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

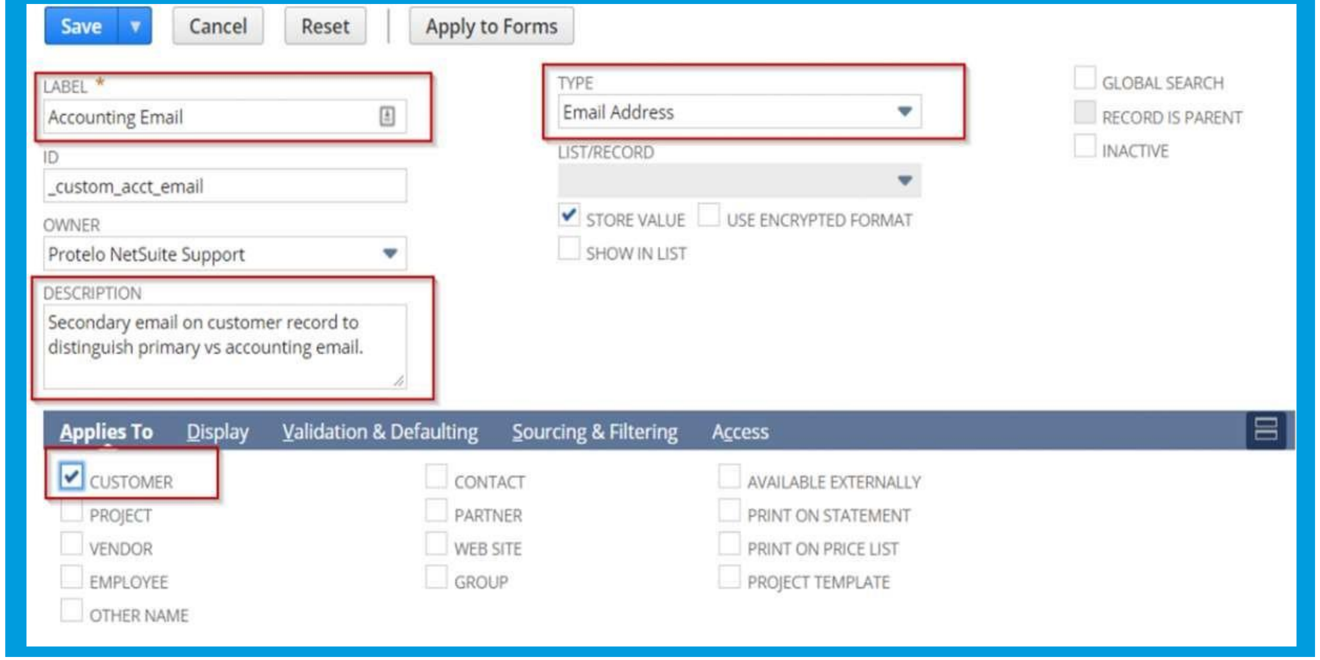
Workflows are more accessible

- 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

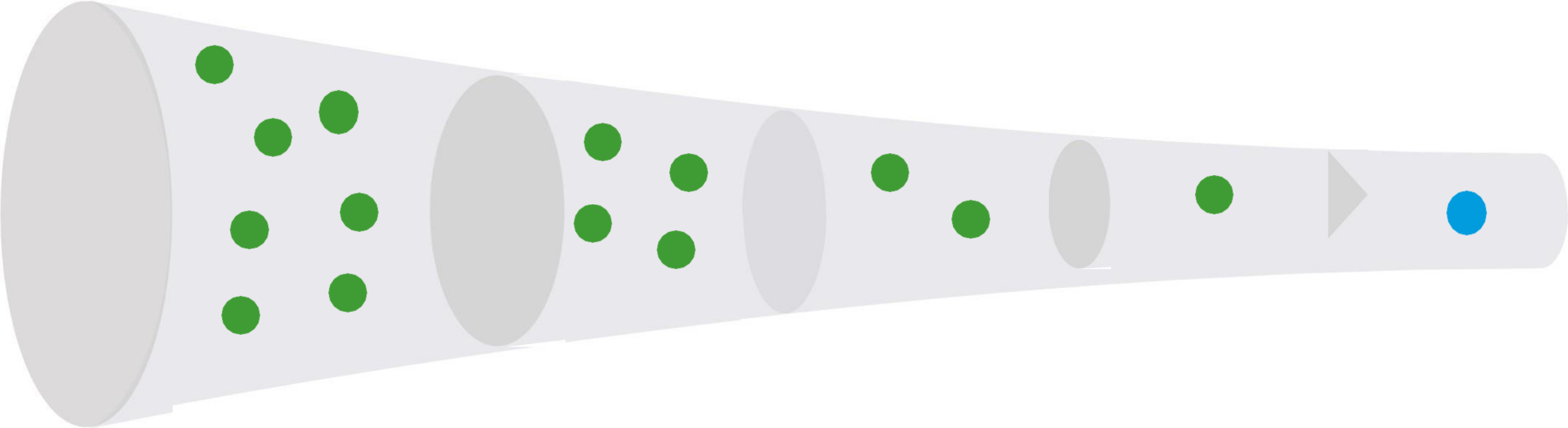
1. Allows for default value
2. Ability to source from associated record
3. Can set field display type

