

WORKFLOW OVERVIEW: EXTENDING NETSUITE WITH SUITEFLOW

Rocky Mountain NetSuite User Group

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Agenda

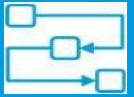
Overview of SuiteFlow

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

TYPE
Add Button
Confirm
Create Line
Create Record
Go To Page
Go To Record
Initiate Workflow
Lock Record
Remove Button
Return User Error
Send Campaign Email
Send Email
Set Field Display Label
Set Field Display Type
Set Field Mandatory
Set Field Value
Show Message

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

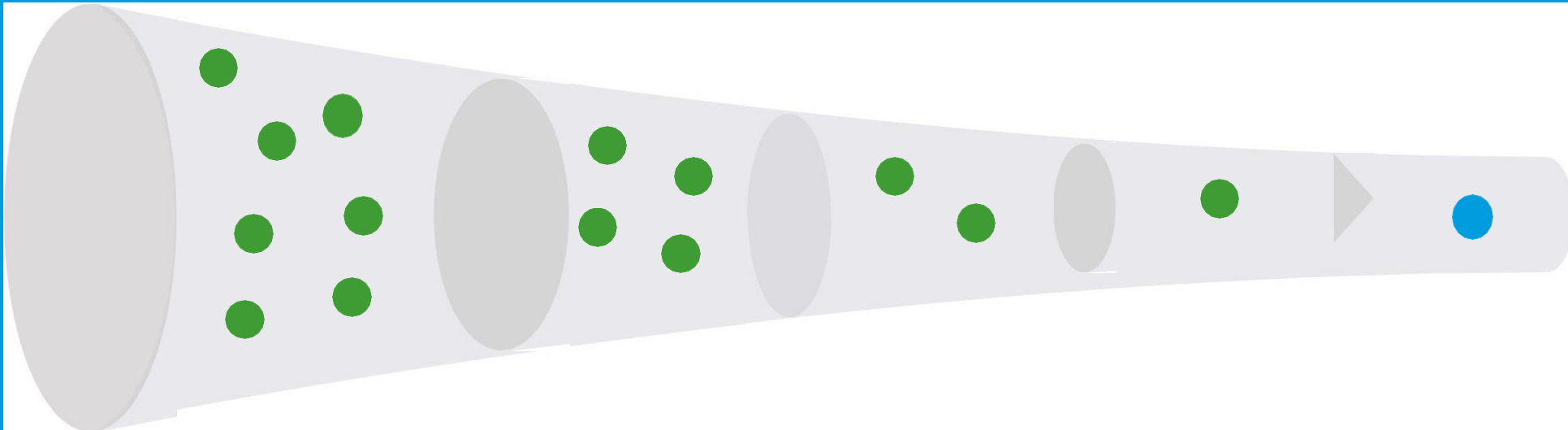
☐ PRINT ON STATEMENT

☐ 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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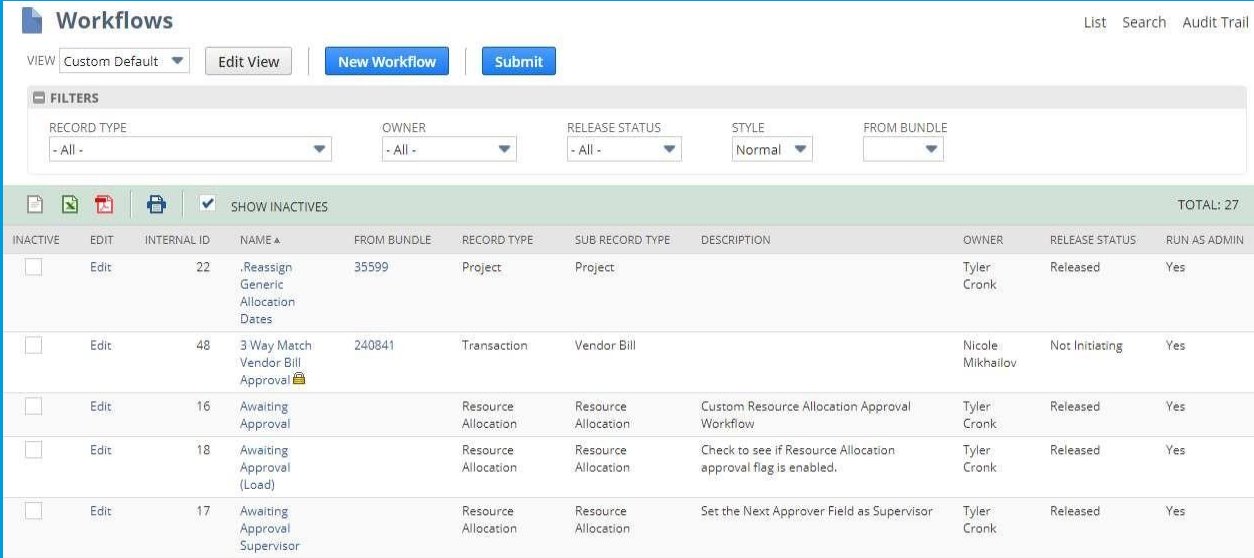
Question and Answer



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: - All -

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

NAME *

Purchase Order Basic Approval

ID

customworkflow_36

RECORD TYPE *

Transaction

SUB TYPES *

Advanced Intercompany Journal Entry

Cash Refund

Cash Sale

Check

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

Suspended: No **new** instances of workflow are initiated, no **existing** workflow instances continue running

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'

Testing: Only runs for employee listed in the owner field

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 is its own Record Type

Workflow Instance Search

Return To Criteria Edit this Search

FILTERS

WORKFLOW: Invoice Collection Workflow TYPE: - All - STYLE: Normal

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 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 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



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 (rare)

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

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 [TSTDV1221897] 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

1 2 3

1. Manage with master workflow
2. Have workflow kick off following workflow
3. Do not have dependent workflows initiation user events

Run server SuiteScript and trigger workflows on Import

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 >

Polling Question #1

Which of the following is not a valid Release status:

- A. Suspended
- B. Not Initiating
- C. Testing
- D. Released
- E. Inactive

Polling Question #2

Execute as Admin is primarily used to:

- A. Improve processing time
- B. Make system notes easier to understand for Auditors
- C. Bypass permission issues
- D. Make it so only Admins can run the workflow

