



CUSTOMIZING NETSUITE

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CAC

Introduction to Customizations

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.

(Administrator role required)

There are lots 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.



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- CUSTOM RECORDS



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CUSTOM FIELDS

SAID 10092

A solid black horizontal bar spans the width of the slide, located at the bottom.



TYPES OF CUSTOM FIELDS

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.

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 items.



TYPES OF CUSTOM FIELDS

TRANSACTION BODY FIELDS

Used to add fields to the body/header 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.

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)



TYPES OF CUSTOM FIELDS

CRM FIELDS

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

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.



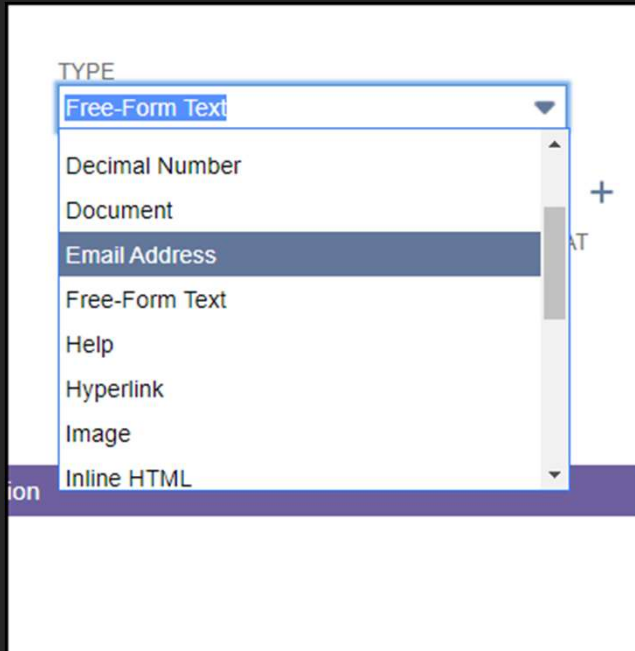
TYPES OF CUSTOM FIELDS

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.



SAID 10085 – Table of Custom
Field Type Descriptions

COMMONLY USED TYPES

- Checkbox
- Date
- Currency
- Integer Number
- Decimal Number
- List/Record
- Free-Form Text (**default**)
 - 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 Entity Field

Save ▼ Cancel Reset Apply to Forms

LABEL *

ID

OWNER
Cory Anderson ▼

DESCRIPTION

Applies To Display Validation & Defaulting Sourcing & Filtering A

☐ CUSTOMER ☐ CONTACT

☐ PROJECT ☐ PARTNER

☐ VENDOR ☐ GENERAL

☐ EMPLOYEE ☐ WEB SITE

☐ OTHER NAME ☐ GROUP

Save ▼ Cancel Reset Apply to Forms

Translation

HELP

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

Applies To | Display | Validation & Defaulting | Source

- ☐ PURCHASE
- ☐ SALE
- ☐ OPPORTUNITY
- ☐ JOURNAL
- ☐ EXPENSE REPORT
- ☐ WEB STORE
- ☐ TRANSFER ORDER
- ☐ ITEM RECEIPT ☐ VIEW FROM ORDER ONLY
- ☐ ITEM FULFILLMENT ☐ VIEW FROM ORDER ONLY

Save & Apply to Forms ▼ | Cancel | Reset

CUSTOM FIELDS: APPLIES TO



- Different options will show depending on the TYPE 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'

OWNER
Cory Anderson

Applies To **Display** Validation & Defaulting Source

INSERT BEFORE
- Unchanged -

SUBTAB
[Empty dropdown]

DISPLAY TYPE
Normal

DISPLAY WIDTH [Empty input]

Save & Apply to Forms [Dropdown arrow] Cancel Reset

SAID 10097

CUSTOM FIELDS: DISPLAY



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- 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



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- 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

A screenshot of a web-based configuration interface for custom fields. The interface has a dark purple header bar with four tabs: 'Applies To', 'Display' (which is selected and circled in red), 'Validation & Defaulting', and 'Sourcing'. Below the header, there are several configuration options: 'INSERT BEFORE' with a dropdown menu showing '- Unchanged -'; 'SUBTAB' with a dropdown menu; 'DISPLAY TYPE' with a dropdown menu showing 'Normal'; and 'DISPLAY SIZE' with two input fields labeled 'WIDTH' and 'HEIGHT'. At the bottom of the form, there are three buttons: 'Save & Apply to Forms' (blue), 'Cancel' (grey), and 'Reset' (grey).