Custom Entity Field



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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Overview of SuiteFlow

Managing Existing Workflows

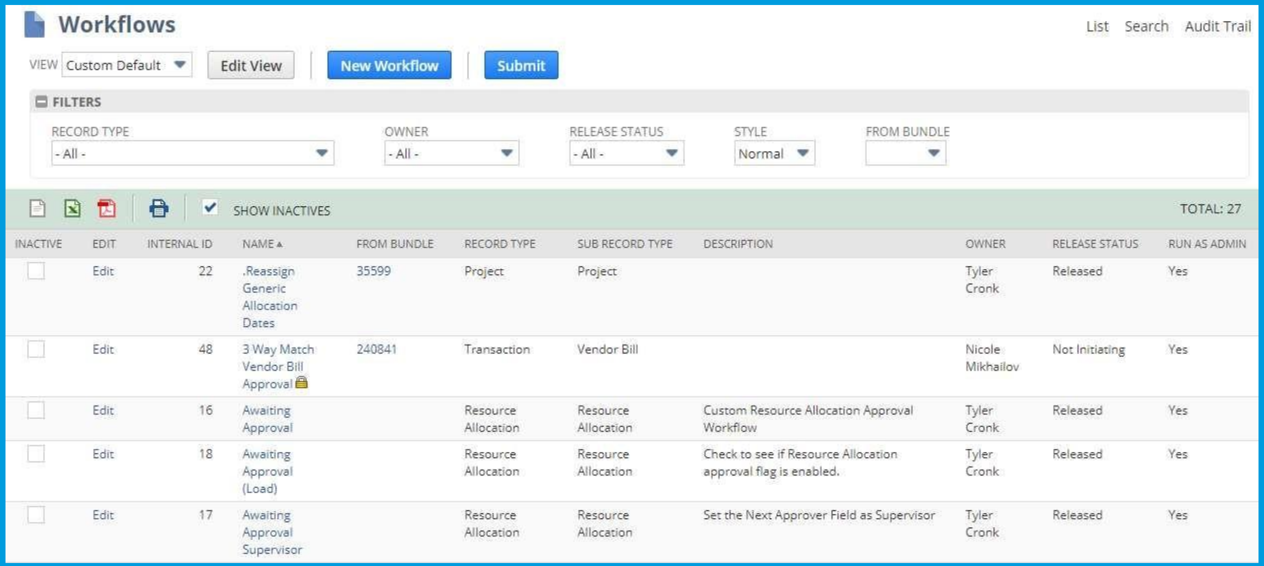
Workflow Demonstrations

Question and Answer

Utilize the workflow list to manage workflows

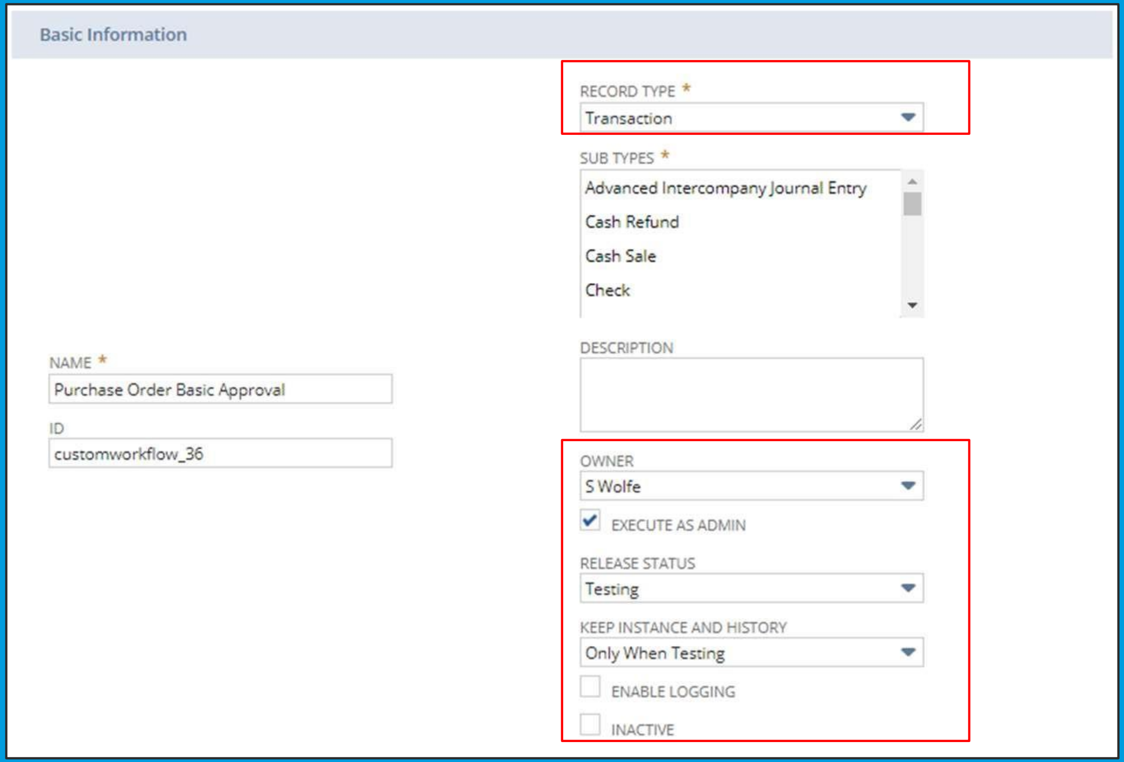
- Page can be customized
- Native Filters
  - Record Type
  - Owner
  - Release Status
  - From Bundle
- Customize as a saved search with Edit View