Agenda

Overview of SuiteFlow

Managing Existing Workflows

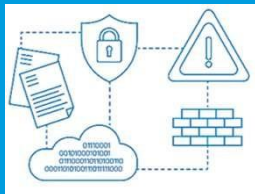
Workflow Demonstrations

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

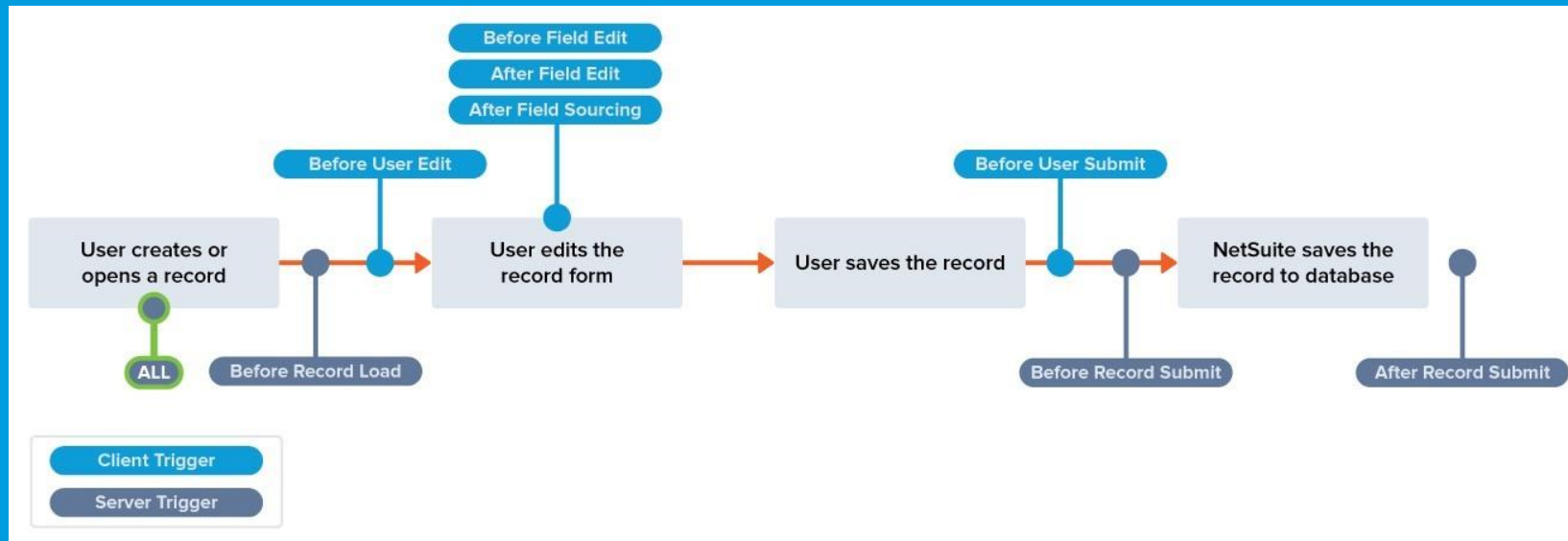
Method of Sketch



Visio, LucidChart, Word, Excel

Action triggers drive the timing of workflow actions

Workflow trigger types and timing



Workflow Triggers - Server

Server triggers occur when a record is read from or written to the NetSuite database or when a record enters or exits a state in a workflow. Server triggers are classified as either record based, workflow based, or time based.

Trigger Name	Applies To	Description
Before Record Load	Workflow initiation	Triggers when a new record is created, before it is loaded into the browser, or before an existing record loads into the browser.
