

ScaleNorth NetSuite MasterClass – Session 2 – Workflows

11/15/2024

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Agenda

- ▲ Introductions
- ▲ Quick ScaleNorth Overview
- ▲ NetSuite Workflows MasterClass
 - [Workflow Overview](#)
 - Use Cases/Examples
 - [Approval Workflow](#)
 - [Sending Email Workflow](#)
 - [Dynamically Setting Required Fields via Workflow](#)
 - [Live Q&A to ask your questions](#)
- ▲ Next Steps

Introductions



Charles Stevenson

Vice President of Sales

- Managed Sales Teams for Two Fortune 500 Companies over two decades
- BS Accounting from USC



Dean Carazza, CPA

Sr. Business Development Manager

dcarazza@scalenorth.com

714-350-6211

- 14 years of experience
- Public and Private Accounting
- 8 years NetSuite Experience
 - 2 Years Private/User - Assistant Controller for \$100M Distributor in Irvine
 - 6 years ScaleNorth
 - Led some of the largest and most complex implementations and integrations. Have done over 20 implementations.
 - Industry experience
 - Manufacturing, E-Commerce and Warehouse/Distribution SaaS, Professional Services

Meet The Team

“

We wanted a partner that could deliver fast solutions, communicate with us and keep us up to date on the status of our ERP project...ScaleNorth covered all of these bases while delivering world-class service. It's been fantastic.

Jerod Schoneman
General Manager, Total Energy Systems



260+
Team
Members



1,250+
Years of Collective
NetSuite ERP
Experience

ORACLE NETSUITE
BPO Partner



650+
NetSuite
Certifications
Held by Staff



7.5+
Avg Years of
NetSuite
Experience

ORACLE NETSUITE
Solution Provider



\$2.5B+
Annual Revenue
Transactions
Processed



58%
Percentage
of staff with
CPAs

ORACLE NETSUITE
SuiteCloud Developer Network

Services at a Glance



NetSuite
Implementation



Outsourced
Accounting



NetSuite
Consulting



Technical
Services

Technology Partners



Disclaimer – purpose of this class is for demonstration/educational purposes. Additionally recommend any configuration and testing always be done in a Sandbox environment first before creating/deploying in production. ScaleNorth is not responsible for any actions not performed by ScaleNorth.

Workflow Overview



Workflow Overview

▲ Overview

- Definition

- A workflow is the definition of a custom business process for a standard or custom record in NetSuite. Business processes can include transaction approval, lead nurturing, and record management. A workflow defines and automates the business process.

- Workflow Elements

▪ States

- › Where the record is in the business process
- › Move from one state to another

▪ Actions

- › The tasks that should be performed in the current state
 - Examples
 - Set a field
 - Add a button

▪ Transitions

- › Define which state should the business process move to next. Decision points usually find in a process flow chart.

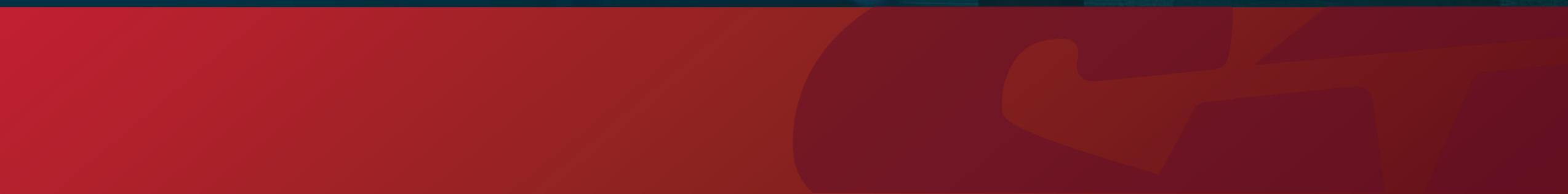
▪ Conditions

- › Actions and transitions can contain conditions that must be met before the action or transitions execute

▪ Triggers

- › Define when a workflow should be initiated, an action run, or a transition occur
 - Three Types of Triggers
 - Trigger Type – Initiates the workflow
 - Trigger On – Initiates an action
 - Transition On – Transitions from one state to another

Approval Workflow



Approval Workflow

▲ Use Case

- In this example, the business process that we want to automate via workflows is the vendor bill approval process. Company policy is that all bills \leq \$10,000 USD should be approved by the AP Manager – Dean Carazza and bills $>$ \$10,000 USD should be approved by the Controller – Carol Morgan.
- What follows are the steps we will take to create the workflow for this process

Approval Workflow

▲ Step 1 – Approval Routing Enabled

- Make sure have Approval Routing Enabled for the transaction type/record that is applicable
 - Example, in this case since we want a Vendor Bill Approval, we want to make sure Approval Routing is enabled for Vendor Bills
 - › Navigate to Setup>Accounting>Accounting Preferences>

The screenshot displays the 'Accounting Preferences' configuration page. The 'Approval Routing' tab is selected, and the 'VENDOR BILLS' checkbox is checked. A navigation menu on the right shows the path: Setup > Accounting > Accounting Preferences.

Accounting Preferences

Save Cancel

General Items/Transactions Order Management Projects Time & Expenses **Approval Routing**

Approval Routing

- EXPENSE REPORTS
- PURCHASE ORDERS
- VENDOR BILLS
- VENDOR PAYMENTS
- VENDOR PREPAYMENTS
- RESOURCE ALLOCATIONS
- TIME BILLS
- INVOICES
- REVENUE ARRANGEMENTS
- JOURNAL ENTRIES

Save Cancel

Setup Implementation Administration and Controls SuiteApps Support

- Setup Manager
- Company >
- Accounting >**
- Tax Audit Files >
- Sales >
- Marketing >
- Intranet >
- Import/Export >
- Users/Roles >
- Integration >
- Custom >
- Dashboard Tiles >
- Navigation Portlet >
- Approval Process Manager >
- Employee Directory/Org Browser >
- Services >
- License Client >

SETUP TASKS

- Enter Opening Balances
- Accounting Lists >
- Expense Categories >
- Expense Report Policies >
- Project Expense Types >
- Billing Classes >
- Billing Rate Cards >
- Project Resource Roles >
- Employee Related Lists
- Shipping
- Order Forms
- Project Profitability

MANAGE G/L

- Chart of Accounts >
- Manage Accounting Periods >

PREFERENCES

- Accounting Preferences**

Approval Workflow

▲ Step 2 – Form has Native Approval Fields Showing

- Review related transaction form to see if has native Approval Status Fields and Next Approver displayed/enabled
 - Navigate to Customization>Forms>Transaction Forms
 - Look for the preferred Bill form and click on the name to view

EDIT	INTERNAL ID	NAME ▲	TYPE	SCRIPT	LIBRARY SCRIPT	PREFERRED
Edit	274	SS SVCS PRM - Sales Order	Sales Order			<input checked="" type="checkbox"/>
Edit	272	SS SVCS PRM - Transfer Order	Transfer Order			<input checked="" type="checkbox"/>
Edit	273	SS SVCS PRM - Vendor Bill	Bill			<input checked="" type="checkbox"/>

Custom Transaction Form

[Save](#) [Cancel](#) [Move Elements Between Subtabs](#) [Change ID](#) [Actions](#)

NAME *
SS SVCS PRM - Vendor Bill

ID
custform_ss_svs_mm_vendor_bill

TYPE
Bill

PRINT TEMPLATE
Standard Vendor Bill PDF/HTML Template

EMAIL TEMPLATE
Standard Vendor Bill PDF/HTML Template

Tab: [Main](#) | [Billing](#) | [Communication](#) | [Tax Reporting](#) | [Custom](#) | [EFT](#) | [Spain SII Reporting](#) | [France Tax Reporting](#) | [Expenses](#)

<input checked="" type="checkbox"/>	Approval Status	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Next Approver	<input checked="" type="checkbox"/>

Approval Workflow

▲ Step 3 – Create any other fields will need in process

- Create any other fields that anticipate needing to be used within the workflow.
- In our example, we want to create a custom Approval Status Field so we can track Vendor Bills that have not yet been Submitted for Approval. Reason is native approval status field only includes
 - Pending Approval
 - Approved
 - Rejected

With only these three options available, it is possible a user has entered a bill, but is maybe not yet ready to be submitted for approval (still has some initial QC/checks before wanting to submit for approval (GL Coding is proper, validate Terms, etc.).

By adding a new approval status field we can create are own list of status/values to be linked to that field to be more granular to our process. First create a new list.

- Navigate to Customization>List, Records, & Fields>Lists>New

Custom List

Save Cancel Change ID Actions

NAME *
Vendor Bill Approval Status

ID
customlist_sn_vb_approval_status

INTERNAL ID
924

OWNER
Dean Carazza

DESCRIPTION

SHOW OPTIONS IN: THE ORDER ENTERED ALPHABETICAL ORDER
 CONVERT TO CUSTOM RECORD
 INACTIVE

ID	VALUE *	TRANSLATION	INTERNAL ID
:: val_319913_td2928790_599	Pending Submit For Approval		1
:: val_319914_td2928790_864	Pending Approval		2
:: val_319915_td2928790_723	Approved		3
:: val_319916_td2928790_732	Rejected		4

Approval Workflow

- ▲ Step 3 – Create any other fields will need in process - Continued
 - Now that we have created our list we can create our new Approval Status Field and link to our list we just created
 - Navigate to Customization>Lists, Records, & Fields>Transaction Body Fields>New

Transaction Body Field

Save | **Cancel** | **Change ID** | **Apply to Forms** | Actions

LABEL *

ID
custbody_sn_vb_approval_status

INTERNAL ID
3648

OWNER

DESCRIPTION

TYPE

LIST/RECORD

STORE VALUE USE ENCRYPTED FORMAT

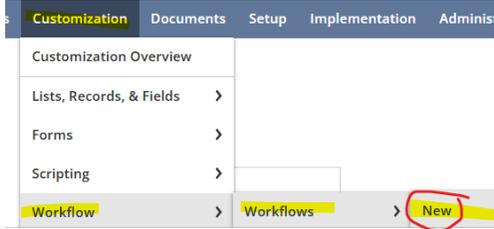
Applies To | Display | Validation & Defaulting | Sourcing & Filtering | Access | Translation | History

PURCHASE ITEM RECEIPT VIEW FROM ORDER ONLY

Approval Workflow

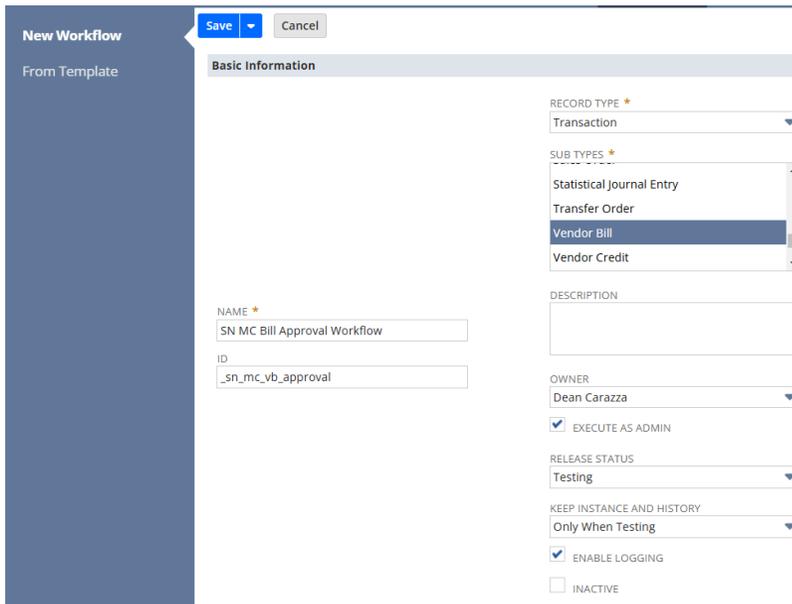
▲ Step 4 – Create New Approval Workflow

- Navigate to Customization>Workflow>Workflows>New



- Basic Information

- Note – want release status to Testing while creating and testing workflow. Once have tested and confident working, can change status to released.