Existing Workflow List



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



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

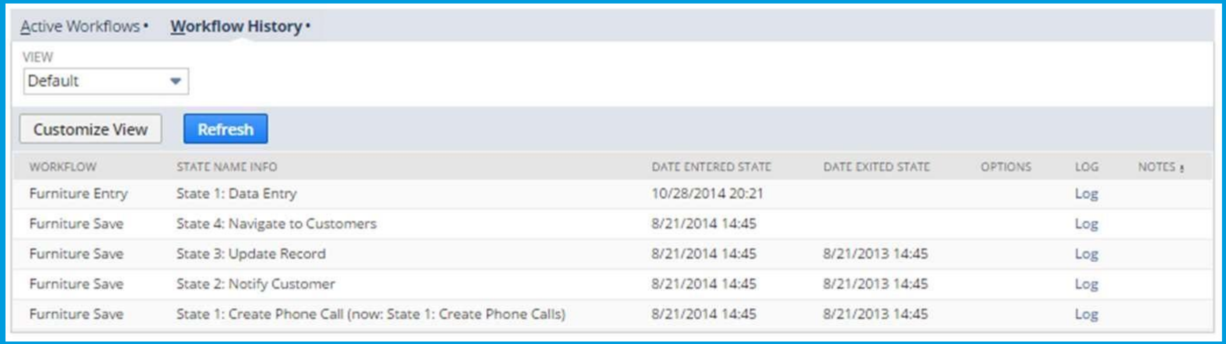
1. Located on the record workflow is running on

2. Instance records are generated every time a workflow starts

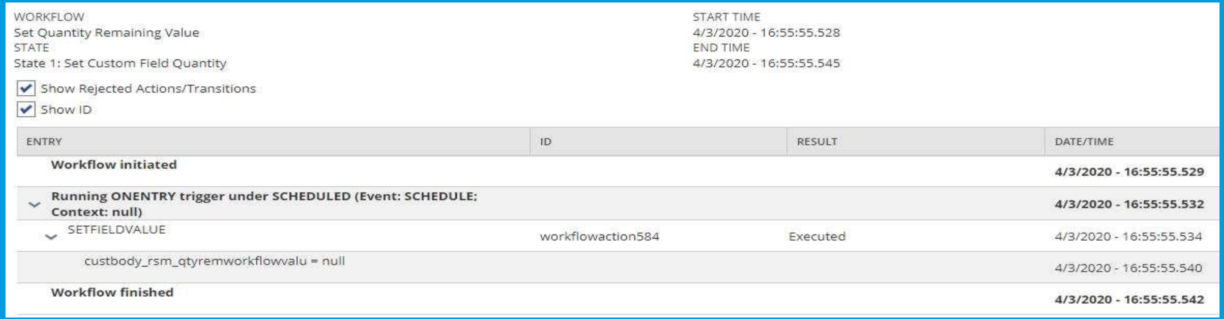
3. History records are generated for every state the the workflow enters