Before Record Submit	Workflow initiation	Occurs after a user clicks Save on a record and before NetSuite saves the record data to the database.
After Record Submit	Workflow initiation	Occurs after NetSuite saves the record data to the database.
Scheduled	Workflow initiation	You can create a schedule for workflows to initiate, and for actions and transitions to execute.
Entry	Actions	Occurs the first time that a workflow enters a state at the same time as the first server trigger*.
Exit	Actions	Occurs when a workflow exits a state and transitions to another state.
ALL	Workflow initiation	For workflow initiation only. The workflow initiates on any triggering event.

Workflow Triggers - Client

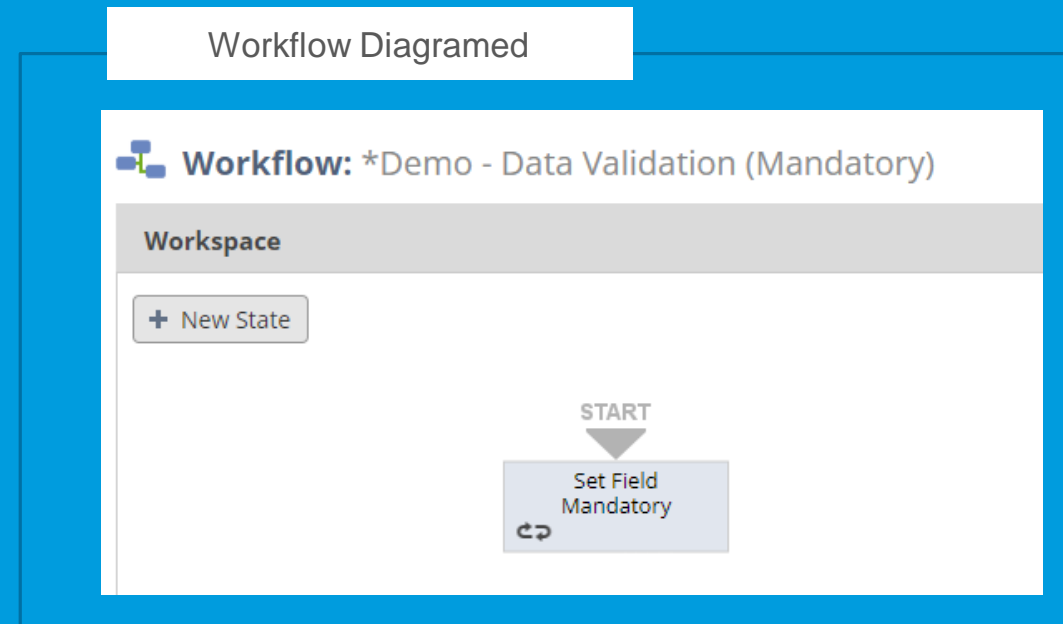
Client triggers execute when a user interacts with a record form in NetSuite. You can view the client triggers used for actions for a specific workflow state under Form Event on the State subtab of the context panel.

