

CUSTOMIZING NETSUITE

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Introduction to Customizations

SAID = SuiteAnswers article ID

Go to SuiteAnswers and search for the ID number

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 FIELDS

2

- CUSTOM LISTS

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- CUSTOM FORMS

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- CUSTOM RECORDS

CUSTOM FIELDS

SAID 10092

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

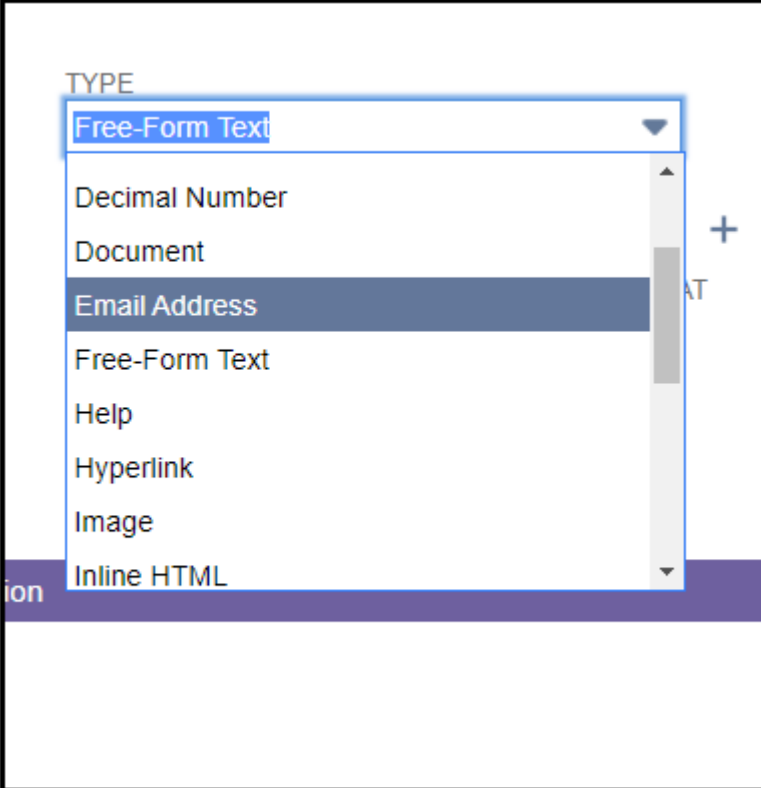
Used to add fields to serial and lot numbered inventory records to track information specific to each item or workflow unique to your business. For example, quality control procedures or recall information could be tracked.

OTHER RECORD FIELDS

Used to add fields to custom records not defined by the above categories, including campaign events, classes, competitors, departments, and locations.

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



SAID 10085 – Table of Custom
Field Type Descriptions

Custom Entity Field

▼

LABEL *

ID

OWNER
Cory Anderson ▼

DESCRIPTION

▼

Applies To
☐ CUSTOMER
 ☐ CONTACT
 ☐ PROJECT
 ☐ PARTNER
 ☐ VENDOR
 ☐ GENERAL
 ☐ WEB SITE
 ☐ EMPLOYEE
 ☐ GROUP
 ☐ OTHER NAME

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

CUSTOM FIELDS: APPLIES TO

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

- 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'