4. Enable logging to view the actions and transitions performed by the workflow and validate conditions

Workflow history



Workflow log



Handling in process workflows is also part of workflow management

1 Cancelling a single instance

2 Mass updates for workflows

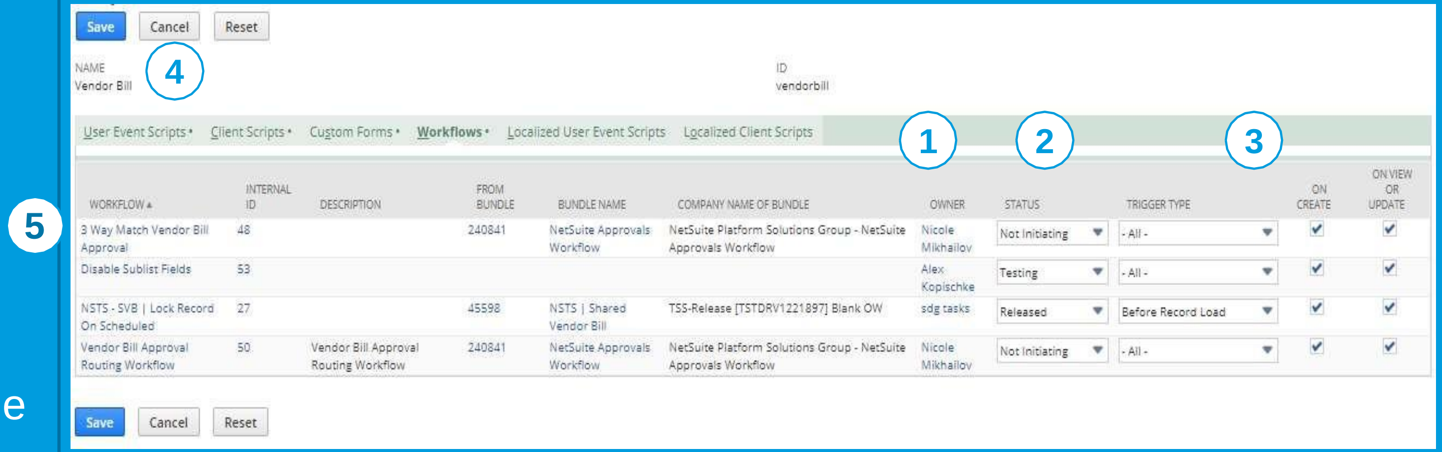
Update Type	Outcome
Initiate	Ability to execute workflow across many records at one time
Processing	Execute transition from current state to next state
Transitioning	Execute transition outside of the defined path
Canceling	Ability to cancel workflow across many records at one time