A screenshot of the 'New Workflow' form. The form is titled 'New Workflow' and has a 'From Template' dropdown. The 'Basic Information' section is active. Fields include: 'RECORD TYPE' (Transaction), 'SUB TYPES' (Vendor Bill), 'NAME' (SN MC Bill Approval Workflow), 'ID' (_sn_mc_vb_approval), 'OWNER' (Dean Carazza), 'EXECUTE AS ADMIN' (checked), 'RELEASE STATUS' (Testing), 'KEEP INSTANCE AND HISTORY' (Only When Testing), 'ENABLE LOGGING' (checked), and 'INACTIVE' (unchecked).

Save Cancel

From Template

Basic Information

RECORD TYPE *
Transaction

SUB TYPES *
Statistical Journal Entry
Transfer Order
Vendor Bill
Vendor Credit

DESCRIPTION

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Testing

KEEP INSTANCE AND HISTORY
Only When Testing

ENABLE LOGGING

INACTIVE

NAME *
SN MC Bill Approval Workflow

ID
_sn_mc_vb_approval

Approval Workflow

▲ Step 4 – Create New Approval Workflow – Continued

Initiation

EVENT BASED SCHEDULED

Event Definition

ON CREATE ON VIEW OR UPDATE

USE VISUAL BUILDER CUSTOM FORMULA

- Save the Record – creates a new workflow with placeholder state 1

Workflow: SN MC Bill Approval Workflow View List More...

Workspace

+ New State

```
graph TD; START --> State1[State 1]; State1 --> END;
```

Workflow: SN MC Bill Approval Workflow

Summary Fields (0) ✎

Record Type
Transaction (Vendor Bill)

Description
-

Inactive
No

Release Status
Testing

Initiation
Event Based

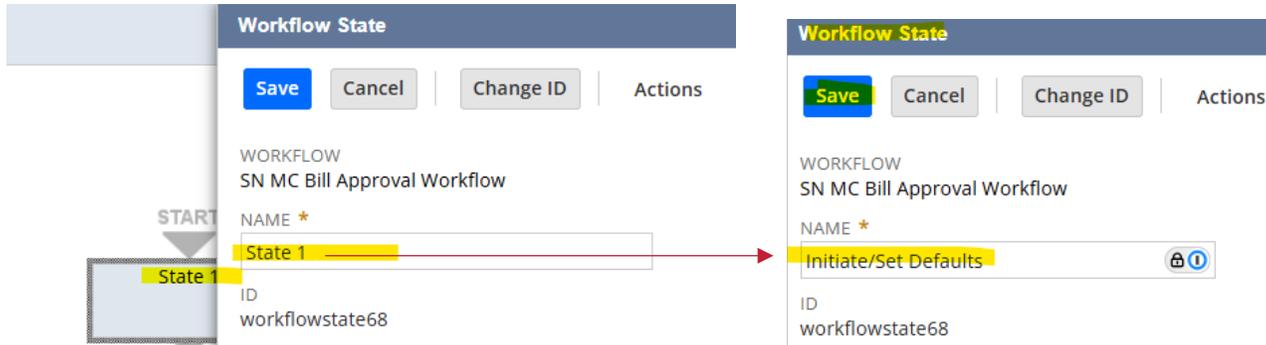
Events
On Create

Trigger Type
- All -

Approval Workflow

- ▲ Step 5 – start adding desired states/ transitions and visual mockup and place holder of process flow
 - We can start adding our placeholder states and transitions to see the visualized flow. Once feeling good about flow than we can start adding our desired actions within in each state and transition.
 - In this process envision having the following states and transitions
 - Initiate/Set Defaults
 - Pending Submit for Approval
 - Pending Approval
 - Approved
 - Rejected
 - Rejected>Reset Defaults

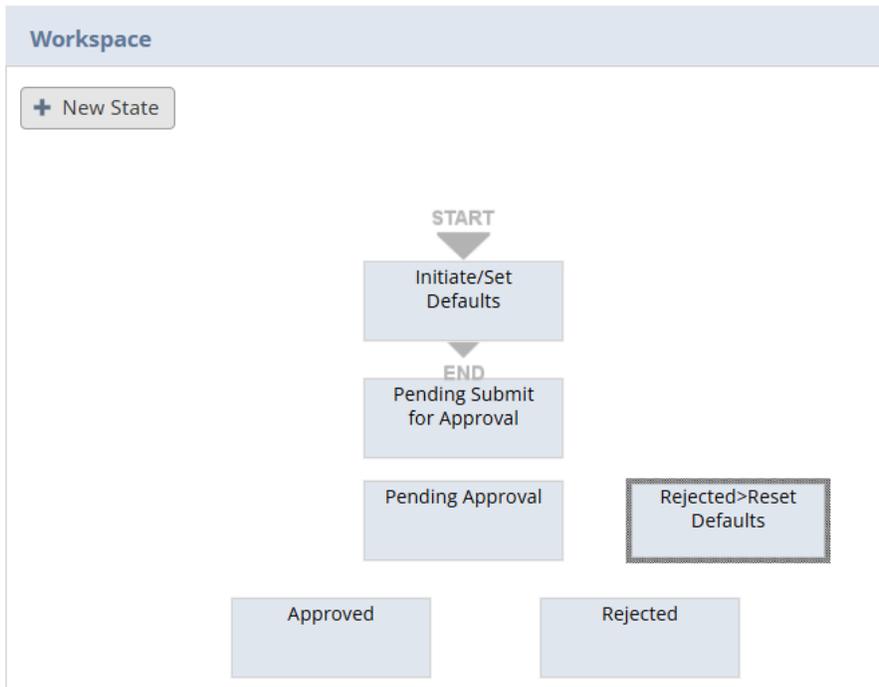
Can start out by renaming the first state by double clicking on State 1 and changing the name to Initiate/Set Defaults



Approval Workflow

- ▲ Step 5 – start adding desired states and visual mockup and place holder of process flow – Continued
 - Now that we have renamed our first state. Can continue adding the rest remaining states we want to create.
 - Click New State and add the remaining (Pending Submit For Approval, Pending Approval, Approved, Reject, Rejected>Reset Defaults)
 - By just adding our states and renaming them can start to drag/arrange and see the flow come to life

Workflow: SN MC Bill Approval Workflow



Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition

- Will start by adding actions to our first State in our workflow – Initiate/Set Defaults
 - The first time a Vendor Bill enters our workflow will be in this state, so want to reset approval status fields to pending approval and reset next approver back to empty
 - To add a State Action – make sure the workflow is in edit not view mode and double click on the state
 - › Can see the list of actions to choose from
 - We are going to use the Set Field Value Action reset fields to our desired starting values
 - › Will want updated screen shot with no lines showing on states

The screenshot shows the 'Workflow State' configuration window. The 'NAME' field is set to 'Initiate/Set Defaults' and the 'ID' is 'workflowstate68'. Below the fields are tabs for 'Actions', 'Transitions', 'Fields', and 'Translation'. The 'Actions' tab is active, showing a table with columns: ID, NAME, PARAMETERS, TRIGGER ON, EVENT TYPES, and CONTEXTS. The table is currently empty, displaying 'No records to show.' Buttons for 'Move To Top', 'Move To Bottom', 'New Action', 'New Group', and 'New Sublist Group' are visible above the table.

The 'New Action' dropdown menu is open, showing a list of available actions. The 'Set Field Value' action is highlighted in yellow.

New Action
Confirm
Create Line
Create Record
Go To Page
Go To Record
Initiate Workflow
Lock Record
NAW Check Feature Availability WS (Custom)
NAW Create Exception Record WS (Custom)
NAW Get User Preferences WS (Custom)
NAW Show Exceptions WS (Custom)
NAW delete Exception Record WS (Custom)
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
Subscribe To Record
Transform Record

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Screen shots that follow are setting the field values for Native Approval Status Field and Custom Vendor Bill Approval Status Fields back to Pending Approval and Pending Submit for Approval and setting next approver back to empty
- Native Approval Status Field

TRIGGER ON
Entry

Parameters

FIELD *
Approval Status

Value

STATIC VALUE

TEXT
[Empty text field]

CHECKED

SELECTION
Pending Approval

DATE
[Empty date field]

FROM FIELD
RECORD (JOIN FIELD)
Current Record

FIELD
[Empty field dropdown]

FORMULA
[Empty formula field]

Save Cancel

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Custom Vendor Bill Approval Status Field

Workflow Action

UNIT

▼ Parameters

FIELD *

Vendor Bill Approval Status ▼

Value

STATIC VALUE

TEXT

CHECKED

SELECTION

Pending Submit For Approval

DATE

FROM FIELD

RECORD (JOIN FIELD)

Current Record

FIELD

FORMULA

Save ▼ Cancel

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Set Next Approver back to Empty

Workflow Action

UNIT

▼ Parameters

FIELD *

Next Approver

Value

STATIC VALUE

TEXT

CHECKED

SELECTION

<Type then tab>

DATE

FROM FIELD

RECORD (JOIN FIELD)

Current Record

FIELD

FORMULA

Save Cancel

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Now that we have added our actions for this state can see what looks like summarized under the actions tab of this state

Workflow State

[Save](#) [Cancel](#) [Change ID](#) [Actions](#)

WORKFLOW
SN MC Bill Approval Workflow

NAME *

ID
workflowstate68

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

Actions • [Transitions](#) • [Fields](#) • [Translation](#)

[Move To Top](#) [Move To Bottom](#) [New Action](#) [New Group](#) [New Sublist Group](#)

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction264	Set Field Value	Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>
workflowaction265	Set Field Value	Vendor Bill Approval Status=Pending Submit For Approval	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>
workflowaction266	Set Field Value	Next Approver=null	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- It is recommended to do a test so can confirm the actions are working as expected within that state before moving on to the next states and actions. This way don't get all the way to the end and realize first state actions are not even working and where the issue is.
- To test our first state actions, will enter a bill and expectation is that
 - Native Approval Status Field set to Pending Approval
 - Custom Vendor Bill Approval Status set to Pending Submit for Approval
 - Next Approver set back to empty
 - Note make sure Workflow is in view mode not edit whenever testing the workflow
 - Navigate to Transactions>Payables>Enter Bills