CUSTOM FIELDS: DISPLAY

OWNER
Cory Anderson

Applies To **Display** Validation & Defaulting Source

INSERT BEFORE
- Unchanged -

SUBTAB

DISPLAY TYPE
Normal

DISPLAY WIDTH

Save & Apply to Forms Cancel Reset

- 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

SAID 10097

CUSTOM FIELDS: DISPLAY

Applies To **Display** Validation & Defaulting Sourcing &

INSERT BEFORE
- Unchanged -

SUBTAB

DISPLAY TYPE
Normal

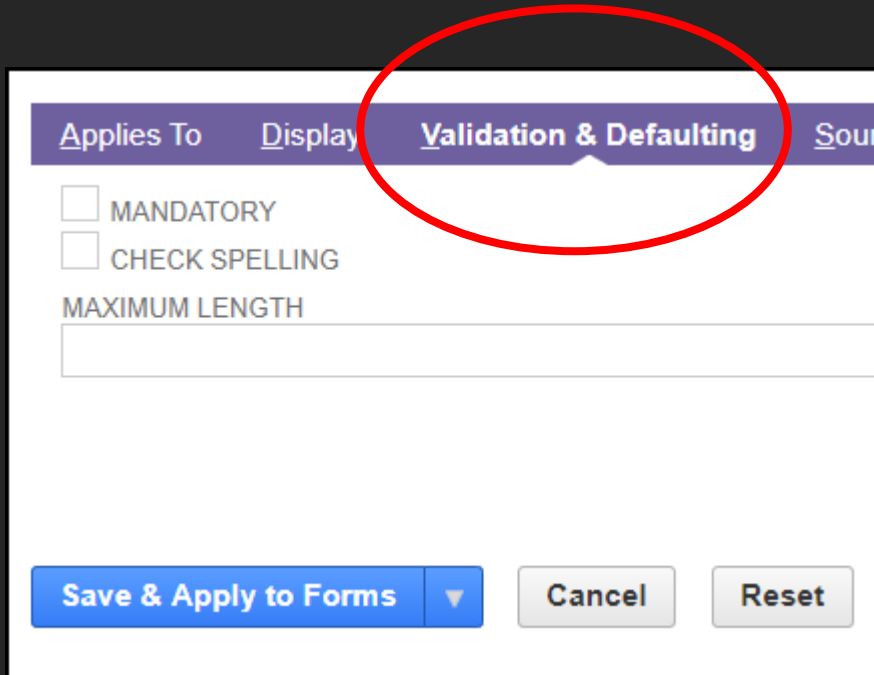
WIDTH HEIGHT
DISPLAY SIZE

Save & Apply to Forms Cancel Reset

- 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

SAID 10097

CUSTOM FIELDS: VALIDATION AND DEFAULTING



Applies To Display **Validation & Defaulting** Source

☐ MANDATORY

☐ CHECK SPELLING

MAXIMUM LENGTH

Save & Apply to Forms ▼ Cancel Reset

- The options here depend on the field type
- Mandatory
 - Makes the field required on the forms it applies to
 - Alternate option is to modify a specific form to make a field required
- Some common options
 - Maximum Length
 - Minimum Value
 - Maximum Value

CUSTOM FIELDS: VALIDATION AND DEFAULTING

The screenshot shows a configuration window titled "E ENCRYPTED FORMAT". It contains three main sections: "DEFAULT VALUE" with a text input field and a "FORMULA" checkbox; "SEARCH" with a dropdown menu; and "FIELD" with a dropdown menu. The "FORMULA" checkbox is currently unchecked.

- 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

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

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.

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.

Applies To Display Validation & Defaulting Sourcing & Filtering **Access** Translation

DEFAULT ACCESS LEVEL
Edit

DEFAULT LEVEL FOR SEARCH/REPORTING
Edit

Role Department Subsidiary

ROLE* ACCESS LEVEL* LEVEL FOR SEARCH/REPORTING*

| ROLE* | ACCESS LEVEL* | LEVEL FOR SEARCH/REPORTING* |
|-------|---------------|-----------------------------|
| | | |

✓ Add ✕ Cancel + Insert 🗑 Remove

Save & Apply to Forms Cancel Reset Apply to Forms



Custom Item Field

Save



Cancel

Apply to Forms

LABEL *

ID

OWNER

Cory Anderson

DESCRIPTION

TYPE

Free-Form Text

LIST/RECORD



STORE VALUE



USE ENCRYPTED FORMAT



SHOW IN LIST

Time for a Demonstration

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

Translation



INVENTORY ITEM



NON-INVENTORY ITEM



SERVICE



EXPENSE ITEM



OTHER CHARGE



GROUP



KIT/PACKAGE



SUBTYPE BOTH



PURCHASE



SALE



PRINT ON PRICE LIST



SUBSCRIPTION PLAN



SELECT INDIVIDUAL ITEMS

DROPSHIP_Samsung Odyssey G9 Ultrawide Monitor
EXP_Business Insurance
EXP_Project Travel Expenses
INV_ASUS PG348Q RoG SWIFT 34" Curved 21:9 QHD IPS Monitor
INV_Brocade 7800 Extension Switch