SAID 10097

CUSTOM FIELDS: VALIDATION AND DEFAULTING

A screenshot of a web-based configuration interface for custom fields. The interface has a dark grey background. A white panel contains the configuration options. At the top of this panel is a tabbed interface with four tabs: 'Applies To', 'Display', 'Validation & Defaulting', and 'Source'. The 'Validation & Defaulting' tab is selected and highlighted with a red circle. Below the tabs, there are three checkboxes: 'MANDATORY', 'CHECK SPELLING', and 'MAXIMUM LENGTH'. The 'MANDATORY' checkbox is checked. Below these checkboxes is a text input field labeled 'MAXIMUM LENGTH'. At the bottom of the panel are three buttons: 'Save & Apply to Forms' (blue), 'Cancel' (grey), and 'Reset' (grey).

- 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

CUSTOM FIELDS: VALIDATION AND DEFAULTING



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- 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

A screenshot of the 'CUSTOM FIELDS: VALIDATION AND DEFAULTING' configuration page. The page has a purple header bar. Below it, there's a section titled 'DEFAULT VALUE' with a text input field, a small icon, and a checkbox labeled 'FORMULA'. Below this is a 'SEARCH' dropdown menu, and at the bottom is a 'FIELD' dropdown menu. The page is titled 'E ENCRYPTED FORMAT' at the top left.

www.RMNSUG.org/posts
Search for “Dynamic Field”

CUSTOM FIELDS: SOURCING AND FILTERING



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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.

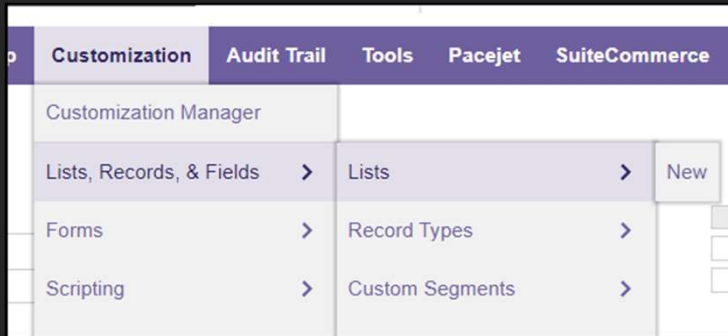
Can be used to control access to sensitive information, or fields that only apply to specific people in your company. Handy for testing new fields too.

A screenshot of the 'Access' configuration interface for custom fields. The interface has a purple header bar with tabs: 'Applies To', 'Display', 'Validation & Defaulting', 'Sourcing & Filtering', 'Access' (highlighted with a red circle), and 'Translation'. Below the header, there are two dropdown menus: 'DEFAULT ACCESS LEVEL' and 'DEFAULT LEVEL FOR SEARCH/REPORTING', both set to 'Edit'. A table below these allows for setting access levels for different roles. The table has columns for 'Role', 'Access Level', and 'Level for Search/Reporting'. The 'Role' column has a dropdown menu and a link icon. Below the table are buttons for 'Add', 'Cancel', 'Insert', and 'Remove'. At the bottom, there are buttons for 'Save & Apply to Forms', 'Cancel', 'Reset', and 'Apply to Forms'.



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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

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



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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



- 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 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

CUSTOM FORMS: SETTINGS



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- 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.

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



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

The image contains two screenshots from a software interface. The top screenshot shows the 'Custom Entry Form' settings page. At the top, there are buttons for 'Save', 'Cancel', 'Reset', and 'Save & Move Elements'. Below these is a 'Save & Edit' button. The form title is 'Gill Customer Form'. The ID field contains '_gill_customer'. The TYPE is 'Entity' and the SUBTYPE is 'Customer/Lead/Prospect'. There is an 'INACTIVE' checkbox. A red circle highlights the 'Field Groups' tab in the subtab navigation bar. Below the tabs, there is a 'Main' subtab and a list of field groups, with 'Primary Information' being the first one. The bottom screenshot shows a customer record for 'Tom Dale'. The record has tabs for 'Primary Information' and 'Email | Phone | Address'. The 'Primary Information' tab is active, showing fields for 'CUSTOMER ID', 'NAME', 'JOB TITLE', and 'COMPANY NAME'. The 'Email | Phone | Address' tab is also visible.