Bill 🔍

Save | Cancel | Auto Fill | Recalc | Actions

Primary Information

VENDOR BILL #
To Be Generated

DATE *
11/11/2024

VENDOR *
|

SUBSIDIARY *
|

AMOUNT
|

REFERENCE NO.
|

CURRENCY *
US Dollar

EXCHANGE RATE *
1.00

ACCOUNT *
|

Classification

LOCATION *
|

PAIRED INTERCOMPANY TRANSACTION
<Type then tab>

INTERCOMPANY STATUS
|

Approval

VENDOR BILL APPROVAL STATUS
Pending Submit For Approval

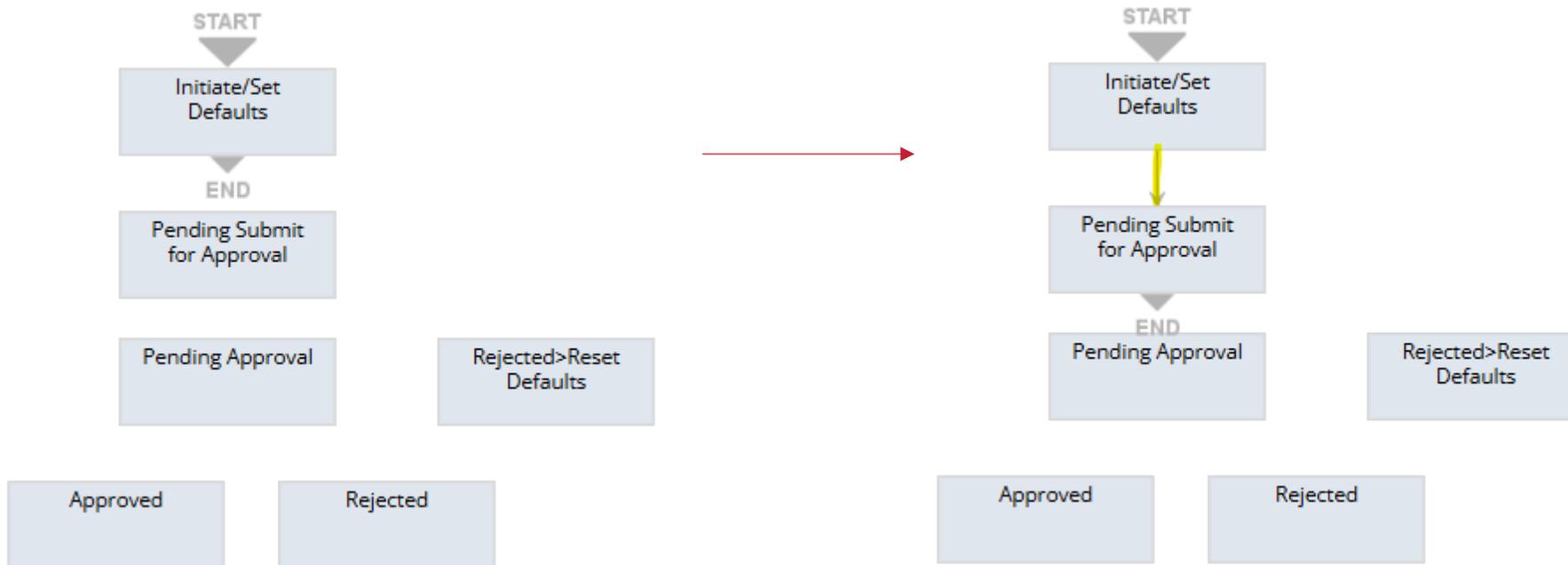
APPROVAL STATUS
Pending Approval

NEXT APPROVER
|

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Now that we have added our actions to the first state, we can draw our transition line to the next state Pending Submit for Approval
- While the workflow is in edit mode, not view, draw a line from the Initiate/Set Defaults State to the Pending Submit for Approval State



Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Now that we have finished adding our actions to our first state and testing, we can proceed to adding actions to our next state Pending Submit for Approval.
- Note we didn't need a transition trigger to go from first state to second state, but we will add transition on triggers to next transitions since will utilize the click of a buttons to be trigger on event to move us between subsequent states
- For our Pending Submit for Approval State we want to add the following actions
 - Add a Submit For Approval Button to Bill record when custom Vendor Bill Approval Status = Pending Submit for Approval
 - While the workflow is in edit not view mode, double click on the Pending Submit for Approval State
 - Click on New Action Button

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Pending Submit for Approval

ID
workflowstate69

Actions Transitions • Fields Translation •

Move To Top Move To Bottom **New Action**

ID	NAME	PARAMETERS	TRIGGER
No records to show.			

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Click the New Action Button
- Select the Add Button Action

New Action

TYPE

3Way Check Subs Match Field WS (Custom)

Add Button

- Before Record Load

Parameters

LABEL *

Submit for Approval

SAVE RECORD FIRST

CHECK CONDITION BEFORE EXECUTION

- Scroll up and click into the condition box and click the open icon to add the following condition

Workflow Action

Save Cancel

Basic Information

WORKFLOW
SN MC Bill Approval Workflow

STATE
Pending Submit for Approval

TYPE
Add Button

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

 Open

Workflow Condition

Save Cancel

USE EXPRESSIONS

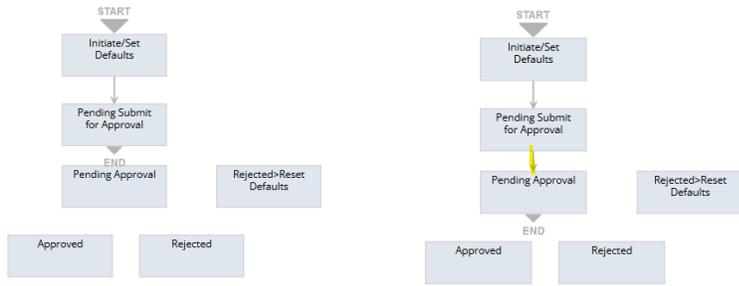
RECORD	FIELD *	COMPARE TYPE	VALUE	SELECTION
Record	Vendor Bill Approval Status	any of		Pending Submit For Approval

Add Cancel

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Next, we are going to add the Transition on Trigger to our transition line when the Submit for Approval button is clicked to take us from Pending Submit for Approval state to the Pending Approval State
- While the workflow is in edit not view mode, double click on the transition line connecting the Pending Submit for Approval State to the Pending Approval State



- Set the Execute on Button Value to – Submit for Approval

The screenshot shows the 'Workflow Transition' configuration window. At the top, there are buttons for 'Save', 'Cancel', 'Change ID', and 'Actions'. Below this, there are two main sections: 'Basic Information' and 'Condition'.
In the 'Basic Information' section:
- WORKFLOW: SN MC Bill Approval Workflow
- ID: workflowtransition247
- FROM: Pending Submit for Approval
- TO: Pending Approval
- INSERT BEFORE: - Unchanged -
- TRANSITION ON: (empty dropdown)
- EVENT TYPES: (empty text area)
In the 'Condition' section:
- USE: VISUAL BUILDER (selected), CUSTOM FORMULA
- CONDITION: (empty text area)
- SAVED SEARCH CONDITION: (empty dropdown)
- WAIT FOR WORKFLOW: (empty dropdown)
- WAIT FOR WORKFLOW STATE: (empty dropdown)
- EXECUTE ON BUTTON: Submit for Approval (selected)

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - We are done adding our add button and transition on to our Pending Submit for Approval State, so we can do a quick test to make sure actions are working as expected for this state
 - Test for this state and expectations would be that if enter a vendor bill upon save should see the Submit for Approval Button
 - Make sure workflow is in view not edit mode before testing



Test Vendor Bill #1 Staples - US West

PENDING APPROVAL

[Edit](#) [Back](#) | [Cancel Bill](#) [Submit for Approval](#) | Actions

▼ Primary Information	
VENDOR BILL # 436	AMOUNT 4,500.00
DATE 11/11/2024	REFERENCE NO. Test Vendor Bill #1
VENDOR Staples - US West	CURRENCY US Dollar
SUBSIDIARY US West	EXCHANGE RATE 1.00

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Now that we have successfully tested our action for the Pending Submit for Approval State, we can proceed to adding our action and transition on trigger to the Pending Approval State
 - We want to add the following Actions to the Pending Approval State
 - Set Field Value – to Pending Approval when enters this state
 - Set Field Value – Next Approver – based on $\leq \$10,000$ condition – Dean Carazza
 - Set Field Value – Next Approver – Based on $> \$10,000$ condition – Carol Morgan
 - Add Button – Approve Button – Based on condition Next Approver is current user
 - Add Button – Reject Button – Based on condition Next Approver is current user
 - Lock Record – Based on condition that user is not the Next Approver
 - What follows is the steps/screen shots to add each of the actions above

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Set Field Value – to Pending Approval when enters this state
 - While the workflow is in edit not view mode, double click on the Pending Approval State
 - Click on the New Action Button

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Pending Approval

ID
workflowstate70

Actions Transitions Fields Translation

Move To Top Move To Bottom **New Action** New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS
No records to show.					

- Trigger on Entry
- Select the Set Field Value Action and input the following and hit Save

Parameters

FIELD *
Vendor Bill Approval Status

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
Pending Approval

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition – Continued
 - Set Field Value – Next Approver – based on $\leq \$10,000$ condition – Dean Carazza
 - Click to add a new Action

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

DESCRIPTION

NAME *
Pending Approval

ID
workflowstate70

DO NOT EXIT *
START STATE

Actions Transitions Fields Translation

Move To Top Move To Bottom New Action New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CO
workflaction268	Set Field Value	Vendor Bill Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39	

- Set Field Value

Parameters

FIELD *
Next Approver

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
Dean Carazza

- Condition

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

Workflow Condition

Save Cancel

USE EXPRESSIONS

RECORD	FIELD	COMPARE TYPE	VALUE
	Total	less than or equal	10000.00

Add Cancel Insert Remove

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Set Field Value – Next Approver – Based on >\$10,000 condition – Carol Morgan
- Click to add a new Action

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Pending Approval

ID
workflowstate70

DESCRIPTION

DO NOT EXIT WORKFLC
 START STATE

Actions • Transitions • Fields • Translation •

Move To Top Move To Bottom **New Action** New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION
workflowaction268	Set Field Value	Vendor Bill Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39	
workflowaction269	Set Field Value	Next Approver=Dean Carazza	Entry	Selected All	Selected 37 of 39	Total <= 10000.00

- Set Field Value

Parameters

FIELD *
Next Approver

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
Carol Morgan

- Condition

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

Workflow Condition

Save Cancel

USE EXPRESSIONS

RECORD	FIELD *	COMPARE TYPE	VALUE	SELECTION
	Total	greater than	10000.00	<Type & tab for single value>

Add Cancel Insert Remove

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Add Button – Approve Button – Based on condition Next Approver is current user
- Click to add a new Action

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Pending Approval

ID
workflowstate70

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

Actions • Transitions • Fields • Translation •

Move To Top Move To Bottom **New Action** New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION
workflowaction268	Set Field Value	Vendor Bill Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39	
workflowaction269	Set Field Value	Next Approver=Dean Carazza	Entry	Selected All	Selected 37 of 39	Total <= 10000.00
workflowaction270	Set Field Value	Next Approver=Carol Morgan	Entry	Selected All	Selected 37 of 39	Total > 10000.00

- Add Button
- Trigger Before Record Load

Parameters

LABEL *
Approve

SAVE RECORD FIRST
 CHECK CONDITION BEFORE EXECUTION

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

Workflow Condition

Save Cancel

USE EXPRESSIONS

RECORD	FIELD *	COMPARE TYPE	VALUE	SELECTION	RECORD	VALUE FIELD
	User	any of				Next Approver