Trigger Name	Description
Before User Edit	Executes when the record form loads into the browser.
Before Field Edit	Executes when user tabs or clicks away from a field after entering a value.
After Field Edit	Executes when a user enters or changes the value of a field.
After Field Sourcing	Executes after a field change, after all of the child field values for the field are sourced.
Before User Submit	Executes every time a user clicks Save when the form is in the state. The actions execute in the browser, before any data is sent to the NetSuite database and the save operation occurs.

Workflow Demo: Data Entry Validation

- Set Field Display Type & Mandatory After Field Edit

- Single State
- Client Trigger
 - Action = Set Field Mandatory
 - Action = Set Field Display Type
- Condition based on field value
- Workflow History



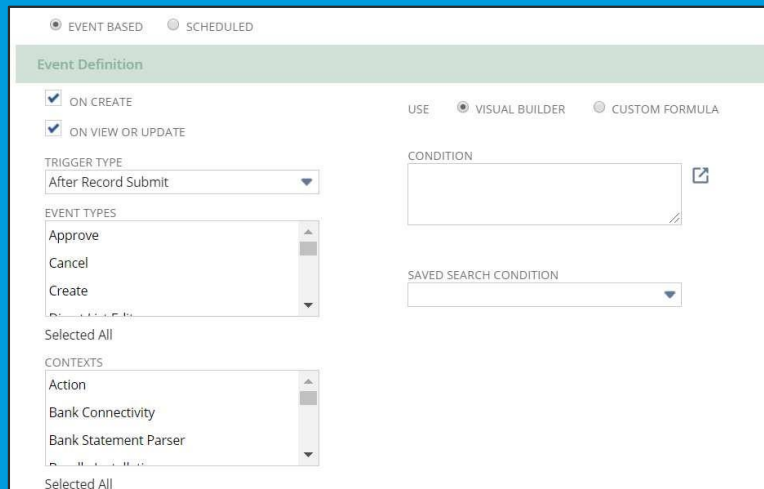
NETSUITE DEMO

Data Entry Validation

Initiation specifies the input to kickoff a workflow

Event based

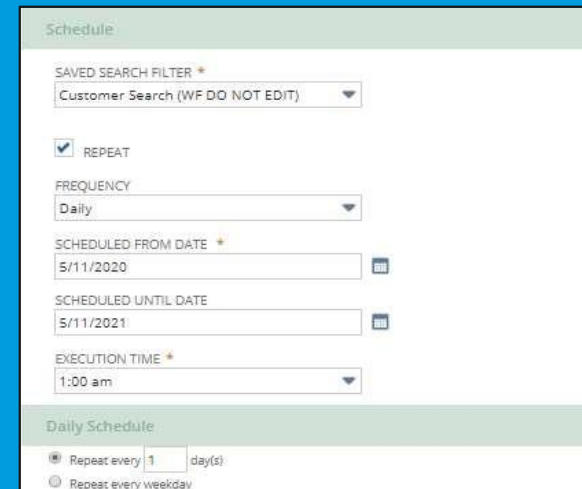
- Select Trigger Type
- Event Type
- Context