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



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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.

The screenshot shows the 'Fields' tab of the CAC Custom Forms Settings page. The 'Fields' tab is highlighted with a red circle. Below the tab are buttons for 'Move To Top', 'Move To Bottom', and 'New Field'. A table lists various fields with columns for 'DESCRIPTION', 'SHOW', 'QUICK ADD', 'MANDATORY', and 'DISPLAY'. The 'SHOW' column contains checkboxes, 'QUICK ADD' contains checkboxes, 'MANDATORY' contains checkboxes, and 'DISPLAY' contains text boxes. The 'DESCRIPTION' column lists fields such as 'Custom Form', 'Name/ID', 'Auto Name', 'Name (when Numbered)', 'Type', 'Mr./Ms...', 'Name', 'Furigana', 'Job Title', 'Company Name', 'Parent', 'Status', 'Probability', 'Sales Rep', 'Partner', 'Web Address', and 'Category'. The 'SHOW' column has checkboxes for all fields, with 'Custom Form' checked. The 'QUICK ADD' column has checkboxes for 'Name/ID', 'Auto Name', 'Name (when Numbered)', 'Type', 'Mr./Ms...', 'Name', 'Furigana', 'Job Title', 'Company Name', 'Parent', 'Status', 'Probability', 'Sales Rep', 'Partner', 'Web Address', and 'Category', with 'Name/ID', 'Auto Name', 'Name (when Numbered)', 'Type', 'Mr./Ms...', 'Name', 'Furigana', 'Job Title', 'Company Name', 'Parent', 'Status', 'Probability', 'Sales Rep', 'Partner', 'Web Address', and 'Category' checked. The 'MANDATORY' column has checkboxes for 'Custom Form', 'Name/ID', 'Auto Name', 'Name (when Numbered)', 'Type', 'Mr./Ms...', 'Name', 'Furigana', 'Job Title', 'Company Name', 'Parent', 'Status', 'Probability', 'Sales Rep', 'Partner', 'Web Address', and 'Category', with 'Custom Form', 'Name/ID', 'Auto Name', 'Name (when Numbered)', 'Type', 'Mr./Ms...', 'Name', 'Furigana', 'Job Title', 'Company Name', 'Parent', 'Status', 'Probability', 'Sales Rep', 'Partner', 'Web Address', and 'Category' checked. The 'DISPLAY' column has text boxes for all fields, with 'Custom Form' set to 'Normal', 'Name/ID' set to 'Normal', 'Auto Name' set to 'Normal', 'Name (when Numbered)' set to 'Inline Text', 'Type' set to 'Normal', 'Mr./Ms...' set to 'Normal', 'Name' set to 'Normal', 'Furigana' set to 'Normal', 'Job Title' set to 'Normal', 'Company Name' set to 'Normal', 'Parent' set to 'Normal', 'Status' set to 'Normal', 'Probability' set to 'Normal', 'Sales Rep' set to 'Normal', 'Partner' set to 'Normal', 'Web Address' set to 'Normal', and 'Category' set to 'Normal'.

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

	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



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- 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



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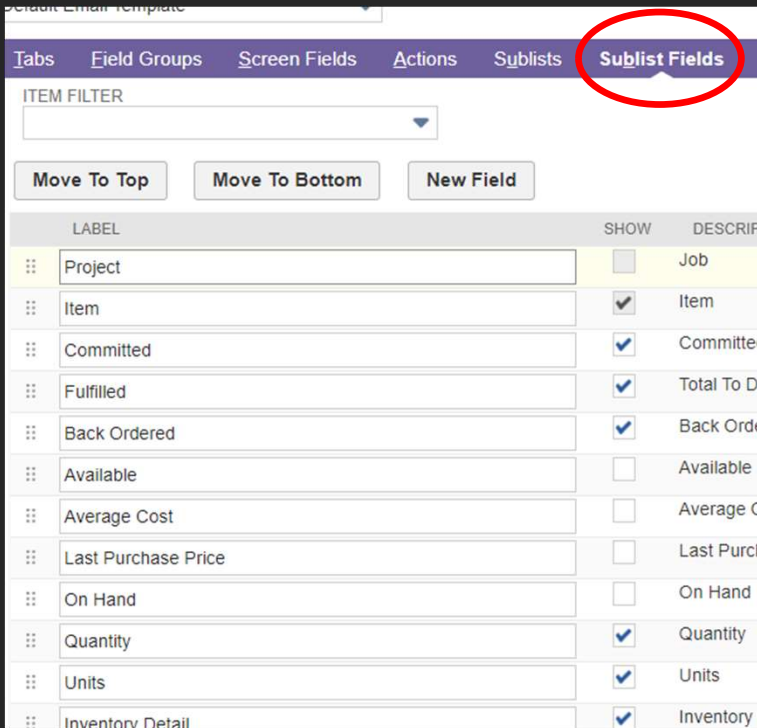
- Sublists
 - Determines which sublists are available on the form
 - Examples: Relationships, Communication, Addresses, Related Records etc . . .