▼ Add ✕ Cancel + Insert 🗑 Remove

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Add Button – Reject Button – Based on condition Next Approver is current user
- Click to add a new Action

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Pending Approval

ID
workflowstate70

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions • Transitions • Fields • Translation •

Move To Top Move To Bottom **New Action** New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION
workflowaction268	Set Field Value	Vendor Bill Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39	
workflowaction269	Set Field Value	Next Approver=Dean Carazza	Entry	Selected All	Selected 37 of 39	Total <= 10000.00
workflowaction270	Set Field Value	Next Approver=Carol Morgan	Entry	Selected All	Selected 37 of 39	Total > 10000.00
workflowaction271	Add Button	Label: Approve. Save record first	Before Record Load	Selected All	Selected 37 of 39	User = Next Approver

- Add Button
- Trigger Before Record Load

Parameters

LABEL *
Reject

SAVE RECORD FIRST

CHECK CONDITION BEFORE EXECUTION

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

Workflow Condition

Save Cancel

USE EXPRESSIONS

RECORD	FIELD *	COMPARE TYPE	VALUE	SELECTION	RECORD	VALUE FIELD
	User	any of				Next Approver

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Lock Record – Based on condition that user is not the Next Approver
- Click to add a new Action

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Pending Approval

ID
workflowstate70

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions Transitions Fields Translation

Move To Top Move To Bottom New Action New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION
workflowaction268	Set Field Value	Vendor Bill Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39	
workflowaction269	Set Field Value	Next Approver=Dean Carazza	Entry	Selected All	Selected 37 of 39	Total <= 10000.00
workflowaction270	Set Field Value	Next Approver=Carol Morgan	Entry	Selected All	Selected 37 of 39	Total > 10000.00
workflowaction271	Add Button	Label: Approve. Save record first	Before Record Load	Selected All	Selected 37 of 39	User = Next Approver
workflowaction272	Add Button	Label: Reject. Save record first	Before Record Load	Selected All	Selected 37 of 39	User = Next Approver

- Lock Record
- Trigger on Before Record Load
- Condition

Condition

USE VISUAL-BUILDER CUSTOM FORMULA

CONDITION

Workflow Condition

Save Cancel Actions

USE EXPRESSIONS

RECORD	FIELD *	COMPARE TYPE	VALUE	SELECTION	RECORD	VALUE FIELD
	User	none of				Next Approver

OK Cancel Insert Remove

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Now that have finished adding all actions for the Pending Approval State, can see them summarized below

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Pending Approval

ID
workflowstate70

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions • Transitions • Fields • Translation •

Move To Top Move To Bottom New Action New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction268	Set Field Value	Vendor Bill Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39							✓
workflowaction269	Set Field Value	Next Approver=Dean Carazza	Entry	Selected All	Selected 37 of 39	Total <= 10000.00						✓
workflowaction270	Set Field Value	Next Approver=Carol Morgan	Entry	Selected All	Selected 37 of 39	Total > 10000.00						✓
workflowaction271	Add Button	Label: Approve, Save record first	Before Record Load	Selected All	Selected 37 of 39	User = Next Approver						✓
workflowaction272	Add Button	Label: Reject, Save record first	Before Record Load	Selected All	Selected 37 of 39	User = Next Approver						✓
workflowaction273	Lock Record		Before Record Load	Selected All	Selected 37 of 39	User != Next Approver						✓

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Now that we have added all our actions for the Pending Approval State, we can test to ensure the actions are working as expected
- We can perform the following test with expected results. Enter a Vendor Bill and upon hitting submit for approval should see that has transitioned to Pending Approval and that the Next Approver is properly being set to the correct approver based on Total \$ value of the bill
- Make sure Workflow is in view mode not edit before testing
- Before Submit for Approval Button Clicked

The screenshot shows a 'Bill' form in 'View' mode. The title is 'Test Pending Approval State Actions Staples - US West' and the status is 'PENDING APPROVAL'. The 'Actions' bar includes 'Edit', 'Back', 'Cancel Bill', 'Submit for Approval', and 'Actions'. The form is divided into three sections: 'Primary Information', 'Classification', and 'Approval'. In the 'Approval' section, the 'VENDOR BILL APPROVAL STATUS' is 'Pending Submit For Approval' and the 'NEXT APPROVER' is 'John Carlson'.

Primary Information	
VENDOR BILL #	AMOUNT
454	9,999.00
DATE	REFERENCE NO.
11/13/2024	Test Pending Approval State Actions
VENDOR	CURRENCY
Staples - US West	US Dollar
SUBSIDIARY	EXCHANGE RATE
US West	1.00

Classification	
LOCATION	INTERCOMPANY STATUS
US West	
PAIRED INTERCOMPANY TRANSACTION	

Approval	
VENDOR BILL APPROVAL STATUS	NEXT APPROVER
Pending Submit For Approval	John Carlson
APPROVAL STATUS	
Pending Approval	

- After Submit for Approval Button Clicked

The screenshot shows the same 'Bill' form in 'View' mode after clicking 'Submit for Approval'. The 'VENDOR BILL APPROVAL STATUS' is now 'Pending Approval' and the 'NEXT APPROVER' is 'John Carlson'.

Primary Information	
VENDOR BILL #	AMOUNT
454	9,999.00
DATE	REFERENCE NO.
11/13/2024	Test Pending Approval State Actions
VENDOR	CURRENCY
Staples - US West	US Dollar
SUBSIDIARY	EXCHANGE RATE
US West	1.00

Classification	
LOCATION	INTERCOMPANY STATUS
US West	
PAIRED INTERCOMPANY TRANSACTION	

Approval	
VENDOR BILL APPROVAL STATUS	NEXT APPROVER
Pending Approval	John Carlson
APPROVAL STATUS	
Pending Approval	

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Now that we have successfully tested our action for the Pending Approval State, we can proceed to adding our action and transition on trigger to the Approved State
- First we want to update the Transition Line to the Transition On Trigger so when approved button is clicked will transition from Pending Approval State to Approved State
 - Double click on the Transition line between Pending Approval and Approve States



The screenshot shows the 'Workflow Transition' configuration interface. It includes a 'Basic Information' tab with fields for 'WORKFLOW' (SN MC Bill Approval Workflow), 'ID' (workflowtransition248), 'FROM' (Pending Approval), and 'TO' (Approved). The 'Condition' tab is active, showing 'USE' set to 'VISUAL BUILDER'. The 'EXECUTE ON BUTTON' dropdown is set to 'Approve'.

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Now we can add our actions needed to the Approved State. We want to add the following:
 - Set Field Value – Native Approval Status to Approved when enters this state
 - Set Field Value – Custom Vendor Bill Approval Status to Approved when enters this state
 - Lock Record – For users that are not administrators. Don't want people to be able to edit/change an approved bill with exception of admins.
 - Check the Do not Exit Workflow Checkbox on the Approved State. This because we need the workflow to never end/always be running when reaches final approved state so it can keep the record locked. If workflow exits it won't stay active/running and has to be active/running to keep the record locked while in approved state.
 - What follows is the steps/screen shots to add each of the actions above

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Set Field Value – Native Approval Status to Approved when enters this state
 - While the workflow is in edit not view mode, double click on the Approval State
 - Click the New Action

- Trigger On Entry
- Set Field Value

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Set Field Value – Custom Vendor Bill Approval Status to Approved when enters this state
 - Click the New Action

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Approved

ID
workflowstate71

DESCRIP

DO I

STAF

Actions • Transitions Fields Translation •

Move To Top Move To Bottom **New Action** New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS
workflowaction274	Set Field Value	Approval Status=Approved	Entry	Selected All	Selected 37 of 39

- Trigger On Entry
- Set Field Value

Parameters

FIELD *
Vendor Bill Approval Status

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
Approved

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Lock Record – For users that are not administrators. Don't want people to be able to edit/change an approved bill with exception of admins.
- Click the New Action

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS
workflowaction274	Set Field Value	Approval Status=Approved	Entry	Selected All	Selected 37 of 39
workflowaction275	Set Field Value	Vendor Bill Approval Status=Approved	Entry	Selected All	Selected 37 of 39

- Lock Record
- Trigger On Before Record Load
- Condition

Basic Information

WORKFLOW
SN MC Bill Approval Workflow

STATE
Approved

TYPE
Lock Record

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

Open

Workflow Condition

Save Cancel

USE EXPRESSIONS

RECORD	FIELD *	COMPARE TYPE	VALUE	SELECTION
	User Role	none of		Administrator

Add Cancel Insert Remove

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Check the Do not Exit Workflow Checkbox on the Approved State. This because we need the workflow to never end/always be running when reaches final approved state so it can keep the record locked. If workflow exists it won't stay active/running and has to be active/running to keep the record locked while in approved state.

Workflow State

Save | **Cancel** | **Change ID** | **Actions**

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Approved

ID
workflowstate71

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions • | **Transitions** | **Fields** | **Translation •**

Move To Top | **Move To Bottom** | **New Action** | **New Group** | **New Sublist Group**

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction274	Set Field Value	Approval Status=Approved	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>
workflowaction275	Set Field Value	Vendor Bill Approval Status=Approved	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>
workflowaction276	Lock Record		Before Record Load	Selected All	Selected 37 of 39	User Role != Administrator						<input checked="" type="checkbox"/>

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Now that we have added all our actions for the Approval State, we can test to ensure the actions are working as expected
- We can perform the following test with expected results.
 - Enter Vendor Bill
 - Hit Submit for Approval
 - › Native Workflow Status should be Pending Approval
 - › Custom Vendor Bill Approval Status should be Pending Approval
 - › Next Approver should be assigned based on Total \$ value condition
 - › Approve and Reject buttons should now be showing – note only the Approve Button is functional since we have not added transition and actions to reject state yet
 - If click Approval Button
 - › Native Approval Status should be Approved
 - › Custom Vendor Bill Status should be approved
 - › Record should be locked if viewing in non admin role
 - ***Note, make sure workflow is in view mode, not edit before testing***

The image shows two side-by-side screenshots of a vendor bill interface, illustrating the transition from a pending approval state to an open state.