The screenshot shows the 'Event Definition' configuration window. At the top, there are two tabs: 'EVENT BASED' (selected) and 'SCHEDULED'. Below the tabs, there are two checkboxes: 'ON CREATE' and 'ON VIEW OR UPDATE', both of which are checked. To the right of these checkboxes, there 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 the trigger type, there is a 'CONDITION' text box with a small icon to its right. Below the trigger type, there is an 'EVENT TYPES' list with 'Approve', 'Cancel', 'Create', and 'Delete' visible. Below the event types, there is a 'SAVED SEARCH CONDITION' dropdown menu. At the bottom, there is a 'CONTEXTS' list with 'Action', 'Bank Connectivity', and 'Bank Statement Parser' visible.

Scheduled

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



The screenshot shows the 'Schedule' configuration window. At the top, there is a 'SAVED SEARCH FILTER' dropdown menu with 'Customer Search (WF DO NOT EDIT)' selected. Below this, there is a 'REPEAT' checkbox which is checked. Below the repeat checkbox, there is a 'FREQUENCY' dropdown menu with 'Daily' selected. Below the frequency, there is a 'SCHEDULED FROM DATE' text box with '5/11/2020' entered. Below the start date, there is a 'SCHEDULED UNTIL DATE' text box with '5/11/2021' entered. Below the end date, there is an 'EXECUTION TIME' dropdown menu with '1:00 am' selected. At the bottom, there is a 'Daily Schedule' section with two radio buttons: 'Repeat every 1 day(s)' (selected) and 'Repeat every weekday'.

Workflow Demo: Scheduled Workflow to Auto-Send Invoice

- Scheduled Workflow – Email Invoices
 - Define Saved Search
 - Type = Invoice
 - Criteria
 - Invoice Sent = F
 - Do Not Auto-Send = F
 - Email = Not Empty
 - Use testing to execute right away
 - Testing only runs on 1st 20 results
 - Search Record Type must be same type as Workflow (i.e. Customer Workflow is used with Customer Search)

NETSUITE DEMO

Scheduled Workflow

Polling Question #3

When is the 'Execute Now' button able to be used?

- A. When user has the admin role
- B. Whenever it is pressed
- C. If Workflow is Released
- D. If Workflow is in Testing

Polling Question # 4

When do you use Scheduled Workflows?

