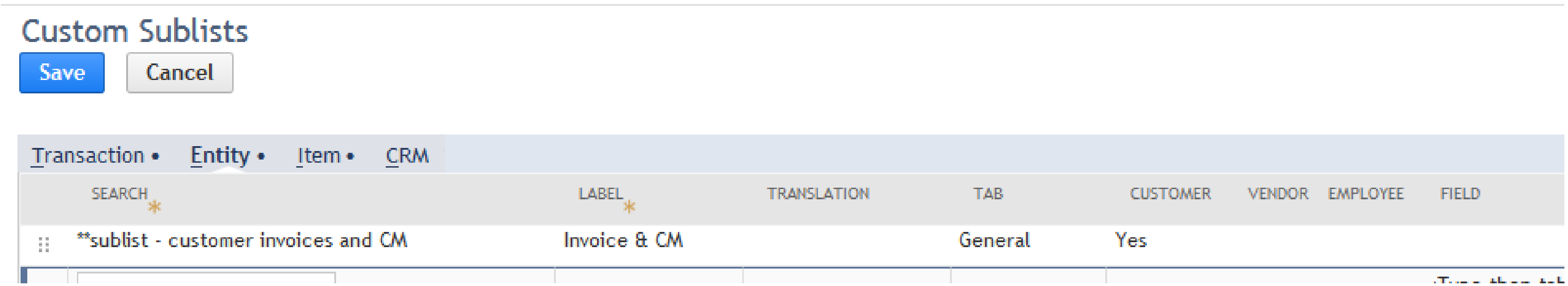
CONDITION*	IMAGE	TEXT COLOR	BACKGROUND COLOR	BOLD	DESCRIPTION	TRA
Due Date/Receive By is before today AND Status is Invoice:Open			☐	Yes	PAST DUE	

Available Filters

FILTER*	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT	LABEL	TRANSLATION
Name				

Example: Associated Sublist Entry

sublist on Customer record of all Invoices and CM (highlight past due)



Example: Results

sublist on Customer record of all Invoices and CM (highlight past due)

Customer

List View Dashboard Search

Edit Back Accept Payment Actions StickyNotes New:

Drop files here. Click for more options.

CUSTOMER ID

CUSTOMER IS INACTIVE

WHICH FORM

General Info Qualification Web Activity Address Financial Access Custom Target Marketing Relationship Marketing Warranty Workflow

Transactions • Contacts Activities User Notes System Notes • Messages Opportunities Items • Cases • Files Campaigns Subscriptions • Subcustomers Subscription Message History Jobs Upsell Invoice & CM •

EDIT	DATE	DUE DATE/RECEIVE BY ▼	STATUS	TYPE	DOCUMENT NUMBER	MEMO	AMOUNT
Edit	11/4/2020		Fully Applied	Credit Memo	1047-2020	Consulting and training	-15.00
Edit	11/4/2020		Fully Applied	Credit Memo	1048-2020	3 psx-gn for ENRZ	-10.00
Edit	12/17/2020	1/18/2021	Open	Invoice	04-1011-2020	Consulting & Training with PO 35	5,325.00
Edit	12/23/2020	1/18/2021	Open	Invoice	04-1012-2020	Consulting & Training with PO 35	5,325.00
Edit	12/17/2020	1/15/2021	Open	Invoice	04-1010-2020	5 ENZ-4000	2,475.00
Edit	10/1/2020	10/30/2020	Paid In Full	Invoice	04-1008-2020	3 psx-gn for ENRZ	2,250.00
Edit	10/1/2020	10/30/2020	Paid In Full	Invoice	04-1009-2020	Consulting and training	5,625.00
Edit	2/24/2020	2/24/2020	Paid In Full	Invoice	04-2870-2020	2 PSX-GN chargers, enrz-4000GN and ENRZ-1200	4,235.00
Edit	1/17/2020	1/20/2020	Paid In Full	Invoice	04-2851-2020	Enersize labels and Setup	8,090.00
Edit	10/24/2019	10/24/2019	Paid In Full	Invoice	04-1011-2019	1PSX-GN Ultrasonic Leak Detector	2,932.00
Edit	10/15/2019	10/15/2019	Paid In Full	Invoice	04-2816-2019	RMA081119 PSX-WR G5708 & RMA092619 PSX-GN 92-1505-0002	525.00
Edit	8/8/2019	8/8/2019	Paid In Full	Invoice	04-1007-2019	2 VPX-GN for Winkler in Sweden	5,658.00
Edit	6/3/2019	6/3/2019	Paid In Full	Invoice	04-1006-2019	1 ps-1100 kit Daniel Winkler	1,308.00