A screenshot of the 'CUSTOM FORMS: SETTINGS' interface. The top navigation bar includes tabs for 'Subtabs', 'Field Groups', 'Fields', 'Actions', 'Sublists' (which is highlighted with a red circle), and 'Qu'. Below the navigation bar, there are two buttons: 'Move To Top' and 'Move To Bottom'. A table with a header 'DESCRIPTION' lists various sublists: Messages, Activities, Events, Tasks, Phone Calls, Files, User Notes, and Bulk Merge. Each row in the table has a small icon of three dots to its left.

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

The screenshot shows the 'Sublist Fields' settings tab, which is highlighted with a red circle. The interface includes a top navigation bar with tabs for 'Tabs', 'Field Groups', 'Screen Fields', 'Actions', 'Sublists', and 'Sublist Fields'. Below the navigation bar, there is an 'ITEM FILTER' dropdown menu and three buttons: 'Move To Top', 'Move To Bottom', and 'New Field'. A table lists various fields with their labels, a 'SHOW' checkbox, and a description. The fields are: Project, Item, Committed, Fulfilled, Back Ordered, Available, Average Cost, Last Purchase Price, On Hand, Quantity, Units, and Inventory Detail. The 'SHOW' column has checkboxes for each field, with 'Item', 'Committed', 'Fulfilled', 'Back Ordered', 'Quantity', 'Units', and 'Inventory Detail' currently checked.

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

CUSTOM FORMS: PRINTING FIELDS



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



- 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

Custom Code	Roles	Linked Forms
CUSTOM FORM		
GB - Cash Sales		▼
GB - Invoices		▼
GB - Item Fulfillment		▼
Primary Packing Slip		▼
B2C Picking Ticket		▼
LS Purchase Order		▼
		▼
		▼
		▼
		▼


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 Transaction Form

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

NAME *
Custom Sales Order 

ID

TYPE
Sales Order

PRINTING TYPE ☒ ADVANCED ☐ BASIC

PRINT TEMPLATE
Standard Sales Order PDF/HTML Template ▼

EMAIL TEMPLATE
Default Sales Order Advanced PDF/HTML ▼

EMAIL MESSAGE TEMPLATE
Default Email Template ▼



CUSTOM FORMS: PRINTING

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

The screenshot shows the CAC Custom Forms WYSIWYG editor. On the left is a sidebar with settings for the selected element. The 'Colors' section includes 'TEXT COLOR' (set to #000000), 'FILL COLOR' (set to #FFFFFF), and 'LABEL TEXT COLOR' (set to #FFFFFF). Below this is an 'Add Custom Element' button. The 'Selected Element' section shows 'Company Logo'. The 'Element Size' section has 'WIDTH' set to 4 and 'HEIGHT' set to .5. The 'Element Position' section has 'TOP' set to .375, 'ANCHOR TO' set to 'Page ... Edge', 'LEFT' set to .5, and 'ANCHOR TO' set to 'Page ... Edge'. The main canvas shows a form layout with a 'Company Logo' placeholder, a 'Form Title' field, a 'Company Name' field, a 'Company Information' field, a 'Bill To' field, a 'Ship To' field, and a 'Columns' section. A ruler is visible at the top of the canvas.