A. To manage Approvals

B. Perform updates on a defined population without user interaction

C. Users in different time zones

D. Personal Preference

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

Workflow Condition

Save Reset Cancel Actions

☒ USE EXPRESSIONS

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>					

Add Cancel Insert Remove

Save Reset Cancel Actions

3 Search

Condition

USE ☒ VISUAL BUILDER ☐ CUSTOM FORMULA

CONDITION

SAVED SEARCH
Customer Credit Limit > 10K

Schedule

USE ☒ DELAY ☐ TIME OF DAY

DELAY

START TIME

RECURRANCE

UNIT

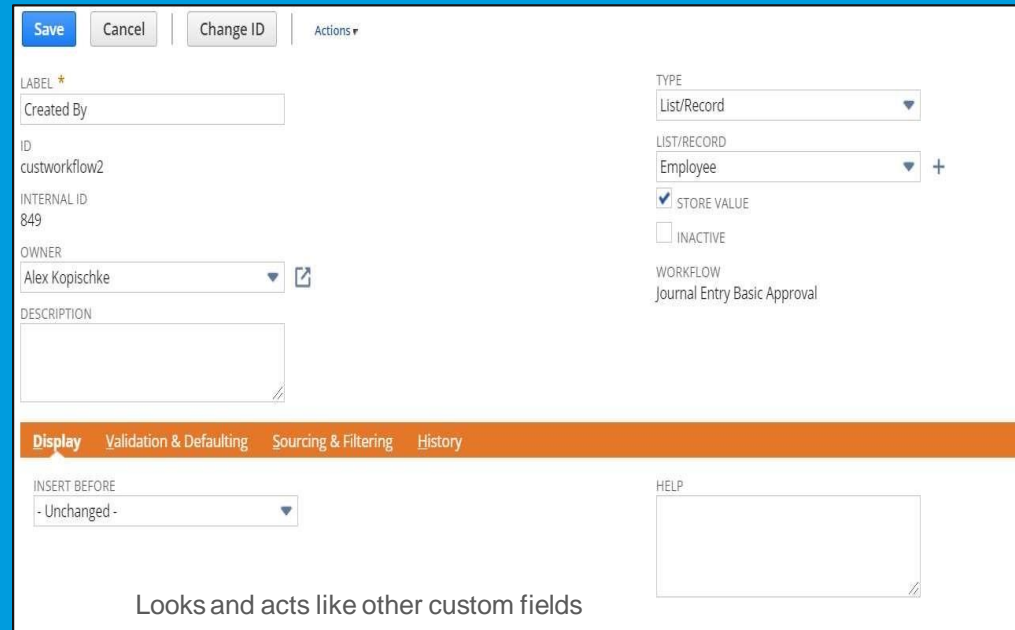
Workflow and state fields allow for saving and using values within a workflow

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



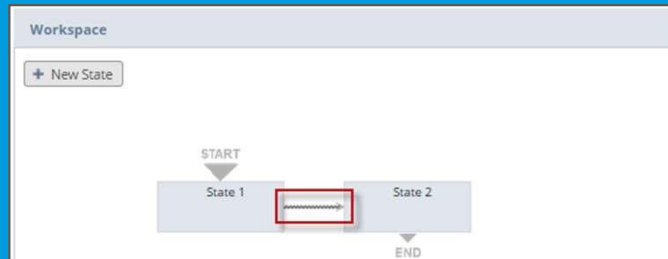
The screenshot shows the configuration interface for a Workflow Field. At the top, there are buttons for 'Save', 'Cancel', 'Change ID', and an 'Actions' dropdown. The main form contains the following fields:

- LABEL ***: A text input field containing 'Created By'.
- ID**: A text input field containing 'custworkflow2'.
- INTERNAL ID**: A text input field containing '849'.
- OWNER**: A dropdown menu showing 'Alex Kopischke' with an external link icon.
- DESCRIPTION**: A large text area for additional details.
- TYPE**: A dropdown menu showing 'List/Record'.
- LIST/RECORD**: A dropdown menu showing 'Employee' with a plus icon.
- STORE VALUE**: A checked checkbox.
- INACTIVE**: An unchecked checkbox.
- WORKFLOW**: A text input field containing 'Journal Entry Basic Approval'.