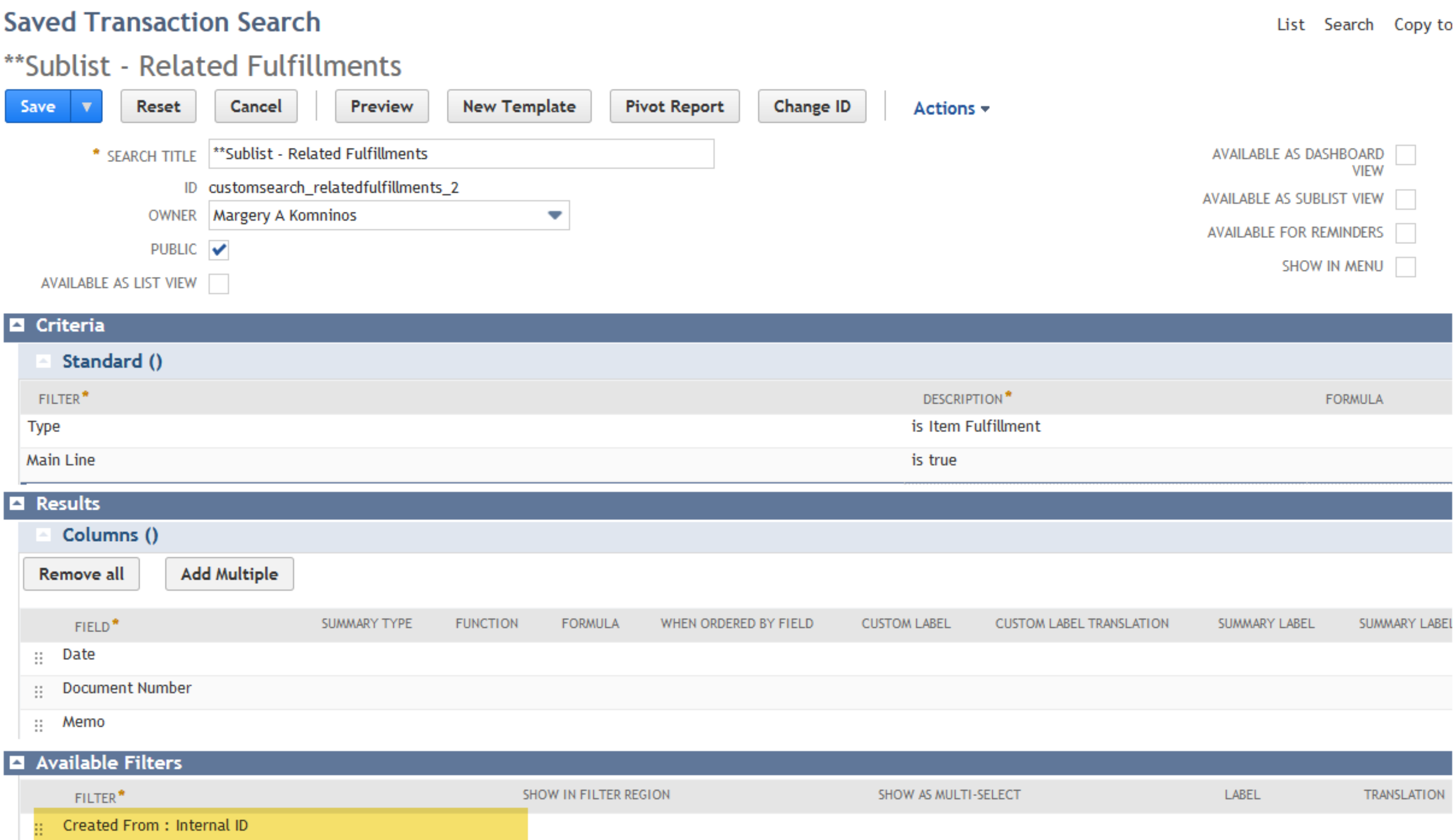
PAST DUE

Edit Back Accept Payment Actions

Example: Saved Search

sublist on Invoice to show item fulfillments

because you can’t see item fulfillments from Invoice (only from SO)