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

Vendor Bill Scripted Records Page

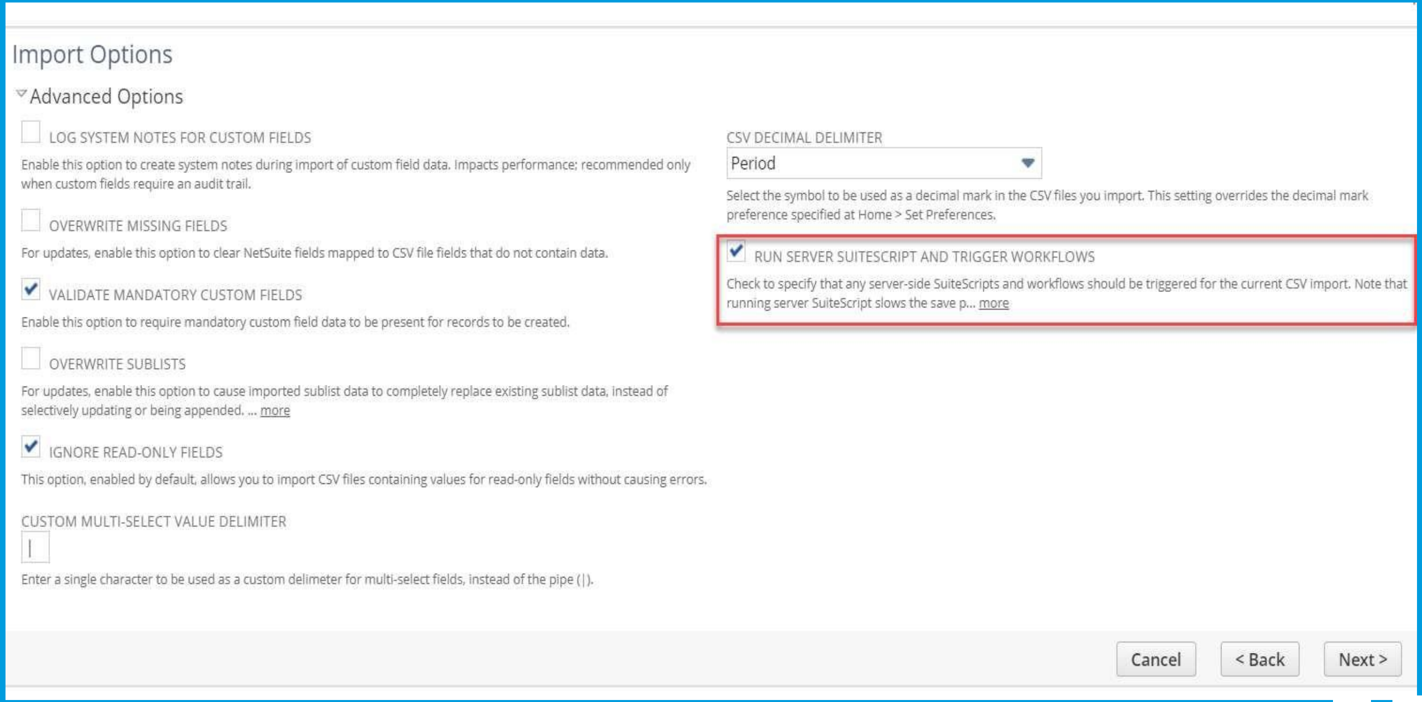


Run server SuiteScript and trigger workflows on Import

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



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

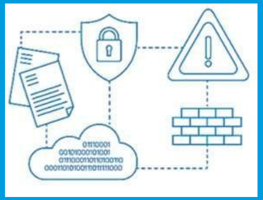
Managing Existing Workflows

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

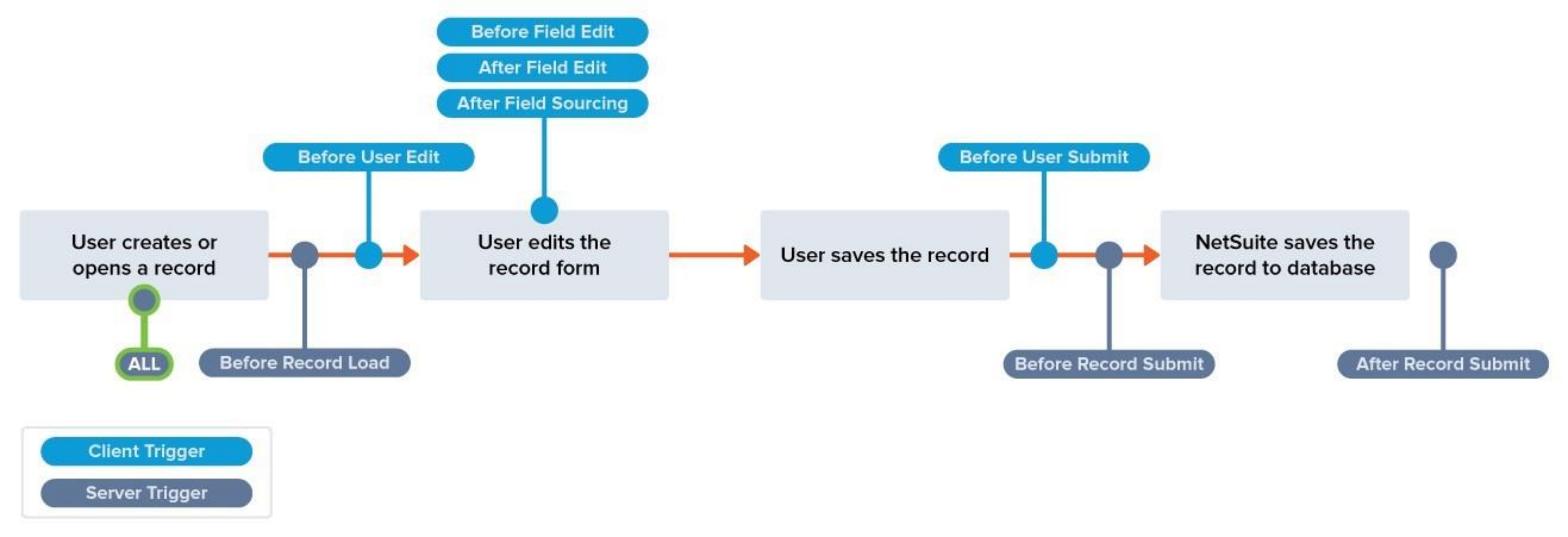
Completion: end goal of the flow

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

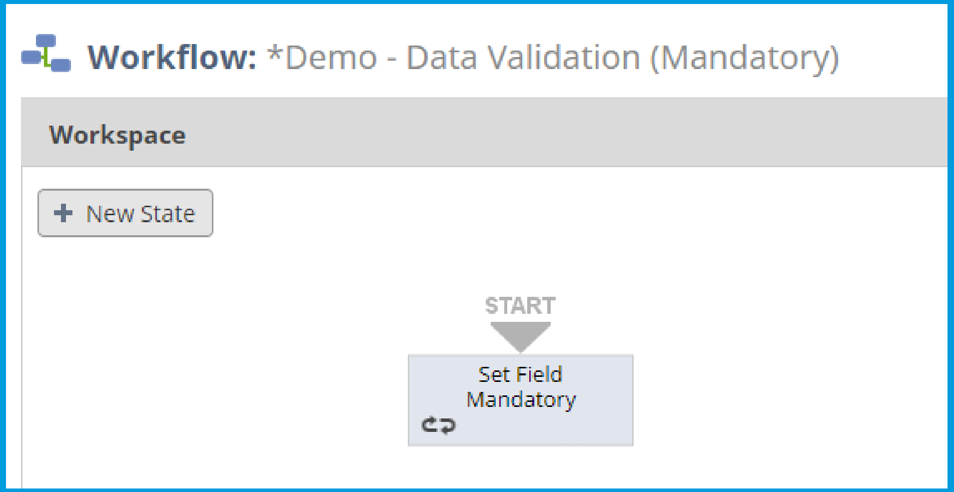
Client triggers execute when a user interacts with a record form in NetSuite. You can view the client triggers used for actions for a specific workflow state under Form Event on the State subtab of the context panel.