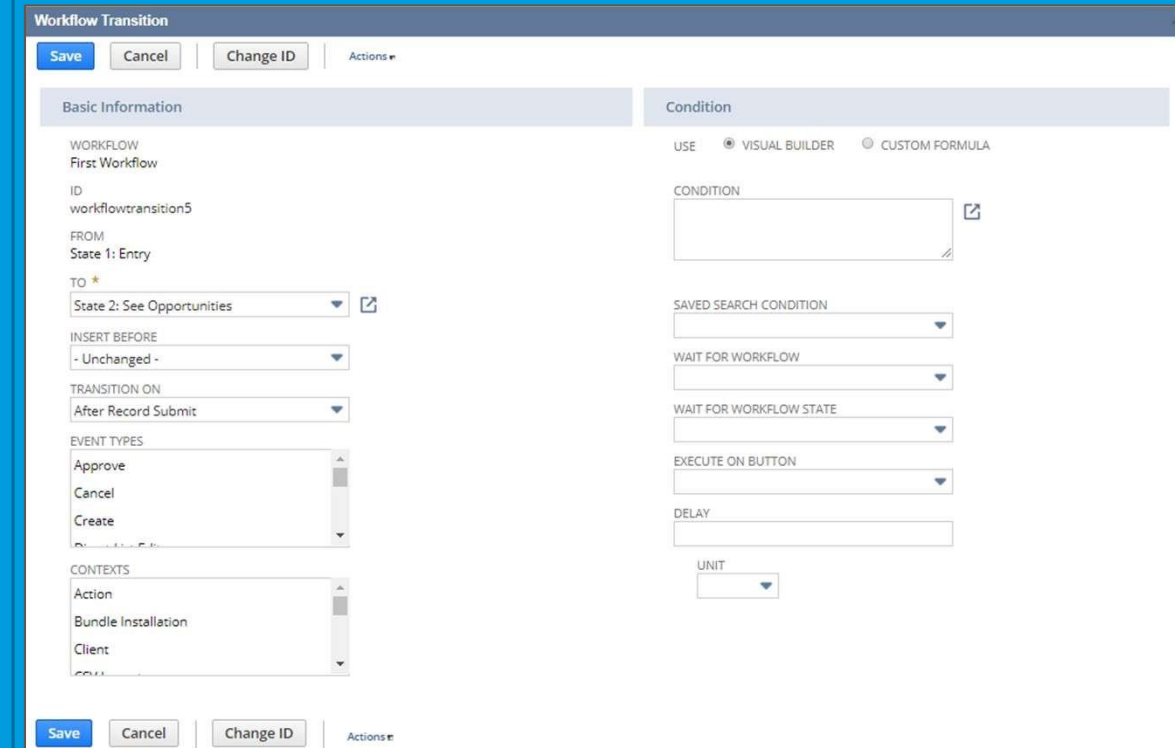
Below the form is a navigation bar with tabs: 'Display' (selected), 'Validation & Defaulting', 'Sourcing & Filtering', and 'History'. Under the 'Display' tab, there is an 'INSERT BEFORE' dropdown menu showing '- Unchanged -' and a 'HELP' text area. At the bottom, a note states: 'Looks and acts like other custom fields'.

Transitions move workflows between states

Edit Transitions in Workflow Editor



Define Transition Trigger and Conditions



Workflow Transition

Buttons: 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, ...

CONTEXTS: Action, Bundle Installation, Client, ...

Condition

USE: ☒ VISUAL BUILDER ☐ CUSTOM FORMULA

CONDITION: [Empty field with icon]

SAVED SEARCH CONDITION: [Dropdown]

WAIT FOR WORKFLOW: [Dropdown]

WAIT FOR WORKFLOW STATE: [Dropdown]

EXECUTE ON BUTTON: [Dropdown]

DELAY: [Field]

UNIT: [Dropdown]

Buttons: Save, Cancel, Change ID, Actions

Polling Question # 5

Benefits of a Workflow Field

- A. Cleaner forms
- B. Store data needed as reference for WF action(s)
- C. Reduce complexity in conditions

D. All of the Above

Workflow Demo: Single Step Approval

- Journal Entry Approval
 - Start with template (optional)
 - Allow to transition directly to approved if source is integration
 - Allows for rejection and reapproval
 - Save approver to custom field
 - Send emails when approved/rejected

NETSUITE DEMO

Single Step Approval

Polling Question # 6

What is the most common cause of a Record transitioning but not executing field change(s)?