INCLUDE CHILD ITEMS

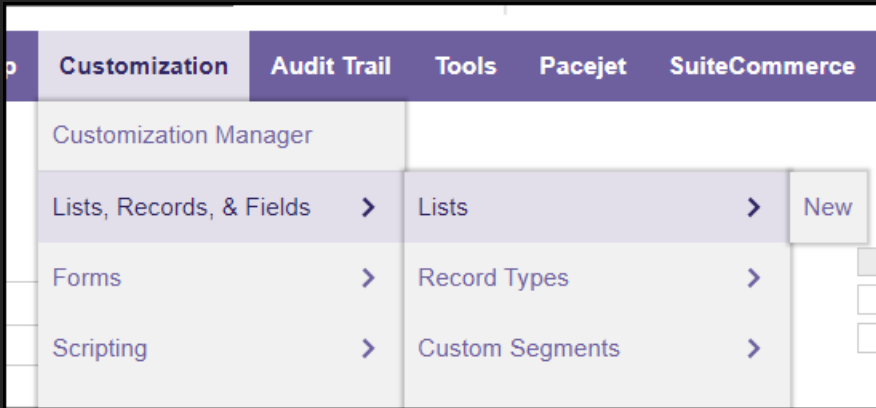
Save



Cancel

Apply to Forms

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

[Save](#) [Cancel](#) [Reset](#)

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 |
| |

[Add](#) [Cancel](#) [Insert](#) [Remove](#)

[Save](#) [Cancel](#) [Reset](#)

Time for a Demonstration

Custom List

Save

Cancel

NAME *

ID

OWNER

Cory Anderson

DESCRIPTION

SHOW OPTIONS IN: ☒ THE ORDER ENTERED ☐ ALPHABETICAL ORDER

☐ INACTIVE

Values Translation

VALUE *

INTERNAL ID

✓ Add

✕ Cancel

+ Insert

🗑 Remove

Save

Cancel

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 | | |
|    <input type="checkbox"/> 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

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

- 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 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

Email | Phone | Address

Customer

Tom Dale Tom Dale

Edit

Back

Accept Payment

Print

Actions

Primary Information

CUSTOMER ID

Tom Dale

MR./MS...

NAME

Tom Dale

JOB TITLE

COMPANY NAME

Tom Dale

Email | Phone | Address

EMAIL

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

Subtabs: Field Groups, **Fields**, Actions, Sublists, QuickView, Custom Code, Roles

Main • Relationships • Sales • Marketing • Financial • Preferences • System Information •

Move To Top Move To Bottom New Field

| DESCRIPTION | SHOW | QUICK ADD | MANDATORY | DISPLAY |
|----------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------|
| Custom Form | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Normal |
| Name/ID | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Normal |
| Auto Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Name (when Numbered) | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Inline Text |
| Type | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Mr./Ms... | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Name | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Furigana | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Job Title | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Company Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal |
| Parent | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Status | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | Normal |
| Probability | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Sales Rep | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Partner | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |
| Web Address | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Normal |
| Category | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Normal |

- 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.