Left Screenshot (PENDING APPROVAL):

- Header: Bill [Search Icon]
- Page Title: Test Approval State Actions Staples - US West
- Tab: PENDING APPROVAL
- Buttons: Edit, Back, Cancel Bill, Approve, Reject, Print, Refresh, Actions
- Primary Information:
 - VENDOR BILL #: 455
 - AMOUNT: 9,999.00
 - DATE: 11/13/2024
 - REFERENCE NO.: Test Approval State Actions
 - VENDOR: Staples - US West
 - CURRENCY: US Dollar
 - SUBSIDIARY: US West
 - EXCHANGE RATE: 1.00
- Classification:
 - LOCATION: US West
 - PAIRED INTERCOMPANY TRANSACTION: [Empty]
 - INTERCOMPANY STATUS: [Empty]
- Approval:
 - VENDOR BILL APPROVAL STATUS: Pending Approval
 - APPROVAL STATUS: Pending Approval
 - NEXT APPROVER: Dean Carazza

Right Screenshot (OPEN):

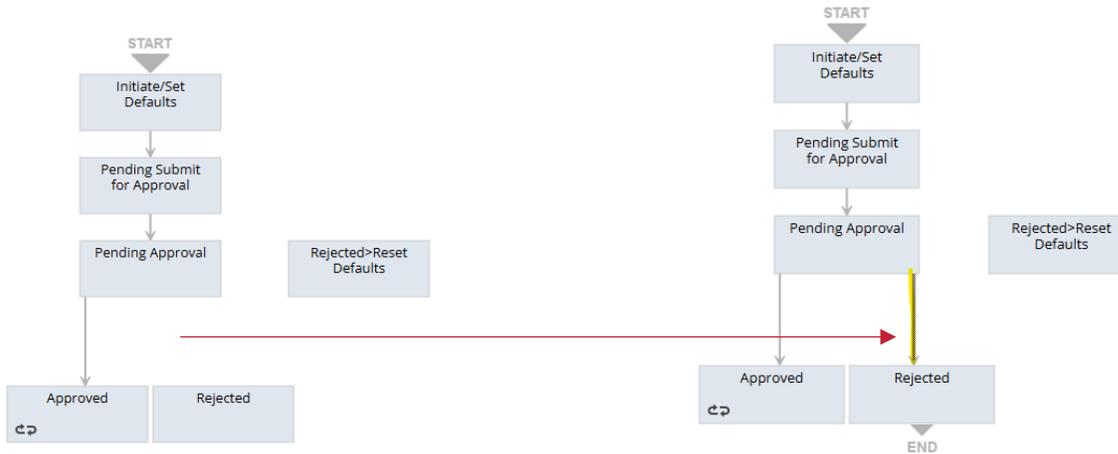
- Header: Bill [Search Icon]
- Page Title: Test Approval State Actions Staples - US West
- Tab: OPEN
- Buttons: Edit, Back, Credit, Authorize Return, Make Payment, Print, Refresh, Actions
- Primary Information:
 - VENDOR BILL #: 455
 - AMOUNT: 9,999.00
 - DATE: 11/13/2024
 - REFERENCE NO.: Test Approval State Actions
 - VENDOR: Staples - US West
 - CURRENCY: US Dollar
 - SUBSIDIARY: US West
 - EXCHANGE RATE: 1.00
- Classification:
 - LOCATION: US West
 - PAIRED INTERCOMPANY TRANSACTION: [Empty]
 - INTERCOMPANY STATUS: [Empty]
- Approval:
 - VENDOR BILL APPROVAL STATUS: Approved
 - APPROVAL STATUS: Approved
 - NEXT APPROVER: Dean Carazza

A red arrow points from the 'Approve' button in the left screenshot to the 'OPEN' tab in the right screenshot, indicating the result of the action.

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Now that we have successfully tested our actions for the Approval State, we can proceed to adding our actions and transition on trigger to the Rejected State
- We want to draw a line from the Pending Approval State to the Rejected State



- While the workflow is in edit mode, not view mode, double click on the line to add Transition on Click of Reject Button. This is so when Reject Button is clicked on Vendor bill will transition from the Pending Approval State to the Rejected State.

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Now that we have added our transition from Pending Approval State to Rejected State, we can add our Rejection State Actions which are the following
 - Set Field Value – Native Approval Status to Rejected when enters this state
 - Set Field Value – Custom Vendor Bill Approval Status to Rejected when enters this state
 - Add Button – Resubmit for Approval which will take us to another reset default states before transitioning back to Pending Approval State so can pick back up Vendor Bill Approval Process in the Pending Approval State
- What follows is the steps/screen shots to add each of the actions above

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Set Field Value – Native Approval Status to Rejected when enters this state
- While the workflow is in edit not view mode, double click on the Rejected State
- Click the New Action

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Rejected

ID
workflowstate72

Actions Transitions Fields Translation •

Move To Top Move To Bottom **New Action**

ID	NAME	PARAMETERS	TRIGGER
No records to show.			

- Trigger on Entry
- Set Field Value

Parameters

FIELD *
Approval Status

Value

STATIC VALUE

TEXT
[]

CHECKED

SELECTION
Rejected

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Add Button – Resubmit for Approval which will take us to another reset default states before transitioning back to Pending Approval State so can pick back up Vendor Bill Approval Process in the Pending Approval State
- Click the New Action

Workflow State

[Save](#) [Cancel](#) [Change ID](#) [Actions](#)

WORKFLOW
SN MC Bill Approval Workflow

DESCRIPTION

NAME *
Rejected

ID
workflowstate72

DO NOT B
 START STA

Actions • [Transitions](#) [Fields](#) [Translation](#) •

[Move To Top](#) [Move To Bottom](#) [New Action](#) [New Group](#) [New Sublist Group](#)

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS
workflowaction277	Set Field Value	Approval Status=Rejected	Entry	Selected All	Selected 37 of 39
workflowaction278	Set Field Value	Vendor Bill Approval Status=Rejected	Entry	Selected All	Selected 37 of 39

- Trigger on Before Record Load
- Add Button

Parameters

LABEL *
Resubmit for Approval

SAVE RECORD FIRST
 CHECK CONDITION BEFORE EXECUTION

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Now that we have finished adding our actions to reject state can see them summarized below

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Rejected

ID
workflowstate72

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions • Transitions Fields Translation •

Move To Top Move To Bottom New Action New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction277	Set Field Value	Approval Status=Rejected	Entry	Selected All	Selected 37 of 39							✓
workflowaction278	Set Field Value	Vendor Bill Approval Status=Rejected	Entry	Selected All	Selected 37 of 39							✓
workflowaction279	Add Button	Label: Resubmit for Approval	Before Record Load	Selected All	Selected 37 of 39							✓

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Now that we have finished adding our Rejected State actions we can do a test to confirm is working as expected.
- We can perform the following test with expected results.
 - Enter Vendor Bill
 - Hit Submit for Approval
 - > Native Workflow Status should be Pending Approval
 - > Custom Vendor Bill Approval Status should be Pending Approval
 - > Next Approver should be assigned based on Total \$ value condition
 - > Approve and Reject buttons should now be showing
 - If click Reject Button
 - > Native Approval Status should be Rejected
 - > Custom Vendor Bill Status should be Rejected
 - ***Note, make sure Workflow is in View, not Edit mode before testing***

Bill Test Rejected State Actions Staples - US West PENDING APPROVAL

Edit Back Cancel Bill Approve Reject Print Refresh Actions

Primary Information

VENDOR BILL #	AMOUNT
456	9,999.00
DATE	REFERENCE NO.
11/13/2024	Test Rejected State Action:
VENDOR	CURRENCY
Staples - US West	US Dollar
SUBSIDIARY	EXCHANGE RATE
US West	1.00

Classification

LOCATION	INTERCOMPANY STATUS
US West	
PAIRED INTERCOMPANY TRANSACTION	

Approval

VENDOR BILL APPROVAL STATUS	NEXT APPROVER
Pending Approval	Dean Carazza
APPROVAL STATUS	
Pending Approval	

Bill Test Rejected State Actions Staples - US West REJECTED

Edit Back Print Refresh Actions

Primary Information

VENDOR BILL #	AMOUNT
456	9,999.00
DATE	REFERENCE NO.
11/13/2024	Test Rejected State Actions
VENDOR	CURRENCY
Staples - US West	US Dollar
SUBSIDIARY	EXCHANGE RATE
US West	1.00

Classification

LOCATION	INTERCOMPANY STATUS
US West	
PAIRED INTERCOMPANY TRANSACTION	

Approval

VENDOR BILL APPROVAL STATUS	NEXT APPROVER
Rejected	Dean Carazza
APPROVAL STATUS	
Rejected	

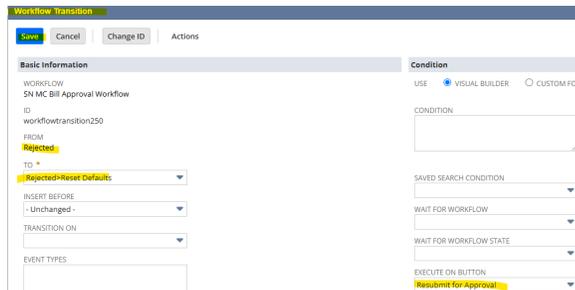
Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Now that we have finished testing our rejected action state, we can add our transition on trigger from Rejected State to the Rejected>Reset Defaults State. The purpose of this state is so when user is ready to resubmit for approval, we have a reset default state so can change the approval statuses back from rejected to Pending Approval and Pending Submit for Approval and reset the next approver to blank so workflow can restart at the pending for approval state.
- Make sure the workflow is in edit, not view mode
- We want to draw a line from the Rejected State to the Rejected>Reset Defaults State



- Double click on the line just added to set the transition Execute on Button – Resubmit for Approval



Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Now we are down to our last state the Rejected>Reset Defaults State. We can add our actions and final transition to complete the workflow
- We want to add the following actions to the Rejected>Reset Defaults State
- Set Field Value – Native Approval Status back to Pending Approval
- Set Field Value – Custom Vendor Bill Approval Status back to Pending Submit for Approval
- Set Field Value – Next Approver back to blank/empty

- What follows is the steps/screen shots to add each of the actions above

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition – Continued

- Set Field Value – Native Approval Status back to Pending Approval
- While the workflow is in edit not view mode, double click on the Rejected>Reset Defaults State
- Click the New Action

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Rejected>Reset Defaults

ID
workflowstate73

Actions Transitions Fields Translation •

Move To Top Move To Bottom **New Action**

ID	NAME	PARAMETERS	TRIGGER
No records to show.			

- Trigger on Entry
- Set Field Value

Parameters

FIELD *
Approval Status

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
Pending Approval

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Set Field Value – Custom Vendor Bill Approval Status back to Pending Submit for Approval
- Click the New Action

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Rejected>Reset Defaults

ID
workflowstate73

DESCRIP

DO I
 STAF

Actions • Transitions Fields Translation •

Move To Top Move To Bottom **New Action** New Group New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS
workflowaction280	Set Field Value	Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39

- Trigger On Entry
- Set Field Value

Parameters

FIELD *
Vendor Bill Approval Status

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
Pending Submit For Approval

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Set Field Value – Custom Vendor Bill Approval Status back to Pending Submit for Approval
 - Click the New Action

Workflow State

[Save](#) [Cancel](#) [Change ID](#) [Actions](#)

WORKFLOW
SN MC Bill Approval Workflow

NAME *
Rejected>Reset Defaults

ID
workflowstate73

DESCRIPTION

DO NOT EXIT V

START STATE

Actions • Transitions Fields Translation •

[Move To Top](#) [Move To Bottom](#) [New Action](#) [New Group](#) [New Sublist Group](#)

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CC
workflowaction280	Set Field Value	Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39	
workflowaction281	Set Field Value	Vendor Bill Approval Status=Pending Submit For Approval	Entry	Selected All	Selected 37 of 39	

- Trigger on Entry
- Set Field Value

Parameters

FIELD *
Next Approver

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
<Type then tab>

Approval Workflow

- ▲ Step 6 – Adding Actions and conditions to each state and transition - Continued
 - Can see what summarized version of the actions we have added to the Rejected>Reset Defaults state look like

Workflow State

[Save](#) [Cancel](#) [Change ID](#) | [Actions](#)

WORKFLOW
SN MC Bill Approval Workflow

NAME *

ID
workflowstate73

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

Actions • [Transitions](#) [Fields](#) [Translation •](#)