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

Workflow Diagramed



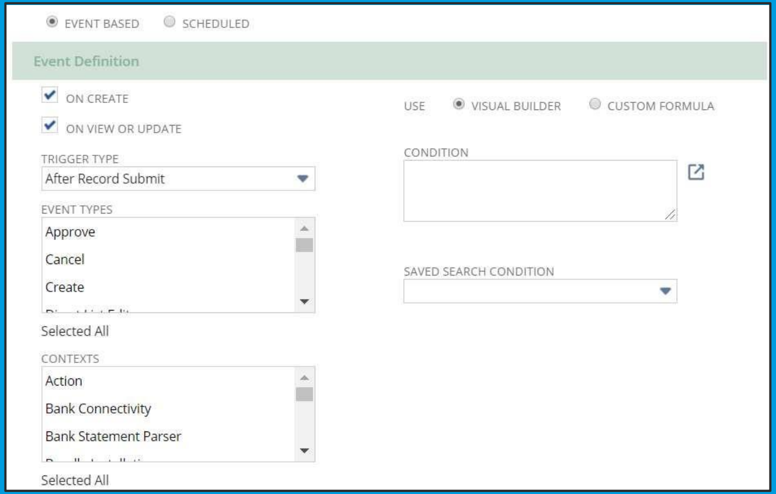
NETSUITE DEMO

Data Entry Validation

Initiation specifies the input to kickoff a workflow

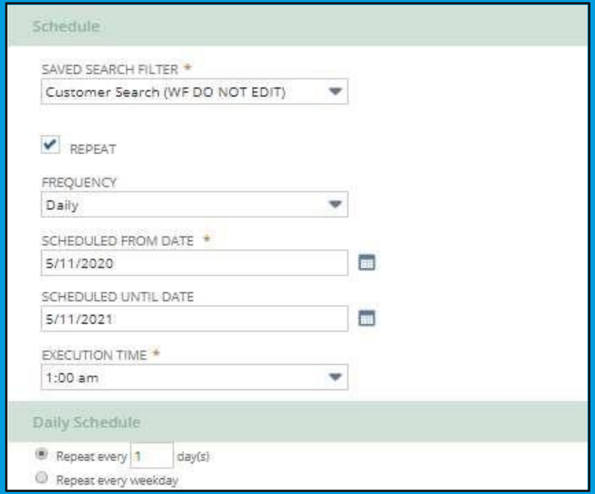
Event based

- Select Trigger Type
- Event Type
- Context



Scheduled

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



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

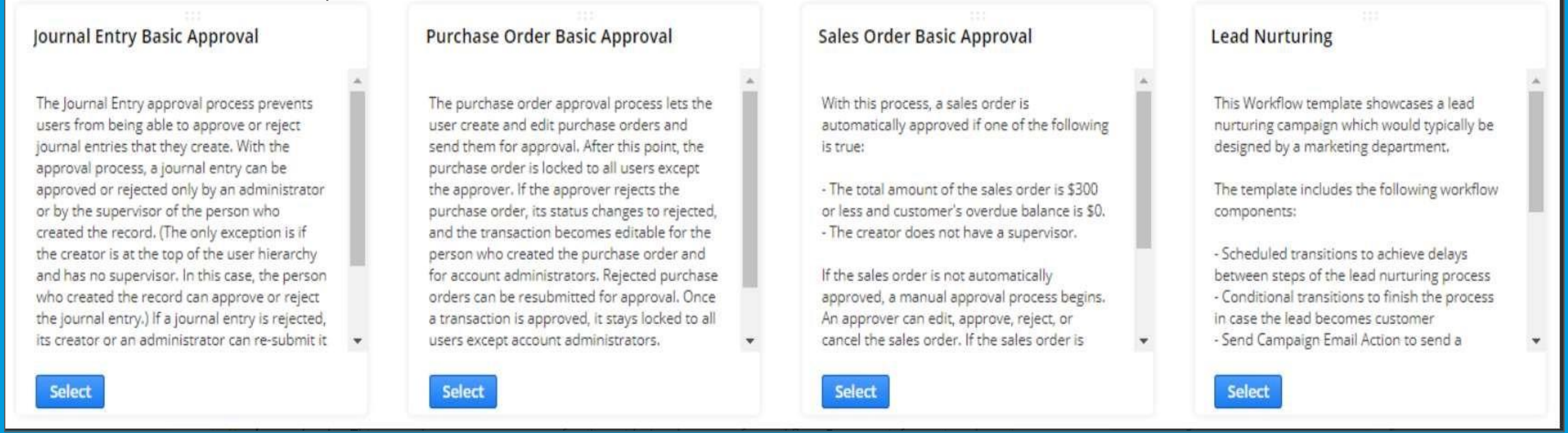
Polling Question # 4

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