Subtabs Field Groups Fields **Actions** Subli

Standard Actions • Custom Actions

The following buttons are not supported in point-and-click customization or in

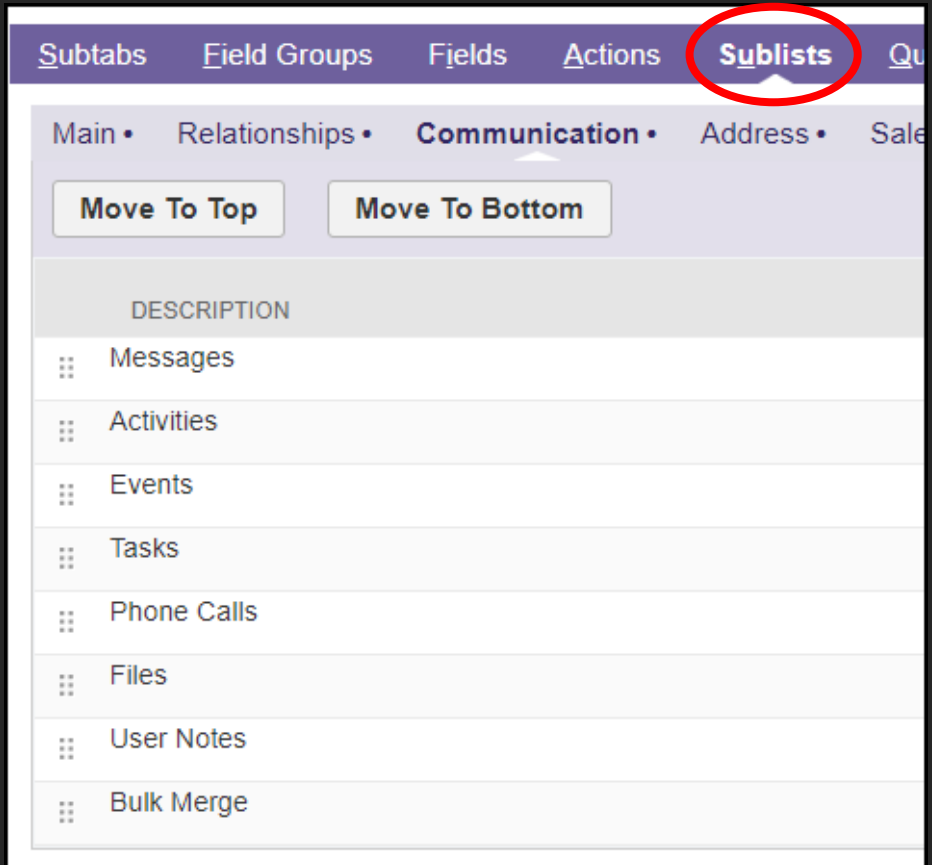
| ACTION NAME ▲ |
|---------------------|
| Accept Payment |
| Delete |
| Generate Price List |
| Generate Statement |
| Make Copy |
| Merge |
| New |
| Save & New |
| Save & Next |
| Save As |
| Search |

| | 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

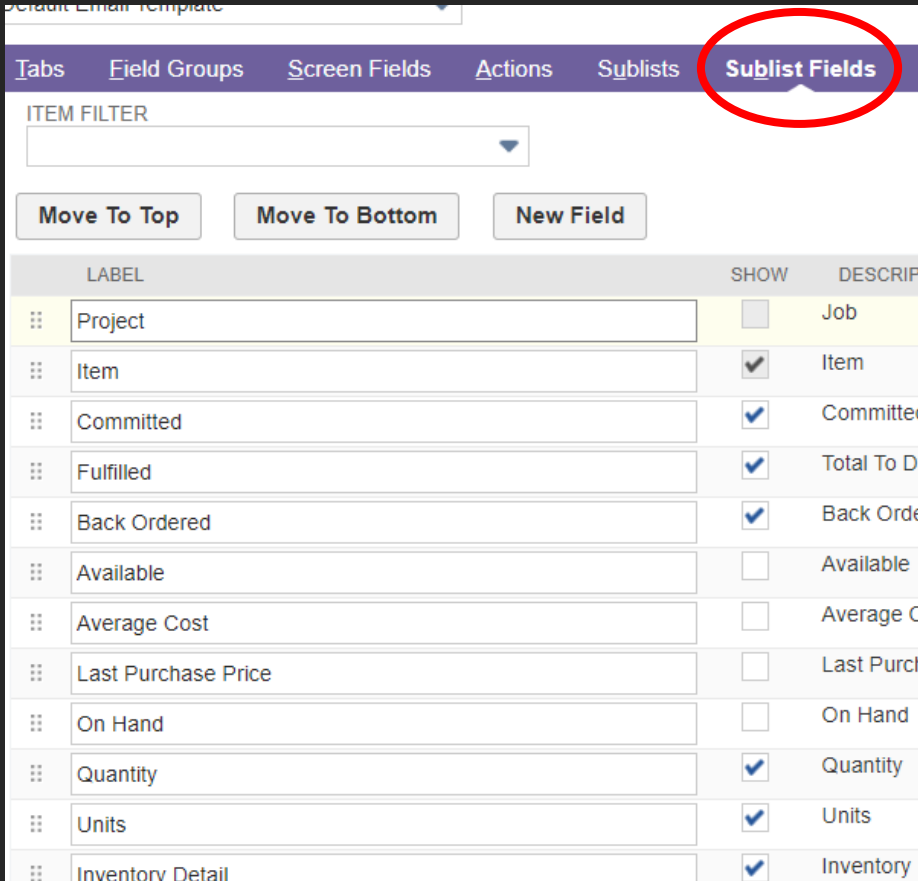
- **Actions**
 - Determines the actions that can be performed by users when viewing a record that uses this form
 - Can be set to shown as a Button or in the Actions drop-down menu