Example: Associated Sublist Entry

sublist on Invoice to show item fulfillments

Custom Sublists

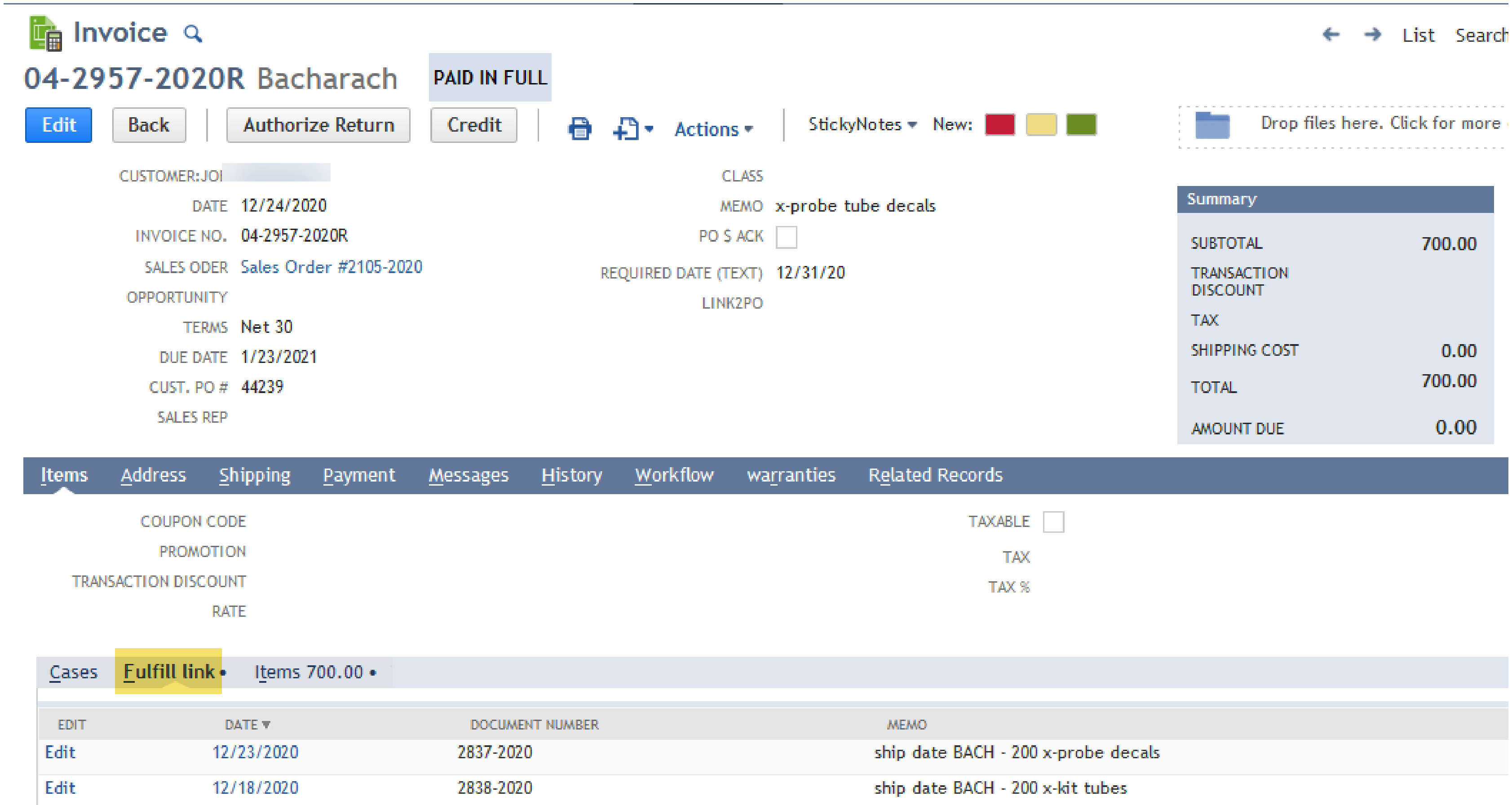
Save | Cancel

Transaction • Entity Item • CRM

SEARCH *	LABEL *	TRANSLATION	TAB	PURCHASE	SALE	OPPO	STOM NSACTIONS	FIELD
**sublist item receipt for PO - MK	item receipts		Items	Yes				
**sublist item receipt & Bill for PO - MK	item receipts & bills		Items	Yes				
**Sublist - Related Fulfillments	Fulfillment link		System Information		Yes			Created From
**Sublist - Items in Fulfillments	Items Fulfilled		Related Records Custom		Yes			Created From
**Sublist - Related Fulfillments	Fulfill link		Items		Yes			Created From
**sublist - prod release records -custom	Product Rel Records		Related Records Custom	Yes				

Example: Results

sublist on Invoice to show item fulfillments



Example: Saved Search