CUSTOM FORMS: ADVANCED PDF/HTML



- 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

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

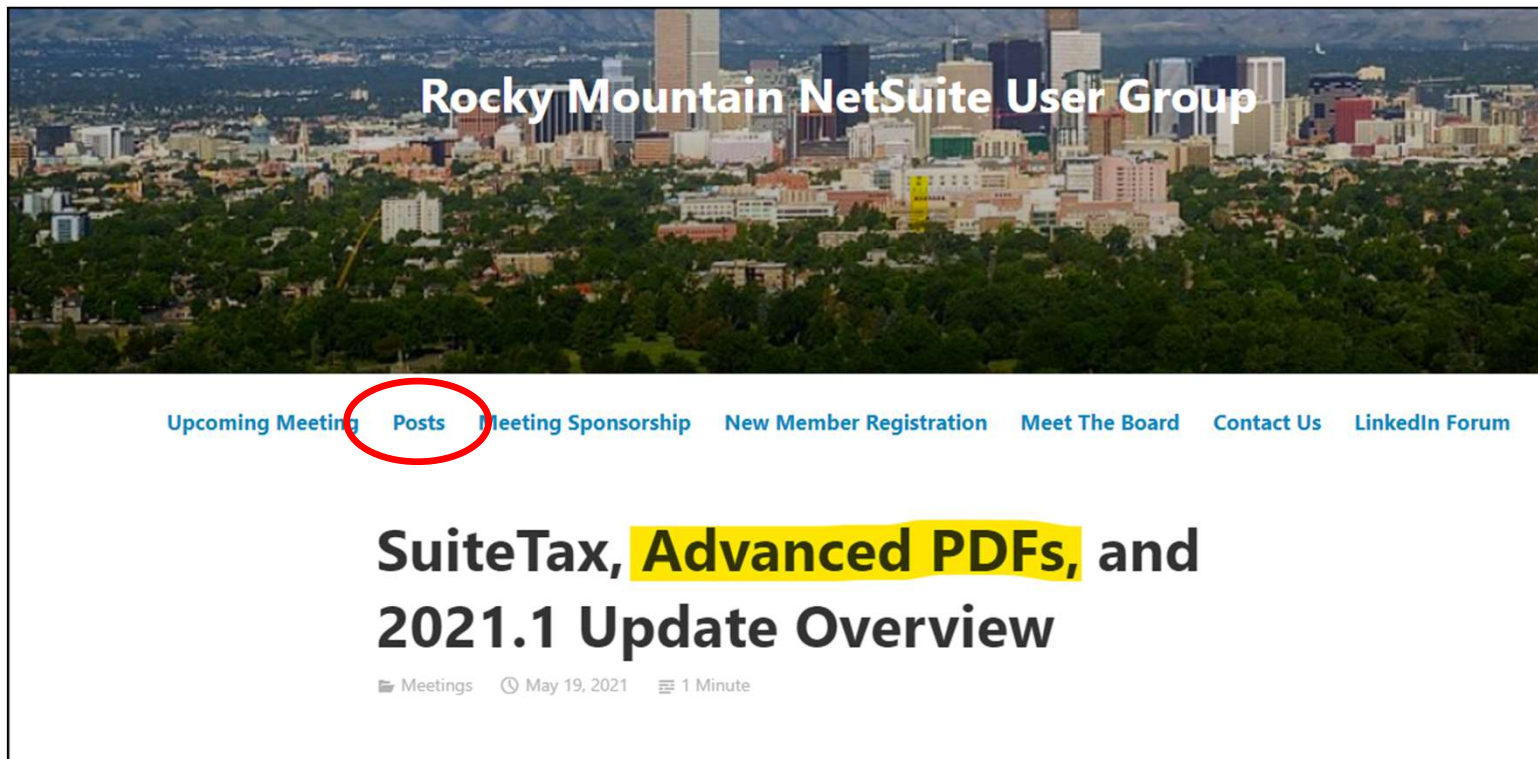
Qty	Item	Price	Amount
Qty	Item Description	Price	Amount

CUSTOM FORMS: ADVANCED PDF/HTML

- <https://rmnsug.org/2021/05/19/suitetax-advanced-pdfs-and-2021-1-update-overview/>



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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

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

TITLE *



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'