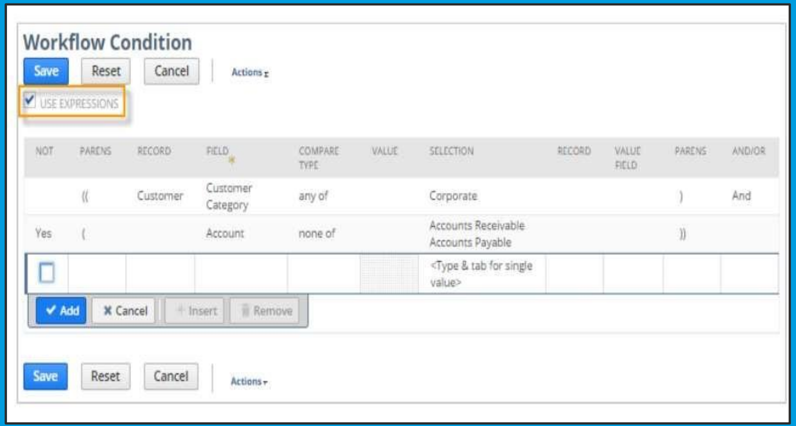


Building conditions creates more dynamic workflows

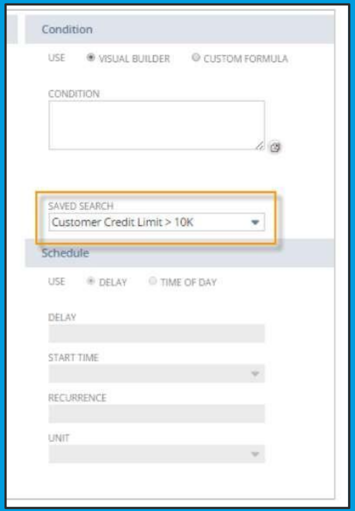
Conditions can be built based on three methods

1 Formula

2 Expression



3 Search



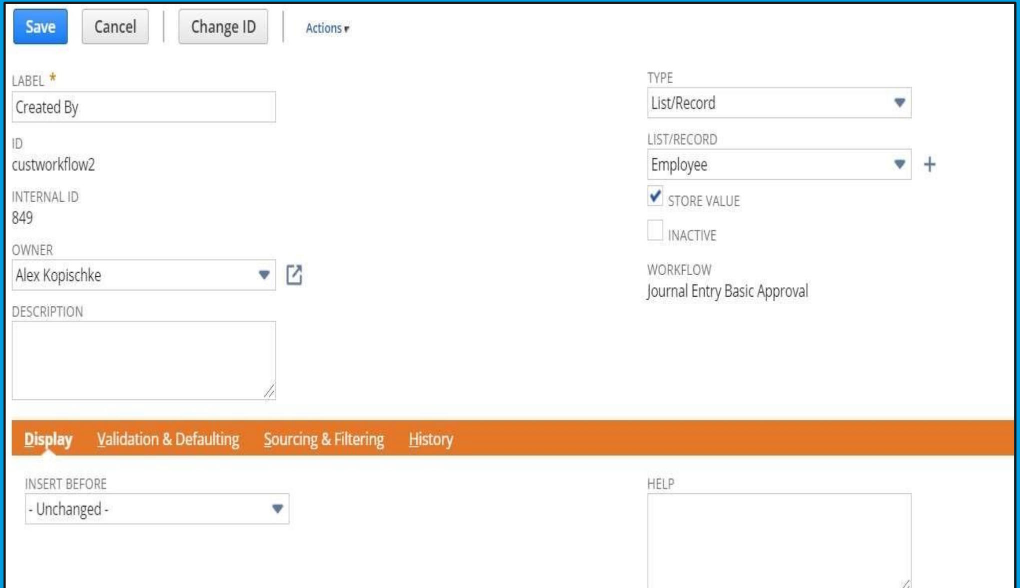
Workflow and state fields allow for saving and using values within a workflow

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

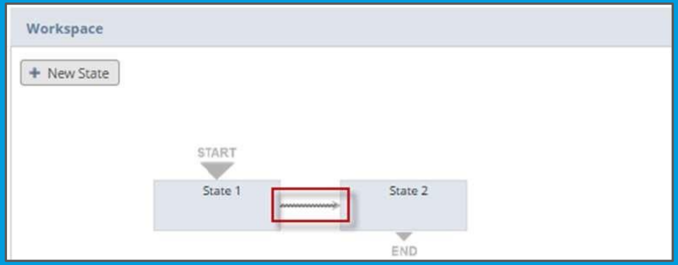
- Applies to single state in a workflow
- Can only be used within the state the field is applied to
  - Fewer use cases