sublist on custom record (product release for BPOs) to show all releases on that PO

ORACLE NETSUITE PLANTSCAN

Search

Activities | Search/Reporty by Category | Transactions | Lists | Reports | Analytics | Documents | Setup | Customization | Shortages & Req

Saved Transaction Search

**sublist - product release PO

Criteria

FILTER*	DESCRIPTION*
Type	is Purchase Order
BLANKET PO (Custom Body)	is true
Name	is DPP
Main Line	is true

Results

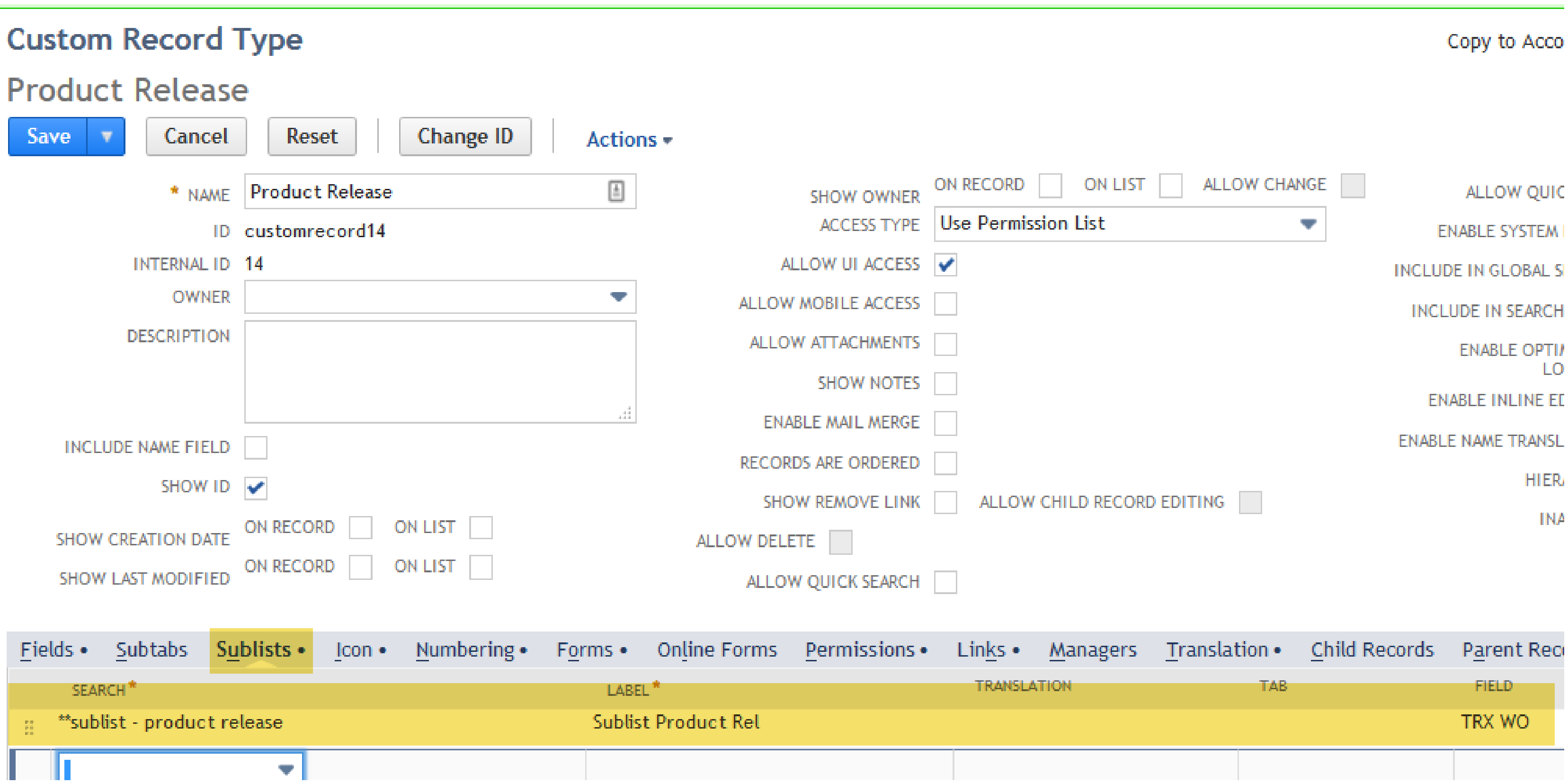
FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM
Product Release : Ship Date WO						
Date						
Document Number						
Name						
Product Release : Item ID						
Product Release : Item Name						
Product Release : Item WO						
Product Release : PO#						
Product Release : Product ID						
Product Release : Product Name						
Product Release : QTY WO						