CUSTOM FORMS: SETTINGS



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

CUSTOM FORMS: SETTINGS

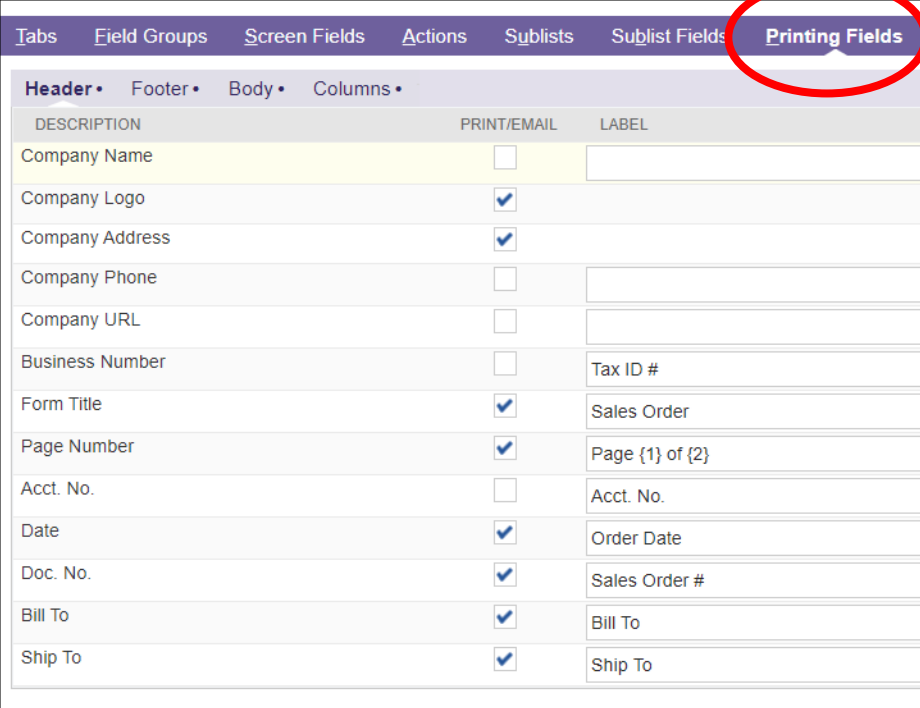


| | LABEL | SHOW | DESCRIP |
|---|---------------------|-------------------------------------|------------|
| ⋮ | Project | <input type="checkbox"/> | Job |
| ⋮ | Item | <input checked="" type="checkbox"/> | Item |
| ⋮ | Committed | <input checked="" type="checkbox"/> | Committed |
| ⋮ | Fulfilled | <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 |

- 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

- 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

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

- 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 Transaction Form

Save

Cancel

Save & Move Elements

NAME *

Custom Sales Order - Cash Sale

ID

TYPE

Sales Order

PRINTING TYPE ☒ ADVANCED ☐ BASIC

PRINT TEMPLATE

NOAM FF PRM - Sal...PDF/HTML Template

EMAIL TEMPLATE

ATLAS SW Primary ...Advanced PDF/HTML

EMAIL MESSAGE TEMPLATE

Default Email Template

DISCLAIMER

ADDRESS

Time for a Demonstration

[No Title]

