CUSTOMIZING NETSUITE

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Essential and Advanced Customization Techniques

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v2.0

CPE Learning Objectives

Upon completion of this session, participants will be able to:

01 Identify Custom Field Types

Identify the different types of custom fields available in NetSuite and select the appropriate field type based on data requirements.

02 Apply Field Configuration Best Practices

Apply best practices for validation, defaulting, sourcing/filtering, and access to maintain data integrity and control visibility.

03 Distinguish and Configure Custom Forms

Distinguish between entry and transaction forms, and configure form settings to align with business processes and user roles.

04 Describe Custom Record and List Structures

Describe how to create and structure custom records, including parent-child relationships, and how to use custom lists to enforce consistent, pre-determined values across records — extending NetSuite's functionality to fit your business.

Agenda

1 Custom Fields

2 Custom Lists

3 Custom Forms

4 Custom Records

5 Noteworthy Tips

Introduction to Customizations

There are lots of customization options that we will cover today — and some we won't have time for. The goal is to show you what's possible. What you can do with NetSuite's customization features is only limited by your imagination and creativity.

Following Along

- SAID = SuiteAnswers Article ID — go to SuiteAnswers and search for the ID number to find related documentation
- Follow along in your own NetSuite account if you can
- An Administrator role is required to access most of the features covered today

01

Custom Fields

Field types, best practices, display, validation & access

Custom Fields — Types

SAID 10092

Entity Fields

Relationship & employee records — customers, vendors, employees, contacts, partners, groups.

Item Fields

Accounting & website item records — inventory, non-inventory, service, kit, assembly items.

Transaction Body Fields

Body/header of transaction records — sales orders, invoices, POs, journal entries, expense reports.

Transaction Line Fields

Line-item columns of transactions — expense, purchase, sales, store, or opportunity items (aka Custom Columns).

CRM Fields

Activity, marketing & support records — tasks, events, campaigns, cases.

Other Record Fields

Custom records not covered elsewhere — campaign events, classes, competitors, departments, locations.

Custom Fields — Commonly Used Types

SAID 10085 — Table of Custom Field Type Descriptions

Simple Field Types

- Checkbox
- Date
- Currency
- Integer Number
- Decimal Number
- List/Record

Text Field Types & Limits

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 Fields — Best Practices

Understand the Field Type Thoroughly Before Choosing

- What type of data is needed, and how will the data be used?
- Choose wisely — changing the field type later will erase all existing data in the field

Fill In the Values Carefully

- Label — the display name shown to users
- Internal ID — e.g. _example_label, used to reference the field in scripts and searches
- Description (internal use) and Help (external use) — document the field's purpose
- Apply to Forms — control which forms the field appears on

Custom Fields — Applies To & Display

Applies To

- Different options 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 'Apply to Forms' to control exactly where the field displays — it also surfaces related transaction types (e.g., Cash Sale under 'Sale')

Display

- Insert Before — defines where the field is placed on records
- Subtab — where the field appears by default
- Display Type — Normal (editable), Inline Text (not editable), Disabled (not editable, hidden if empty), Hidden (not shown, not for field-level security)
- Display Size — width/height options for applicable field types
- Help — describe the field's purpose and how the data is sourced or calculated

Custom Fields — Validation & Defaulting

Validation

- Available options depend on the field type
- Mandatory — makes the field required on the forms it applies to (or make it required on a specific form instead)
- Common options: Maximum Length, Minimum Value, Maximum Value

Defaulting

- Default Value — static or a calculation using the formula field; visible on Saved Search results and usable in Workflows
- Search — defines results from a Saved Search calculation; more powerful than Formula, but not visible on Saved Search results or usable in Workflows unless stored

www.RMNSUG.org/posts — search "Dynamic Field"

Custom Fields — Sourcing, Filtering & Access

Sourcing & Filtering

- Allows you to source the contents of a custom field from a related record
- Example: sourcing the Country from the Customer record onto a transaction

Access

- Controls who can see and/or edit a field — restrict by Role, Department, or Subsidiary
- Useful for controlling access to sensitive information or fields that apply only to specific people
- Also handy for testing new fields before a wider rollout

Time for a Demonstration

02

Custom Lists

Pre-determined value options for uniform, workflow-ready data

Custom Lists

- Used to create a custom field with pre-determined value options
- Maintains uniformity in data across records
- Allows you to use the selected values to trigger other actions — such as workflows

Time for a Demonstration

03

Custom Forms

Entry & transaction forms, settings, and printing

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 Common Record Types

Start with the pre-built form, make a new version, and customize it.

Remove Unused Fields

The goal should be clean, uncluttered information relevant to your business processes.

Use a Consistent Naming Convention

e.g., Stratos Sales Order, Stratos Purchase Order, Stratos Customer.

Custom Forms — Settings (Part 1)

Store Form With Record

Ensures records are viewed and edited with this form, regardless of who is viewing or editing.

Form Is Preferred

The default form used, unless forms are set at the role level.

Use For Pop-Ups

Use this form in pop-ups when adding a record of this type from another record.

Field Groups

The field grouping shown on a record — the first subtab represents the subtab, with groups listed below it.

Fields

Shows/hides fields on the form, organizes and groups them, and sets mandatory status and display type (form-specific).

Custom Forms — Settings (Part 2)

Actions

Determines actions users can perform on a record using this form — shown as a Button or in the Actions drop-down.

Sublists

Determines which sublists are available on the form — e.g., Relationships, Communication, Addresses, Related Records.

Sublist Fields & Item Filter

Rename or change visibility of sublist fields (Fields subtab on Entry forms, Sublist Fields subtab on Transaction forms). Item Filter limits available items via a Saved Search.

Linked Forms

Transaction forms only — determines forms used automatically with related records when a transaction starts with this form.

Time for a Demonstration

Custom Forms — Printing

Printing Basics

- Applies to transaction forms only
- Choose from Advanced or Basic printing type — Basic is enabled by default on all transaction forms
- Printing Fields (Basic type only) — choose which fields print, by section: Header, Footer, Body, Columns
- Transaction Form PDF Layouts — WYSIWYG editor to add/remove elements and change layout (limited functionality)

Advanced PDF/HTML

- WYSIWYG style editor to modify forms
- Also includes a code-based editor for full layout control
- Uses the FreeMarker language
- Very flexible and highly customizable
- Tip – use AI to customize

rmnsug.org — SuiteTax Advanced PDFs & 2021.1 Update Overview

Time for a Demonstration

04

Custom Records

Bridging NetSuite's gaps for your specific business needs

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 meet your specific business needs.

Examples

Rejection Record

Employee Training Courses

Customer Survey

Events

What other examples come to mind for your business?

CPE Question 8 of 8

When setting up a new custom record, which setting ensures the system-assigned ID number is visible and searchable?

A Include Name Field

B Show ID

C Record Is Parent

D Default Value

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' on that field

Time for a Demonstration

Noteworthy: Sublists

Creating Sublists with Saved Searches

A powerful technique for surfacing related, search-driven data directly on a record's sublists — well worth exploring further.

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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