Available Filters

FILTER*	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT
Product Release : TRX WO	Yes	

Example: Associated Sublist Entry

sublist on custom record to show associated POs



Example: Results

sublist on custom record to show associated POs

Product Release

Edit | Back | Actions ▾ | StickyNotes ▾ | New:

TRX ID	Purchase Order #05-2276-2019	SHIP DATE	2/8/2021	FOAM COUNT RETURNED	
VENDOR (ENTER FIRST)	DPP	MEMO/OR AEM DETAIL		LINE#	
ID	605	SHIP TO	Superior	PO QTY	2,200
ITEM FROM PO	Touch Probe-Resonator 82-0001-0500	SHIP VIA	ground	PO STATUS	Purchase Order:Partially Received
ITEM ID	82-0001-0500	SHIP TO ACCT	Superior		
ITEM NAME	Touch Probe-Resonator	SHIPPED	☐		
QTY RELEASE	112				

Custom | Workflow

* TRX WO

EDIT	SHIP DATE ▾	QTY	SHIPPED?	PRODUCT ID	ITEM NAME	SHIP TO
Edit	3/8/2021	112	No	82-0001-0500	Touch Probe-Resonator	Superior
Edit	2/8/2021	112	No	82-0001-0500	Touch Probe-Resonator	Superior
Edit	1/12/2021	10	Yes	82-0001-0500	Touch Probe-Resonator	Radiaulics
Edit	12/7/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	11/2/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	10/23/2020	84	Yes	82-0001-0500	Touch Probe-Resonator	Bacharach
Edit	10/5/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	8/3/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	7/6/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	6/4/2020	20	Yes	82-0001-0500	Touch Probe-Resonator	Radiaulics
Edit	6/1/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	3/17/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	3/17/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	2/3/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	1/15/2020	84	Yes	82-0001-0500	Touch Probe-Resonator	Bacharach
Edit	1/6/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	12/12/2019	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	11/22/2019	84	Yes	82-0001-0500	Touch Probe-Resonator	Bacharach
Edit	10/7/2019	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
Edit	8/12/2019	84	Yes	82-0001-0500	Touch Probe-Resonator	Bacharach
	Total	1934				

Q&A