Tabs

Field Groups

Screen Fields

Actions

Sublists

Sublist Fields

QuickView

Custom Code

Roles

Linked Forms

Move To Top

Move To Bottom

DESCRIPTION

SHOW

LABEL

:: Items

✓

Items

:: Promotions

✓

Promotions

:: Shipping

✓

Shipping

:: Billing

✓

Billing

:: Accounting

✓

Accounting

:: Relationships

✓

Relationships

:: Communication

✓

Communication



CAC



OUR TRUSTED ADVISORS

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

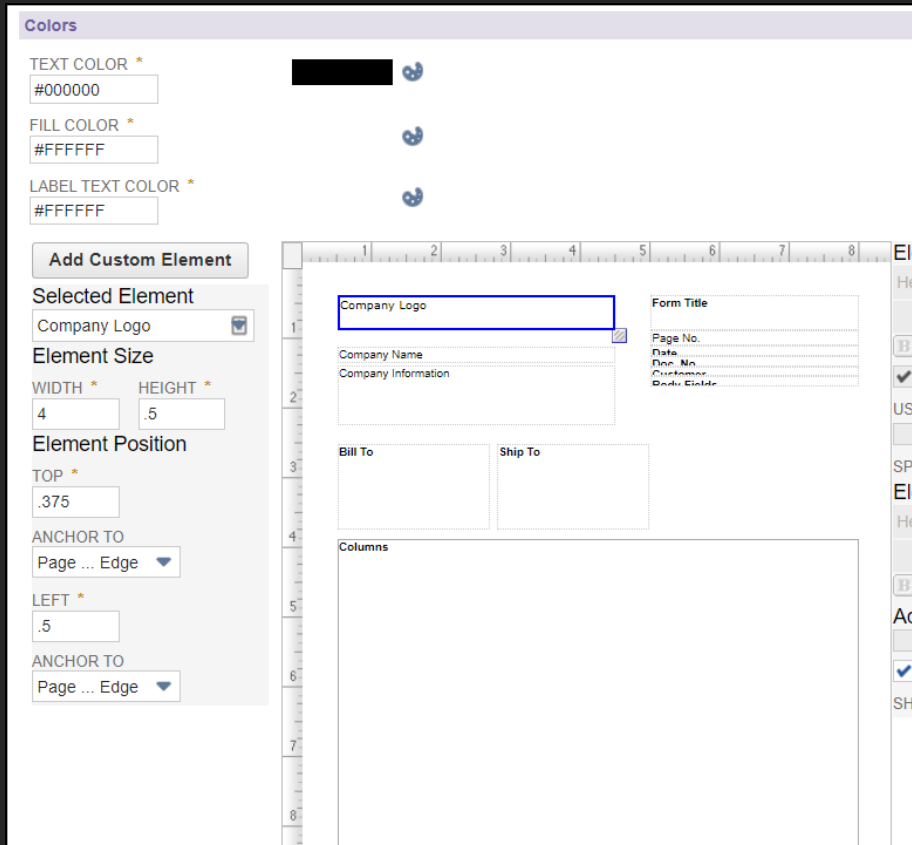
PRINT TEMPLATE
Standard Sales Order PDF/HTML Template ▼