TYPE
List/Record ▼

LIST/RECORD
Transaction ▼ +

☒ STORE VALUE ☐ USE ENCRYPTED FORMAT

☐ SHOW IN LIST

☐ GLOBAL SEARCH

☒ RECORD IS PARENT

☐ INACTIVE

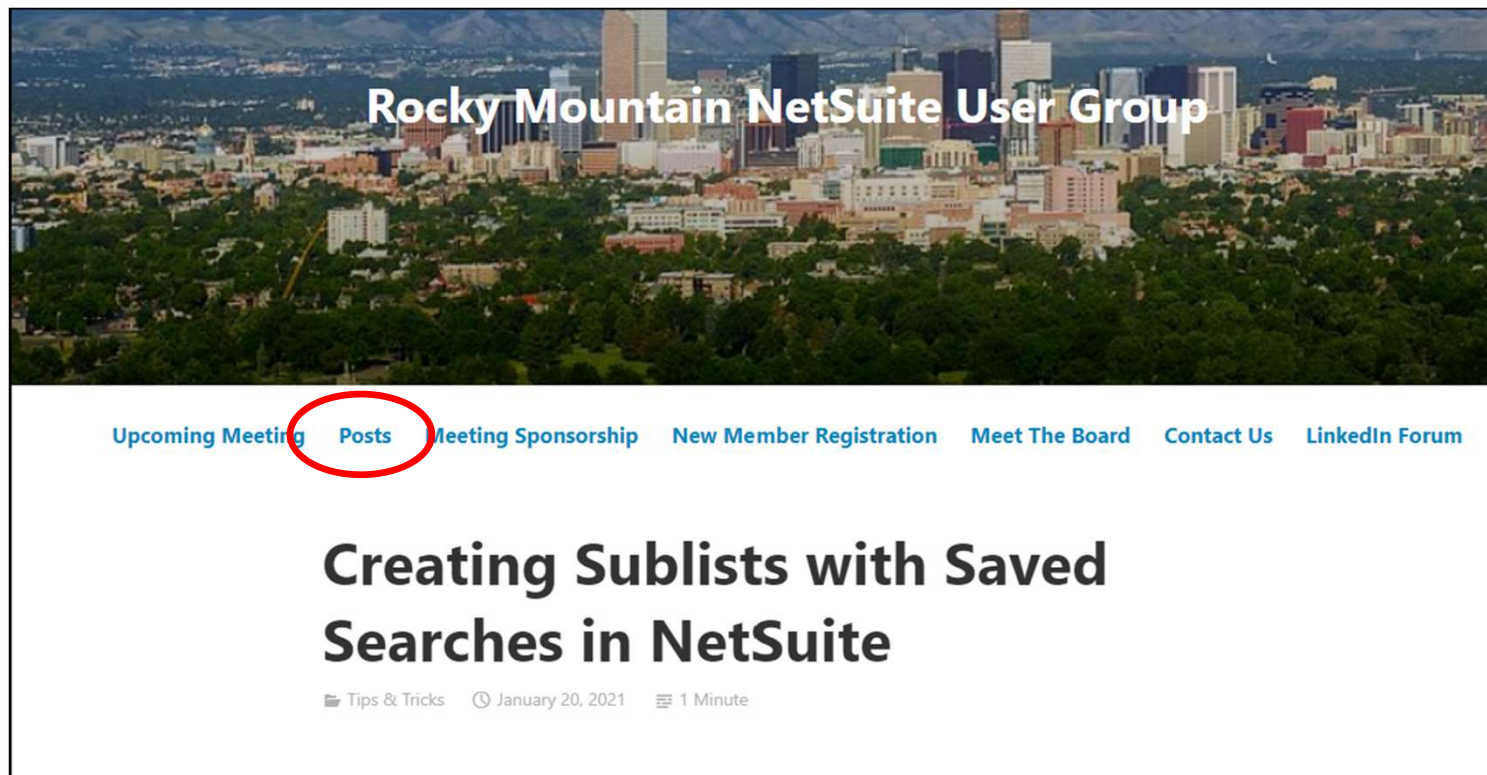
☐ APPLY ROLE RESTRICTIONS

NOTEWORTHY: SUBLISTS

- <https://rmnsug.org/2021/01/20/creating-sublists-with-saved-searches-in-netsuite/>



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*Logic will get you from A to B.
Imagination will take you
everywhere.”*

- ALBERT EINSTEIN



Thank you!

CORY@CORYANDERSONCONSULTING.COM

A solid dark gray horizontal bar spans the width of the slide, positioned below the contact information.