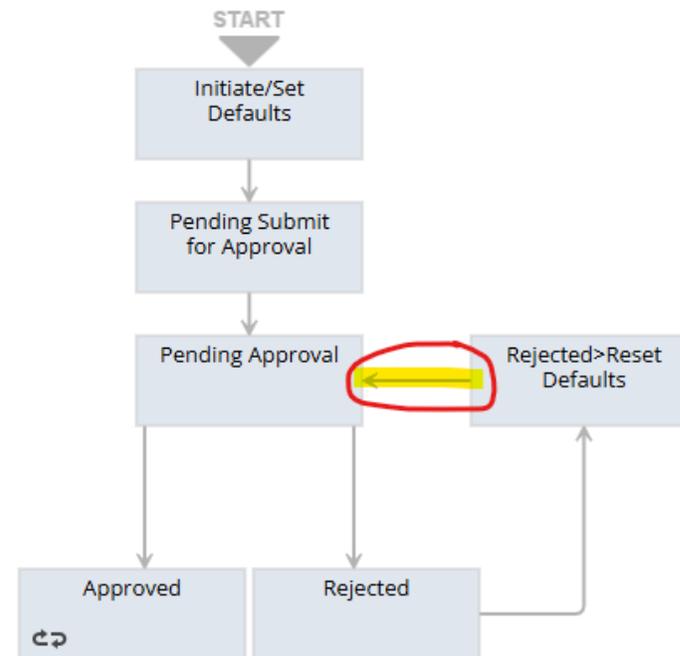
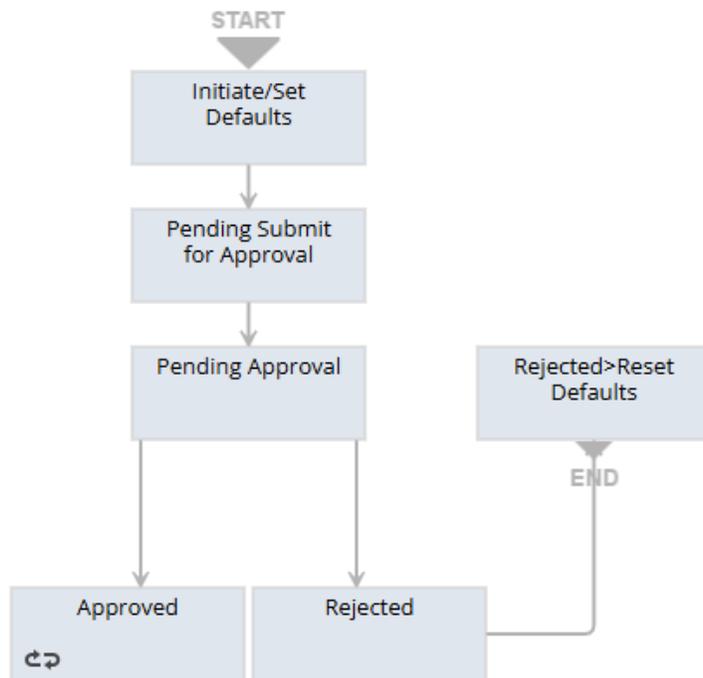
[Move To Top](#) [Move To Bottom](#) [New Action](#) [New Group](#) [New Sublist Group](#)

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
⋮ workflowaction280	Set Field Value	Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39							✓
⋮ workflowaction281	Set Field Value	Vendor Bill Approval Status=Pending Submit For Approval	Entry	Selected All	Selected 37 of 39							✓
⋮ workflowaction282	Set Field Value	Next Approver=null	Entry	Selected All	Selected 37 of 39							✓

Approval Workflow

▲ Step 6 – Adding Actions and conditions to each state and transition - Continued

- Last step for us to complete our workflow is to add the transition from the Rejected>Reset Defaults State back to the Pending Approval State. Note, don't need any transition trigger as we are okay to proceed right to the Pending Approval State after we have reset the fields in the Rejected>Reset Defaults state. Example, we don't need to wait for the click of a button from the user to move us to the next state.
- While work flow is in edit, not view mode
- Draw Line from the Rejected>Reset Defaults State to the Pending Approval State



Approval Workflow

▲ Step 7 – Testing the Workflow

- Now that we have successfully finished completing our workflow (Added our actions and transitions for every state in the workflow) we will proceed with doing end to end testing to see if we missed anything and if the workflow is working as expected
- Put the Workflow into View not edit mode before testing
- For this test we will test the following
 1. Enter a Vendor Bill for \$12,000 to Supplies Expense
 - › Submit the Bill for Approval
 - Native Approval Status should become Pending Approval
 - Custom Vendor Bill Approval Status should become Pending Approval
 - Next Approver should become Carol Morgan as she approves bills over \$10,000 USD
 2. Reject the Bill and leave a comment that bill should be entered to Computer Office Expense
 - Native Approval Status should become Rejected
 - Custom Vendor Bill Approval Status should become Rejected
 - Resubmit for Approval button should be showing
 3. Edit the Bill and change to the correct GL account and Resubmit for Approval
 - Native Approval Status should change back to Pending Approval
 - Custom Vendor Bill Approval Status should change back to Pending Approval
 4. Approve the Bill
 - › Native Approval Status should become Approved
 - › Custom Vendor Bill Approval Status should become Approved
 - › Vendor Bill should be locked in all roles except administrator
- **Make sure workflow is in view, not edit mode before testing**
- What follows is the testing steps of each above

Approval Workflow

▲ Step 7 – Testing the Workflow - Continued

1. Enter a Vendor Bill for \$12,000 to Supplies Expense

› Submit the Bill for Approval

‣ Native Approval Status should become Pending Approval

‣ Custom Vendor Bill Approval Status should become Pending Approval

‣ Next Approver should become Carol Morgan as she approves bills over \$10,000 USD

Bill Testing Workflow Staples - US West PENDING APPROVAL

Buttons: Edit, Back, Cancel Bill, Submit for Approval, Actions

Primary Information

VENDOR BILL #	457	AMOUNT	12,000.00
DATE	11/13/2024	REFERENCE NO.	Testing Workflow
VENDOR	Staples - US West	CURRENCY	US Dollar
SUBSIDIARY	US West	EXCHANGE RATE	1.00

Classification

LOCATION: US West
PAIRED INTERCOMPANY TRANSACTION: [] INTERCOMPANY STATUS: []

Approval

VENDOR BILL APPROVAL STATUS	Pending Submit For Approval	NEXT APPROVER	[]
APPROVAL STATUS	Pending Approval		

Approval Information

REJECT REASON: []
DIST. RELATED JOURNAL: []

Expenses and Items | Billing | Relationships | Communication | Related Records | System Information | EET | France Tax R

Expense 12,000.00 • Items 0.00

CATEGORY	ACCOUNT	AMOUNT	CUSTOMER:PROJECT	BILLABLE	DEPARTMENT	CLASS	LOCATION
	6240 Expenses : G&A Expenses : Supplies Expense	12,000.00					US

Bill Testing Workflow Staples - US West PENDING APPROVAL

Buttons: Cancel Bill, Actions

Primary Information

VENDOR BILL #	457	AMOUNT	12,000.00
DATE	11/13/2024	REFERENCE NO.	Testing Workflow
VENDOR	Staples - US West	CURRENCY	US Dollar
SUBSIDIARY	US West	EXCHANGE RATE	1.00

Classification

LOCATION: US West
PAIRED INTERCOMPANY TRANSACTION: [] INTERCOMPANY STATUS: []

Approval

VENDOR BILL APPROVAL STATUS	Pending Approval	NEXT APPROVER	Carol Morgan
APPROVAL STATUS	Pending Approval		

Approval Information

REJECT REASON: []
DIST. RELATED JOURNAL: []

Expenses and Items | Billing | Relationships | Communication | Related Records | System Information | EET | France Tax R

Expense 12,000.00 • Items 0.00

CATEGORY	ACCOUNT	AMOUNT	CUSTOMER:PROJECT	BILLABLE	DEPARTMENT	CLASS	LOCATION
	6240 Expenses : G&A Expenses : Supplies Expense	12,000.00					US West

Approval Workflow

▲ Step 7 – Testing the Workflow - Continued

2. Reject the Bill and leave a comment that bill should be entered to Computer Equipment Office Expense not Supplies expense

- ▶ Native Approval Status should become Rejected
- ▶ Custom Vendor Bill Approval Status should become Rejected
- ▶ Resubmit for Approval button should be showing

The screenshot shows a NetSuite Bill interface for 'Testing Workflow Staples - US West' with a 'PENDING APPROVAL' status. The interface includes a navigation bar with 'Edit', 'Back', 'Cancel Bill', 'Approve', 'Reject', and 'Actions' buttons. The main content is divided into three sections: 'Primary Information', 'Classification', and 'Approval'. The 'Approval' section shows 'VENDOR BILL APPROVAL STATUS' as 'Pending Approval' and 'NEXT APPROVER' as 'Carol Morgan'. A red arrow points from the 'Reject' button to the right-hand screenshot.

Primary Information		
VENDOR BILL #	AMOUNT	ACCOUNT
457	12,000.00	2010 Accounts Payable : Accounts Payable - Trade
DATE	REFERENCE NO.	POSTING PERIOD
11/13/2024	Testing Workflow	Nov 2024
VENDOR	CURRENCY	DUE DATE
Staples - US West	US Dollar	12/13/2024
SUBSIDIARY	EXCHANGE RATE	MEMO
US West	1.00	

Classification	
LOCATION	INTERCOMPANY STATUS
US West	
PAIRED INTERCOMPANY TRANSACTION	

Approval		
VENDOR BILL APPROVAL STATUS	NEXT APPROVER	APPROVE/REJECT NOTES
Pending Approval	Carol Morgan	
APPROVAL STATUS		11/13/24 CM-- Please correct GL Coding of Bill below to 6655 Computer Office Expense
Pending Approval		

The screenshot shows the same NetSuite Bill interface after the bill has been rejected. The status is now 'REJECTED' and the 'Resubmit for Approval' button is highlighted in yellow. The 'Approval' section shows 'VENDOR BILL APPROVAL STATUS' as 'Rejected' and 'APPROVAL STATUS' as 'Rejected'. The 'APPROVE/REJECT NOTES' field contains the comment: '11/13/24 CM-- Please correct GL Coding of Bill below to 6655 Computer Office Expense'.