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



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

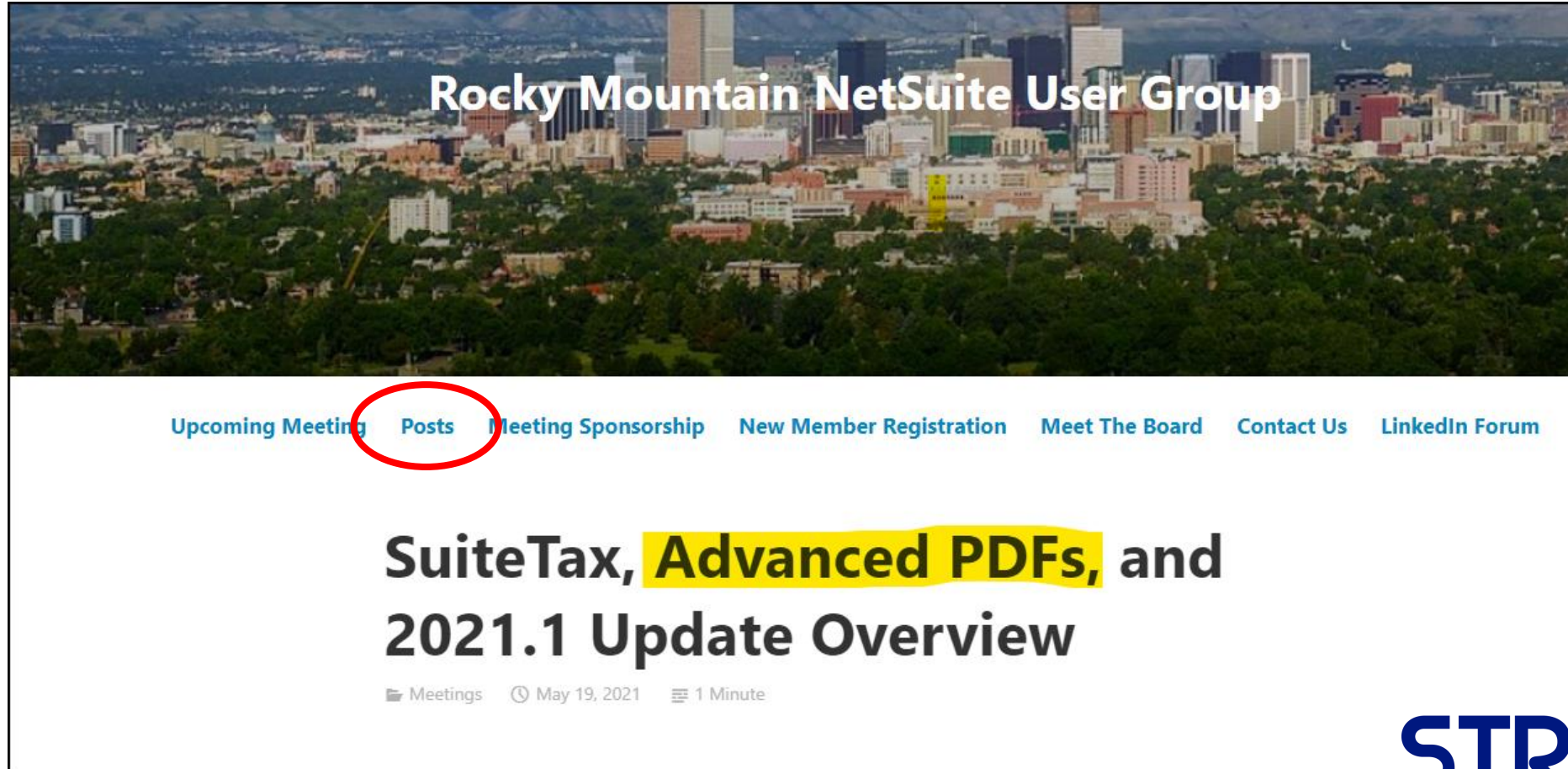
New Element Styles Source Code Preview

+ T Image Table Code HTML File PDF Table Laptop

| | | | |
|-------------------------|---------------------|---------------------------------------|---------------|
| 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/>





Save

Template Setup

Cancel

New Element

Styles

Time for a Demonstration



Company Name

Address

Title

#Transaction Number

Date

Vendor: Vendor

Subsidiary: Subsidiary

Due Date: Due Date

Terms: Terms

`${record.item@label}/${record.expense@label}`

| <code>\${record.item[0].item@label}/\${record.expense[0].account@label}</code> | <code>\${record.item[0].quantity@label}</code> | <code>\${record.item[0].taxrate1@label}</code> | <code>\${record.item[0].tax1amt@label}</code> | <code>\${record.item[0].taxrate2@label}</code> | <code>\${record.item[0].rate@label}</code> | <code>\${record.item[0].amount@label}</code> |
|--|--|--|---|--|--|--|
| Item | Quantity | <code>\${item.taxrate1}</code> | <code>\${item.tax1amt}</code> | <code>\${item.taxrate2}</code> | Rate | Amount |

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

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 *

- 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

TYPE

List/Record

LIST/RECORD

Transaction



STORE VALUE



USE ENCRYPTED FORMAT



SHOW IN LIST



GLOBAL SEARCH



RECORD IS PARENT



INACTIVE



APPLY ROLE RESTRICTIONS

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'