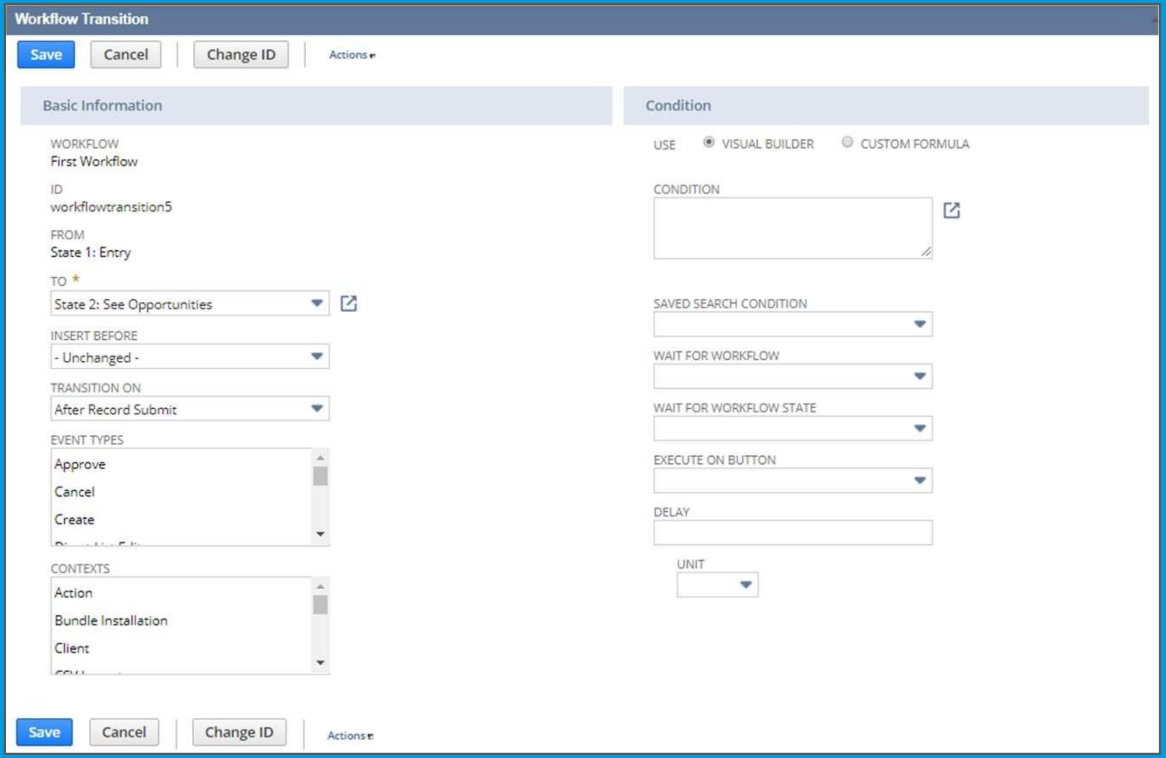
Looks and acts like other custom fields

Transitions move workflows between states

Edit Transitions in Workflow Editor



Define Transition Trigger and Conditions



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

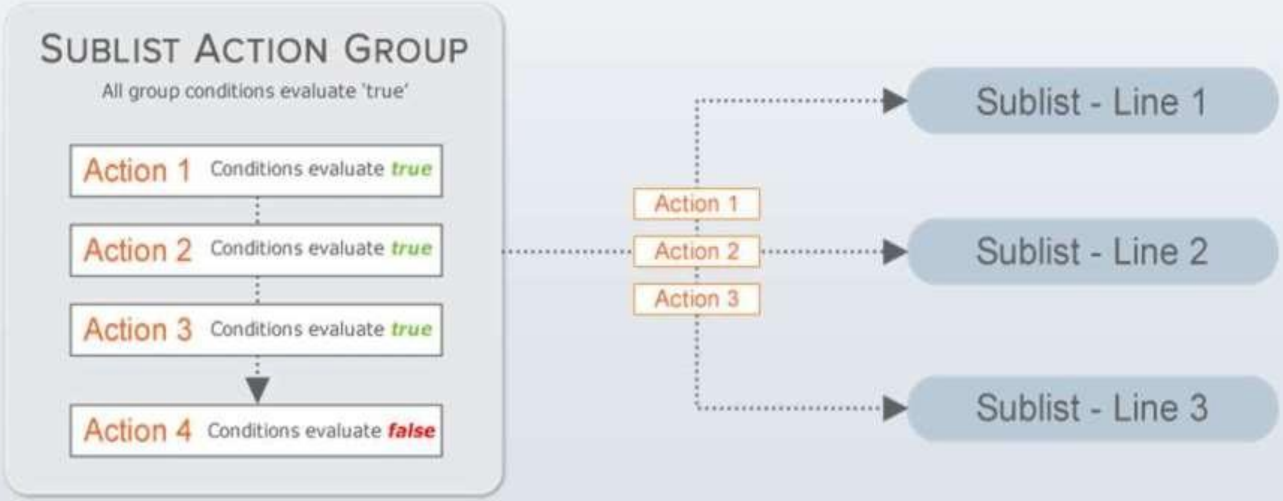
C. Closed Browser

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



Sublist Action Groups process the Items sublist line-by-line. Sublist Action Group conditions and individual action conditions must evaluate true for the group/action to be executed on sublist lines.

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 / $\boxed{\text{False}}$

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 / $\boxed{\text{False}}$

Thank You

Questions & Answers

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ASSURANCE | TAX | CONSULTING