A. Mandatory Field incomplete

B. Send Email Action

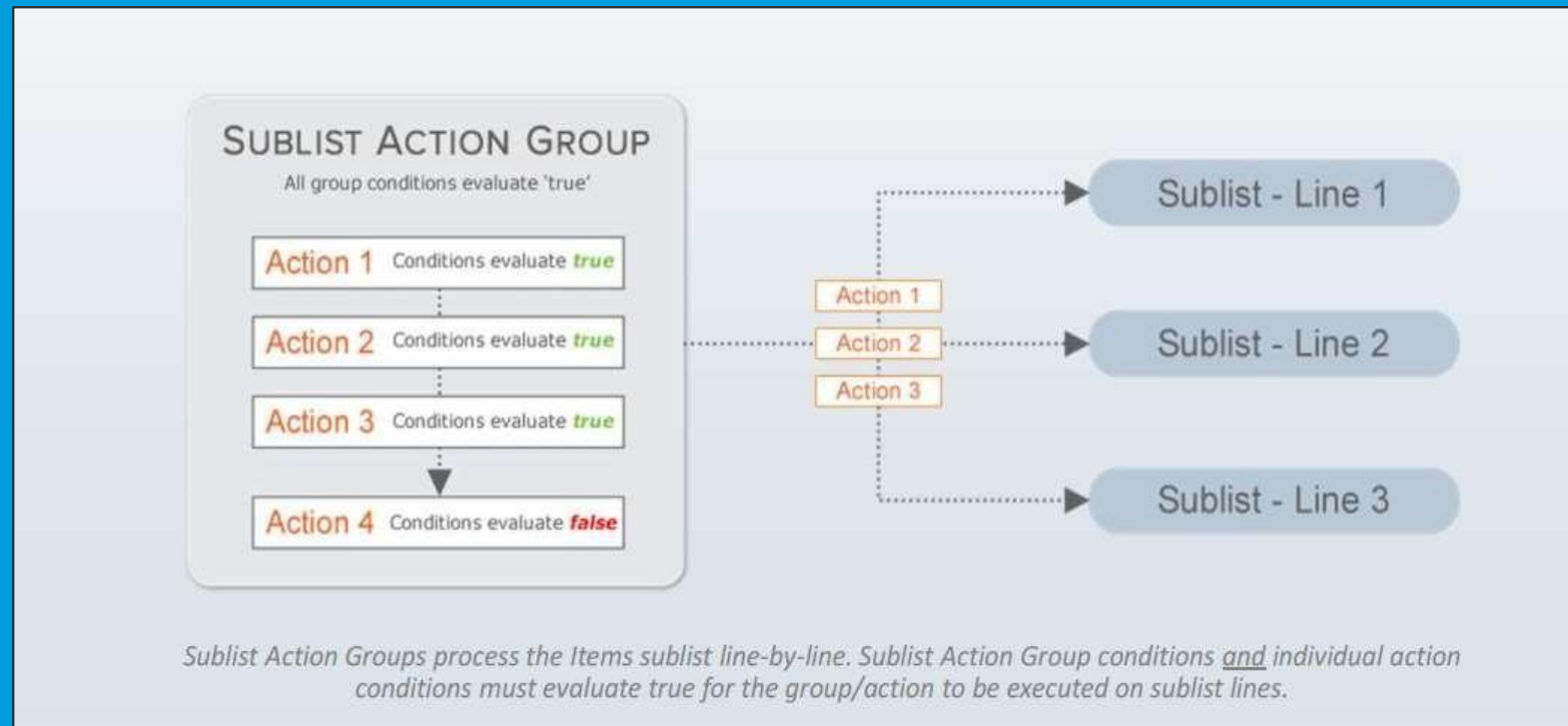
C. Closed Browser

D. Logged Out of NetSuite

Sublist Actions

- 1 Accessing the sublist is done by creating a sublist action groups. Only sublist available is items sublist
- 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)

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

Sublist Actions

Polling Question # 7

Sublist actions can set line level values on a journal entry

True / False

Workflow Demo: Scheduled Workflow & Summary Search Fields

- Saved Search Field
 - Summary Search allows ability to dynamically calculate value on record and store in custom field (SA: 31727)
 - Requires Summary Type set on search results
 - Filter set to record Internal ID
 - Assign Search to Custom Field
 - Field must be non-stored to allow for dynamic calculation
- Scheduled Workflow – To Store Value

NETSUITE DEMO

Source Summary Search Value to Stored Field

Polling Question #8

Non-stored saved search fields are referenceable in a saved search

True / False

Thank You



Questions & Answers





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