Custom Record Type

Save



Cancel

NAME *

ID

ORIGINATING CUSTOM SEGMENT

OWNER

Cory Anderson

DESCRIPTION

☒ INCLUDE NAME FIELD

☐ SHOW ID

SHOW CREATION DATE ☐ ON RECORD ☐ ON LIST

SHOW LAST MODIFIED ☐ ON RECORD ☐ ON LIST

SHOW OWNER ☐ ON RECORD ☐ ON LIST ☐ ALLOW CHANGE

ACCESS TYPE

Require Custom Rec...Entries Permission

☒ ALLOW UI ACCESS

☐ ALLOW MOBILE ACCESS

☒ ALLOW ATTACHMENTS

☒ SHOW NOTES

☐ ENABLE MAIL MERGE

☐ RECORDS ARE ORDERED

☒ SHOW REMOVE LINK ☐ ALLOW CHILD RECORD EDITING ☐ ALLOW DELETE

☐ ALLOW QUICK SEARCH

Time for a Demonstration

Subtabs

Sublists

Icon •

Numbering •

Permissions

Links

Managers

Translation

TITLE *

✓ Add

✕ Cancel

+ Insert

Remove

▲ Move Up

▼ Move Down

⬆ Move To Top

⬇ Move To Bottom

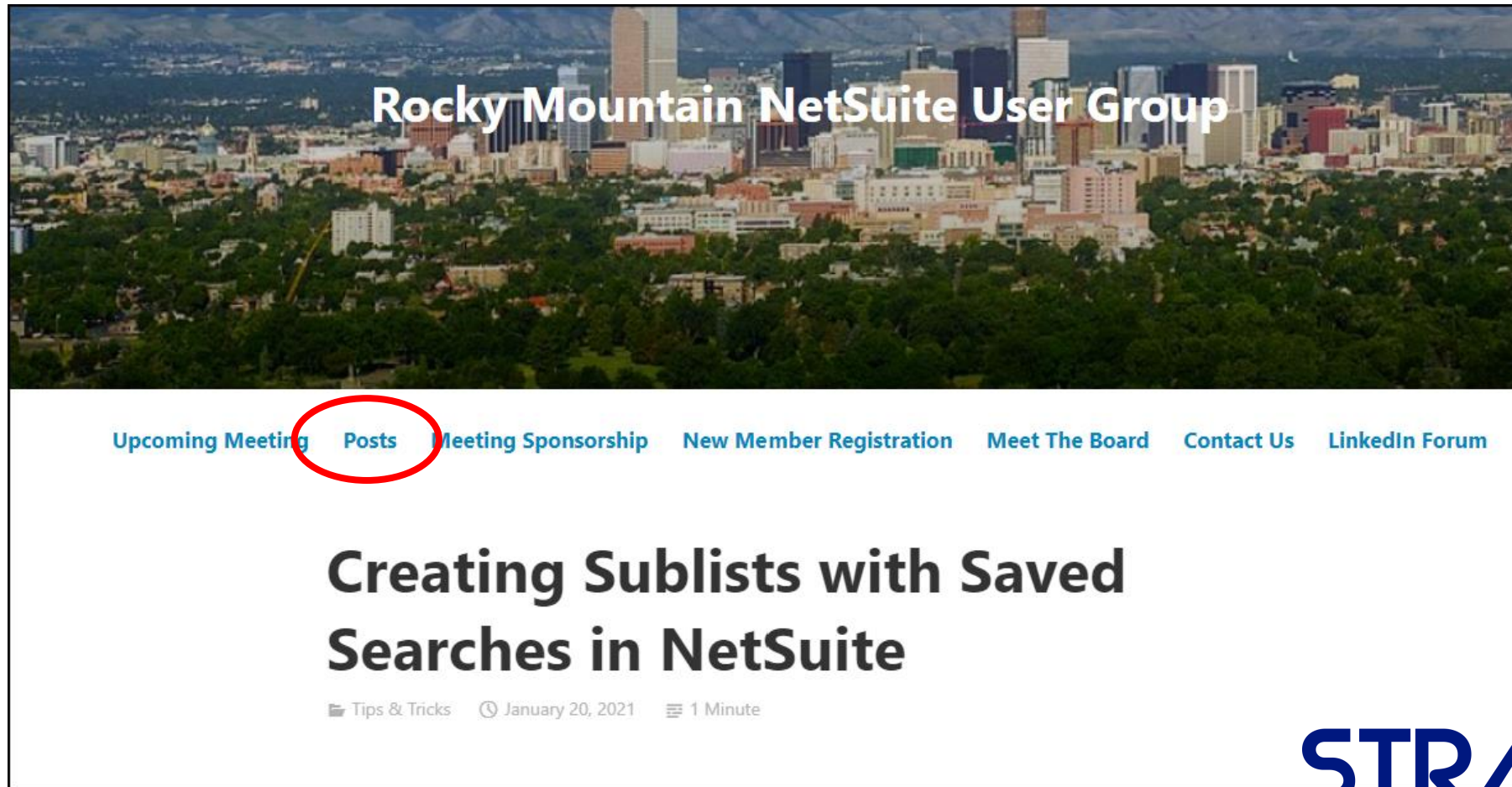
Save



Cancel

NOTEWORTHY: SUBLISTS

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



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

- ALBERT EINSTEIN

Thank you!



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