ERP PARTNERS

NetSuite Workflows (SuiteFlow)

Training & Best Practices

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NetSuite Workflow Architecture & Automation

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CPE Learning Objectives

By the end of this course, participants will be able to:

01 Overview of Workflow Options

Identify and differentiate the workflow options available within NetSuite and select appropriate tools for specific business scenarios.

02 Common Use Cases

Describe common workflow use cases and how they are applied across core business functions.

03 Leveraging AI with Workflows

Demonstrate how Claude AI can be used to design a NetSuite workflow and generate a custom workflow action script to extend automation capabilities.

04 Real-World Examples

Apply concepts from real-world workflow examples to design or enhance automated business processes within their own NetSuite environment.

Agenda

1

Overview of Workflows

2

Workflow UI Walkthrough

3

Best Practices

4

Demonstrations

5

Custom Workflow Actions

Overview — Workflows vs. Scripting

Choosing the right automation tool for the job

✦ Workflows

Strengths

- Visual, no-code configuration
- Built-in audit trail & history
- Easier for admins to maintain
- Native approval routing
- Scheduling built-in

Limitations

- Less flexible than scripts
- Complex logic can be cumbersome
- Limited to supported record types

VS

✦ SuiteScript

Strengths

- Full programmatic control
- Handles complex business logic
- Works on any record/event
- Supports external integrations

Limitations

- Requires developer skill (or does it?)
- Harder to audit & troubleshoot
- Changes require deployments

Overview — Common Workflow Use Cases

Where workflows deliver the most value in NetSuite

Transaction Approval

Route Sales Orders, POs, or Bills through multi-level approvals based on amount, department, or class

Data Entry Validation

Enforce required fields, format rules, and business constraints before records are saved

Scheduled Field Updates

Automatically update field values on a recurring schedule (e.g., reset status flags, calculate deadlines)

Dynamic Field Display

Show or hide fields and sub-lists based on record state, user role, or field values

Conditional Email Alerts

Send targeted notifications to customers, reps, or managers when specific conditions are met

Custom Form Buttons

Add action buttons to forms that trigger workflow transitions or initiate downstream processes

Workflow UI Walkthrough

Design · Primary Setup · States · Actions · Transitions

Workflow UI — Primary Setup

Key configuration fields when creating a new workflow

1	**Record Types**	Define which NetSuite record types this workflow applies to
2	**Release Status**	Testing → use 'Testing'; live deployments set to 'Released'
3	**Keep Instance & History**	Controls audit retention — recommended to set to 'Always'
4	**Enable Logging**	Essential for troubleshooting; always enable in all environments
5	**Initiation**	Event Based (triggered by user action) vs. Scheduled (time-driven)
6	**Event Definition**	Specifies which record event fires the workflow (Before/After Submit, etc.)
7	**Scheduled Log**	Track scheduled execution history for debugging and compliance

Workflow UI — States, Actions & Transitions

The three building blocks of every workflow

States

- Represent stages in the business process
- Records exist in exactly one state at a time
- Each state contains its own set of actions
- Use clear, descriptive names (e.g., 'Pending Approval')

Actions

- Executed when entering, exiting, or during a state
- Examples: Set Field Value, Send Email, Go to Record
- Actions can be conditional using formula criteria
- Go to the Help Center for a full action library

Transitions

- Move the record from one state to another
- Triggered by button clicks or automatic conditions
- Can include entry criteria and condition formulas
- Control the flow and decision points in the process

Best Practices

Proven guidance to keep workflows reliable, auditable, and maintainable

Using Claude AI to Design NetSuite Workflows

Claude AI

Your workflow design co-pilot

Claude can help you move from a vague business requirement to a fully structured workflow design — including states, actions, transitions, and even custom SuiteScript — in minutes.

The more specific your prompt, the better the output. Include record types, triggers, and conditions.

1 Step 1 — Describe Your Business Requirement

Tell Claude what you need in plain English — the record type, trigger event, and desired outcome.

Example: "I need a workflow on Vendor Bills that routes for approval when the amount exceeds $5,000."

2 Step 2 — Ask Claude to Design the Workflow Structure

Ask Claude to output a full workflow design with named States, Actions within each state, and Transition conditions.

Example: "Design this as a NetSuite workflow. List each State, the Actions, and Transition criteria."

3 Step 3 — Request a Custom Workflow Action Script

When native actions fall short, ask Claude to write the SuiteScript 2.1 Custom Workflow Action.

Example: "Write a CWA script that looks up the department manager and sets them as the approver."

4 Step 4 — Review, Refine & Build in NetSuite

Build flow in NetSuite. Enable logging, test in sandbox via Mass Update on a small record set.

Iterate with Claude by sharing error messages or results — it can help you troubleshoot on the spot.

Best Practices

Follow these guidelines for every workflow you build

Execute as Admin

Always enable 'Execute as Admin' to prevent permission errors when the workflow fires for restricted users

Keep Instance & History

Set to 'Always' — retaining full history is critical for audits, debugging, and compliance reviews

Always Enable Logging

Enable logging in all environments, not just production — invaluable for catching issues during testing

Test Scheduled Workflows

Use a first-run record limit of 20–25 records to safely validate scheduled logic before full deployment

Initiate via Mass Update

To test a non-scheduled workflow manually, use a Mass Update targeting a small record set — no code needed

Review Before You Build

Before creating a new workflow, review existing ones — adding functionality to an existing flow is almost always better than creating a new one

Demonstrations

Live examples of workflows in action

Examples to Demonstrate

Hands-on walkthroughs of real-world workflow implementations

1 Sales Order Confirmation

Trigger a branded confirmation email to the customer when a Sales Order is approved and saved

2 Source Custom Field Calc

Populate a calculated custom field by sourcing values from related records or applying formula logic at save

3 Vendor Bill Approval

Route Vendor Bills through a configurable approval chain based on amount thresholds and department

4 Populate Custom HTML Field

Dynamically build and set an HTML-type custom field to display rich formatted content on a form

Custom Workflow Actions

Extending native workflows with SuiteScript-powered custom actions

Custom Workflow Action Ideas

Powerful capabilities that go beyond native workflow actions

Threshold-Based Dynamic Approver Lookup

Query a custom approval matrix record to determine the correct approver at runtime based on amount, department, and location — far more flexible than native approval routing

Round-Robin Assignment

Assign a record to the next rep in a rotation sequence stored on a custom record — ideal for balanced lead or case distribution

Escalation with Deadline Awareness

Check business hours and SLA clocks, then escalate only if an approval has been pending past a calculated deadline — respects calendars and time zones

Populate Custom Field with Calculation

Execute complex multi-record calculations at workflow runtime and write the result back to a custom field — any logic that can be scripted can be a custom action

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Thank You

Questions & Discussion

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