Primary Information		
VENDOR BILL #	AMOUNT	
457	12,000.00	
DATE	REFERENCE NO.	
11/13/2024	Testing Workflow	
VENDOR	CURRENCY	
Staples - US West	US Dollar	
SUBSIDIARY	EXCHANGE RATE	
US West	1.00	

Classification	
LOCATION	INTERCOMPANY STATUS
US West	
PAIRED INTERCOMPANY TRANSACTION	

Approval		
VENDOR BILL APPROVAL STATUS	NEXT APPROVER	
Rejected	Carol Morgan	
APPROVAL STATUS		
Rejected		

Approval Workflow

▲ Step 7 – Testing the Workflow - Continued

3. Edit the Bill and change to the correct GL account and Resubmit for Approval

- ▶ Native Approval Status should change back to Pending Approval
- ▶ Custom Vendor Bill Approval Status should change back to Pending Approval

Bill Testing Workflow Staples - US West **REJECTED**

Primary Information

VENDOR BILL #	457	AMOUNT	12,000.00	ACCOUNT	2010 Accounts Payable - Accounts Payable - Trade
DATE	11/13/2024	REFERENCE NO.	Testing Workflow	POSTING PERIOD	Nov 2024
VENDOR	Staples - US West	CURRENCY	US Dollar	DUE DATE	12/13/2024
SUBSIDIARY	US West	EXCHANGE RATE	1.00	MEMO	

Classification

LOCATION: US West

PAIRED INTERCOMPANY TRANSACTION: INTERCOMPANY STATUS

Approval

VENDOR BILL APPROVAL STATUS: Rejected

APPROVAL STATUS: Rejected

APPROVE/REJECT NOTES

- 11/13/24 DC - Have updated GL coding to 6655 and resubmit for approval
- 11/13/24 CM - Please correct GL Coding of Bill below to 6655 Computer Office Expense

Approval Information

REJECT REASON

DIST. RELATED JOURNAL

Expenses and Items

CATEGORY	ACCOUNT	AMOUNT	CUSTOMER/PROJECT	BILLABLE	DEPARTMENT	CLASS	LOCATION	AMORT. SCHEDULE	AMORT. START	AMORT. END	PROJECT TASK	RESIDUAL	MEMO	LINE DIST. EXCLUDE	ACTIVITY CODE
6655 Expenses : GAA Expenses : IT Expenses : Computer : Office Expense		12,000.00					US West								

Bill Testing Workflow Staples - US West **PENDING APPROVAL**

Primary Information

VENDOR BILL #	457	AMOUNT	12,000.00
DATE	11/13/2024	REFERENCE NO.	Testing Workflow
VENDOR	Staples - US West	CURRENCY	US Dollar
SUBSIDIARY	US West	EXCHANGE RATE	1.00

Classification

LOCATION: US West

PAIRED INTERCOMPANY TRANSACTION: INTERCOMPANY STATUS

Approval

VENDOR BILL APPROVAL STATUS: Pending Approval

APPROVAL STATUS: Pending Approval

NEXT APPROVER: Carol Morgan

Approval Workflow

▲ Step 7 – Testing the Workflow - Continued

4. Approve the Bill

- › Native Approval Status should become Approved
- › Custom Vendor Bill Approval Status should become Approved
- › Vendor Bill should be locked in all roles except administrator (no Edit Button)

Bill  **Testing Workflow** Staples - US West **PENDING APPROVAL**

[Edit](#) [Back](#) [Cancel Bill](#) [Approve](#) [Reject](#)   [Actions](#)

Primary Information

VENDOR BILL # 457	AMOUNT 12,000.00
DATE 11/13/2024	REFERENCE NO. Testing Workflow
VENDOR Staples - US West	CURRENCY US Dollar
SUBSIDIARY US West	EXCHANGE RATE 1.00

Classification

LOCATION US West	INTERCOMPANY STATUS
PAIRED INTERCOMPANY TRANSACTION	

Approval

VENDOR BILL APPROVAL STATUS Pending Approval	NEXT APPROVER Carol Morgan
APPROVAL STATUS Pending Approval	

Bill  **Testing Workflow** Staples - US West **OPEN**

[Credit](#) [Authorize Return](#) [Make Payment](#)   [Actions](#)

Primary Information

VENDOR BILL # 457	AMOUNT 12,000.00
DATE 11/13/2024	REFERENCE NO. Testing Workflow
VENDOR Staples - US West	CURRENCY US Dollar
SUBSIDIARY US West	EXCHANGE RATE 1.00

Classification

LOCATION US West	INTERCOMPANY STATUS
PAIRED INTERCOMPANY TRANSACTION	

Approval

VENDOR BILL APPROVAL STATUS Approved	NEXT APPROVER Carol Morgan
APPROVAL STATUS Approved	

Approval Workflow

▲ Step 8 – Release the Workflow

- Now that have tested the workflow if confident has covered all use cases, you can set the status of the workflow to released instead of testing

Workflow

Save | Cancel | Change ID | Actions

Basic Information

RECORD TYPE
Transaction

SUB TYPES *

- Advanced Intercompany Journal Entry
- Cash Refund
- Cash Sale
- Check

NAME *
SN MC Bill Approval Workflow

ID
customworkflow_sn_mc_vb_approval

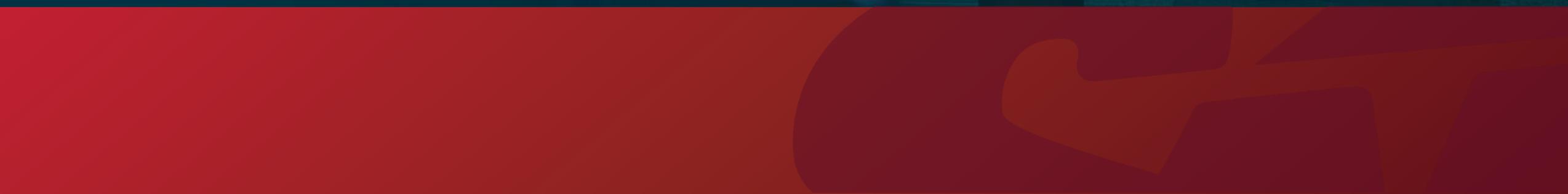
DESCRIPTION

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Released

Send Email Workflow



Send Email Workflow

▲ Use Case

- In this example, the business process that we want to automate via workflows is the emailing of customer statements to customers who are past due. Will set up a workflow that runs on a weekly schedule to email all customers with overdue balances >15 days their statement and a reminder to pay their bills promptly.
- What follows are the steps we will take to create the workflow for this process

Send Email Workflow

- ▲ 1. Create a Customer Past Due Balance Saved Search that can be used by the workflow
 - Navigate to reports>New Search
 - Select Customer Search Type
 - Check the used Advanced search checkbox
 - Add the following Criteria

Saved Customer Search

Save & Run | Cancel | Preview | Actions

SEARCH TITLE *
SN MC Days Overdue Workflow Search

ID
[Empty field]

PUBLIC
 AVAILABLE AS LIST VIEW

Criteria | Results | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log | Search Title Translation

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard • Summary	
FILTER *	DESCRIPTION *
Days Overdue	is greater than 15

Send Email Workflow

- ▲ 1. Create a Customer Past Due Balance Saved Search that can be used by the workflow – Continued
 - Add the following Results

Saved Customer Search

Save & Run | Cancel | Preview | Actions

SEARCH TITLE *
SN MC Days Overdue Workflow Search

ID

PUBLIC
 AVAILABLE AS LIST VIEW

Criteria | **Results** | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log | Search Title Translation

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
ID DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

OUTPUT TYPE
Normal

SHOW TOTALS

MAX RESULTS
 RUN UNRESTRICTED DIS
 MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields

Remove all | Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL
Internal ID					
ID					
Name					
Email					
Phone					
Office Phone					
Primary Contact					
Alt. Email					
Days Overdue					

Send Email Workflow

- ▲ 1. Create a Customer Past Due Balance Saved Search that can be used by the workflow – Continued
 - Can see the results of the saved search when save and run

SN MC Days Overdue Workflow Search: Results

[Learn about NetSuite Analytics Warehouse](#) [List](#) [Search](#) [Audit Trail](#)

Edit this Search

Add

FILTERS

STYLE

Normal

NEW	EDIT VIEW	INTERNAL ID	INTERNAL ID	ID *	NAME	EMAIL	PHONE	OFFICE PHONE	PRIMARY CONTACT	ALT. EMAIL	DAYS OVERDUE
	Edit View	367	367		Copper Software	info@coppersoftware.com	(619) 680-0662		Dustin Frank		44
	Edit View	2243	2243		Intercompany US1- UK						215
	Edit View	273	273		Jasper and Associates	info@jasperandassociates.com	(707) 046-3046		Jessie Bryant		44
	Edit View	2227	2227		Renner Inc	info@rennerinc.com	(574) 278-5381		Christopher Gentry		44
	Edit View	251	251		The Altima Technology	info@thealtimatechnology.com	(805) 485-6750		Kelli Dean		44
		Total									391

Send Email Workflow

▲ 2. Create Workflow

- Navigate to Customization>Workflow>Workflows>New

The screenshot shows the Oracle NetSuite interface. At the top left is the 'ORACLE NetSuite' logo. A search bar is located at the top center. Below the search bar is a navigation bar with tabs for 'Activities', 'Payments', 'Transactions', 'Lists', 'Reports', 'Analytics', 'Customization', 'Documents', 'Setup', 'Implementation', and 'Administrative'. The 'Customization' tab is selected. Below the navigation bar, the main content area displays 'SN MC Days Overdue Workflow Search: Results'. There are buttons for 'Edit this Search' and 'Add'. A 'FILTERS' section is visible with a 'STYLE' dropdown set to 'Normal'. On the right side, a sidebar menu is open, listing 'Customization Overview', 'Lists, Records, & Fields', 'Forms', 'Scripting', 'Workflow', and 'New'. The 'Workflow' item is highlighted in yellow, and its sub-menu is open, showing 'Workflows' and 'New'. The 'New' item is also highlighted in yellow and circled in red.

Send Email Workflow

▲ 2. Create Workflow

- Fill out the following Basic Information and initiation

Save

Basic Information

RECORD TYPE *
Customer

SUB TYPES *
Customer
Lead
Prospect

NAME *
SN MC Send Overdue Balance Email Work Fl

ID
_sn_mc_send_over_due_bal_

DESCRIPTION

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Testing

KEEP INSTANCE AND HISTORY
Only When Testing

ENABLE LOGGING

INACTIVE

Initiation

EVENT BASED SCHEDULED

Send Email Workflow

▲ 2. Create Workflow

- Fill out the following Schedule Information and Save the Workflow

Initiation

EVENT BASED SCHEDULED

Schedule

SAVED SEARCH FILTER *
SN MC Days Overdue Workflow Search ▼

REPEAT

FREQUENCY
Weekly ▼

SCHEDULED FROM DATE *
11/13/2024

SCHEDULED UNTIL DATE

EXECUTION TIME *
noon ▼

Weekly Schedule

Repeat every 1 week(s)

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Send Email Workflow

▲ 2. Create Workflow

- Now we have our blank workflow

Workflow: SN MC Send Overdue Balance Email Work Fl



- We can edit/rename state 1 to Send Weekly Stmt to Overdue Customers
 - While the workflow is in edit not view mode, double click on state 1 and rename it

Workflow State

Save | Cancel | Change ID | Actions

WORKFLOW
SN MC Send Overdue Balance Email Work Fl

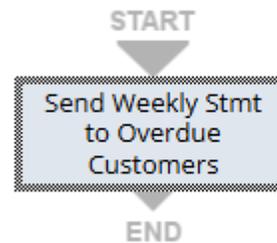
NAME *
Send Weekly Stmt to Overdue Customers

ID
workflowstate74

Actions | Transitions | Fields | Translation •

Move To Top | Move To Bottom | New Action | New Group

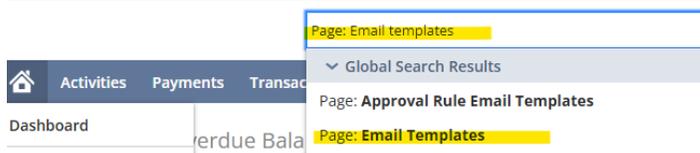
ID	NAME	PARAMETERS	TRIGGER ON	EVENT T
No records to show.				



Send Email Workflow

▲ 2. Create Workflow

- Next we will want to create an Email Template that can be used by the workflow to send the email and attach the customer statement
- In the global search bar can search Page: Email Templates



- Click New – created a simple email template that can use

A screenshot of the 'Email Template' creation form. The form has a title 'Email Template' and buttons for 'Save', 'Cancel', 'Change ID', and 'Actions'. The 'NAME' field is filled with 'Send Overdue Balance Email Workflow Template'. The 'SUBJECT' field contains a merge field: '\$(customer.companyName), - \$(customer.daysOverdue)'. Below the subject, there are radio buttons for 'FILE' and 'TEXT EDITOR', with 'TEXT EDITOR' selected. A rich text editor is visible with a toolbar and the following text: 'Dear \$(customer.companyName),
Per our records your account is \$(customer.daysOverdue) overdue. Please see your attached customer statement. We value our partnership and would kindly ask to bring your account current as soon as possible to avoid any pause/disruption in our services.
Best Regards,'.

Send Email Workflow

▲ 2. Create Workflow

- Now that we have renamed our state and have our email template we can add our send email action to our workflow
- Double click on the action and then hit the new action button

Workflow State

Save | Cancel | Change ID | Actions

WORKFLOW
SN MC Send Overdue Balance Email Work Fl

NAME *
Send Weekly Stmt to Overdue Customers

ID
workflowstate74

Actions | Transitions | Fields | Translation •

Move To Top | Move To Bottom | **New Action** | New Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TY
No records to show.				

Send Email Workflow

▲ 2. Create Workflow

- Now that we have renamed our state and have our email template we can add our send email action to our workflow
- While the workflow is in edit, not view mode, double click on the state
- Click add new Action
- Select Send Email
- Complete the following

The screenshot displays the configuration interface for a 'Send Email' action within a workflow. The interface is divided into several sections:

- Parameters:** A dropdown menu is expanded to show 'Sender' and 'Recipient' options.
- Sender:** Includes radio buttons for 'SPECIFIC SENDER' (selected), 'FROM FIELD', and 'FROM FIELD'. Under 'SPECIFIC SENDER', there is a 'SENDER *' dropdown menu with 'Dean Carazza' selected. Under 'FROM FIELD', there is a 'RECORD (JOIN FIELD)' dropdown menu with 'Current Record' selected and a 'FIELD' dropdown menu.
- Recipient:** Includes radio buttons for 'SEND TO CURRENT RECORD' (selected), 'SPECIFIC RECIPIENT', and 'FREE FORM ADDRESS'. Under 'SEND TO CURRENT RECORD', there is a 'RECIPIENT' dropdown menu with '<Type then tab>' selected. Under 'FREE FORM ADDRESS', there is an 'EMAIL' text input field with a three-dot menu icon.
- Content:** Includes radio buttons for 'USE TEMPLATE' (selected) and 'CUSTOM'. Under 'USE TEMPLATE', there is a 'TEMPLATE*' dropdown menu with 'Send Overdue Balanc... Workflow Template' selected. Below this is a 'SUBJECT' text input field and a 'BODY' text area with a rich text editor toolbar (bold, italic, underline, paragraph, link, etc.). At the bottom of the 'Content' section is an 'INCLUDE VIEW RECORD LINK' checkbox.
- Attachment:** Includes a radio button for 'FILE' which is selected.

Send Email Workflow

▲ 2. Create Workflow

Workflow Action

SEND TO CURRENT RECORD

SPECIFIC RECIPIENT

RECIPIENT
<Type then tab>

FREE FORM ADDRESS

EMAIL
[...]

FROM FIELD

RECORD (JOIN FIELD)
Current Record

FIELD
[...]

CC
[...]

BCC
[...]

INCLUDE VIEW RECORD LINK

Attachment

FILE

<Type then tab>

FROM FIELD

RECORD (JOIN FIELD)
Current Record

FIELD
[...]

INCLUDE STATEMENT

TYPE
PDF

STATEMENT DATE
today

START DATE
[...]

SHOW ONLY OPEN TRANSACTIONS

CONSOLIDATED STATEMENT

USE CUSTOMER'S LOCALE

Save Cancel

Send Email Workflow

▲ 2. Create Workflow

- Now that we have added our Send Email action can see it summarized here on the state

Workflow State

[Save](#) [Cancel](#) | [Change ID](#) | [Actions](#)

WORKFLOW
SN MC Send Overdue Balance Email Work Fl

NAME *

ID
workflowstate74

DESCRIPTION

DO NOT EXIT WORK
 START STATE

Actions • [Transitions](#) [Fields](#) [Translation](#) •

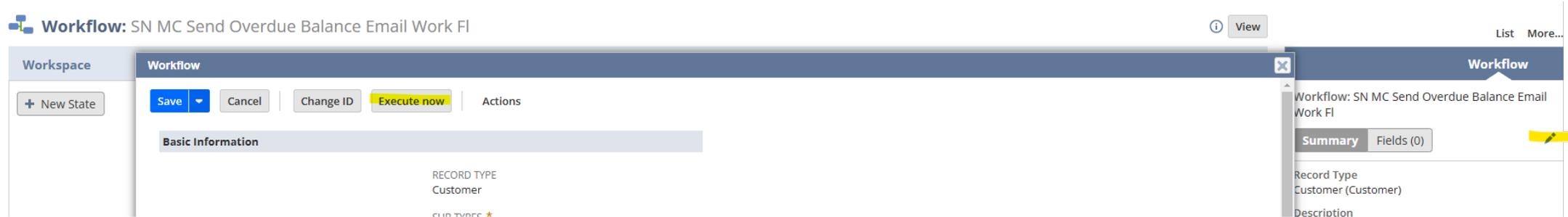
[Move To Top](#) [Move To Bottom](#) [New Action](#) [New Group](#)

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	COND
workflowaction283	Send Email	To: Current Record, Template: Send Overdue Balance Email Workflow Template, Include Statement	Entry	Selected All	Selected 37 of 39	

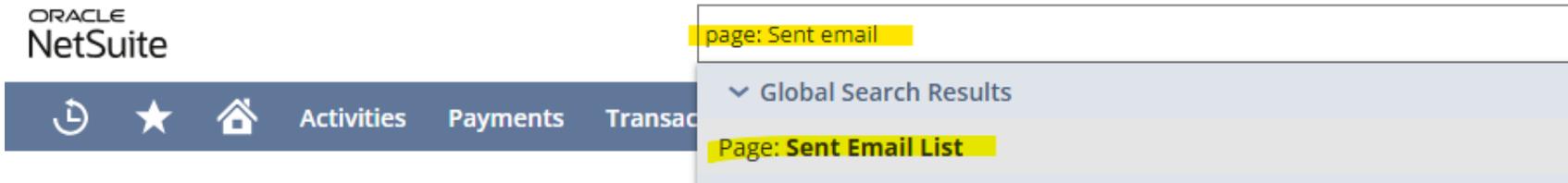
Send Email Workflow

▲ 2. Create Workflow

- Now that we have created our workflow we can test it to confirm working as expected
- If we edit the workflow>Pencil icon in the right corner of the console, should see option to execute now



- Expectation is that should send email with attached PDF statement to those customers that had overdue balances on our saved search
- One way to tell if the emails went out is to go to the Sent Emails Page – type Page: Sent Email List in the global search bar



Send Email Workflow

▲ 2. Create Workflow

- Can see the emails went out and are included in the list

#	SENT DATE ▼	LOG DATE	FROM	SUBJECT	TO RECIPIENTS	CC RECIPIENTS	BO
1	11/13/2024 7:46 pm	11/13/2024 7:46 pm	"NetSuite Alerts (automailer@netsuite.com)"	Workflow Failure : SN MC Send Overdue Balance Email Work Fl (originally To: dcarazza@scalenorth.com)	dcarazza@scalenorth.com		
2	11/13/2024 7:46 pm	11/13/2024 7:46 pm	"Dean Carazza (dcarazza@scalenorth.com)"	Copper Software, - 44 overdue - Please make payment to bring account current (originally To: info@coppersoftware.com)	dcarazza@scalenorth.com		
3	11/13/2024 7:46 pm	11/13/2024 7:46 pm	"Dean Carazza (dcarazza@scalenorth.com)"	The Altima Technology, - 44 overdue - Please make payment to bring account current (originally To: info@thealtimatechnology.com)	dcarazza@scalenorth.com		
4	11/13/2024 7:46 pm	11/13/2024 7:46 pm	"Dean Carazza (dcarazza@scalenorth.com)"	Renner Inc, - 44 overdue - Please make payment to bring account current (originally To: info@rennerinc.com)	dcarazza@scalenorth.com		
5	11/13/2024 7:46 pm	11/13/2024 7:46 pm	"Dean Carazza (dcarazza@scalenorth.com)"	Jasper and Associates, - 44 overdue - Please make payment to bring account current (originally To: info@jasperandassociates.com)	dcarazza@scalenorth.com		
6	11/13/2024 7:35 pm	11/13/2024 7:35 pm	"Dean Carazza (dcarazza@scalenorth.com)"	Davidson Supplies, - 13 overdue - Please make payment to bring account current (originally To: dcarazza@scalenorth.com)	dcarazza@scalenorth.com		

Send Email Workflow

▲ 2. Create Workflow

- Can bring up that customer and go to communication tab to see the email that went out and attachment

Customer

Copper Software

[Edit](#) [Back](#) [Accept Payment](#) [Actions](#)

Primary Information

CUSTOMER ID Copper Software	SUBSIDIARY US West	SALES REP Will Clark
TYPE Company	STATUS CUSTOMER-Closed Won	LEAD SOURCE Web
COMPANY NAME Copper Software	REPRESENTS SUBSIDIARY	LAST MODIFIED DATE 11/17/2024
		<input type="checkbox"/> TRANSACTIONS NEED AP

Email | Phone | Address

PHONE (619) 680-0662	EMAIL info@coppersoftware.com	
INDUSTRY	ANNUAL REVENUE	LAST SALES ACTIVITY
NO. OF EMPLOYEES	EMAIL ADDRESS FOR PAYMENT NOTIFICATION	

Communication Sales Relationships Financial Marketing Address Preferences System Information Bank Payment Details (Debit) Bank Payment Details (Credit) Customer360 Subs

Activities **Messages** Files User Notes

VIEW
Default

[Email](#) [Attach](#) [Letter](#) [PDF](#) [Fax](#) [Refresh](#) [View History](#) [Customize View](#)

#	VIEW	DATE ▼	AUTHOR	PRIMARY RECIPIENT	SUBJECT	TYPE	FILES
1	View	11/13/2024 7:46 pm	Dean Carazza	Copper Software	Copper Software, - 44 overdue - Please make payment to bring account current	Email	Yes

Recipients **Message** Attachments

Bill To
Dustin Frank
Copper Software
379 Visalia Circle
Orlando FL 32811
United States

Date	Description	Charge	Payment	Balance	
8/28/2024	Invoice #313	1,974.00		1,974.00	
9/30/2024	Invoice #320	6,495.00		8,469.00	
11/3/2024	Invoice #255	804.00		9,273.00	
Current	1-30 Days	31-60 Days	61-90 Days	Over 90 Days	Amount Due
804.00	6,495.00	1,974.00	0.00	0.00	\$9,273.00

SUBJECT
Copper Software, - 44 overdue - Please make payment to bring account current

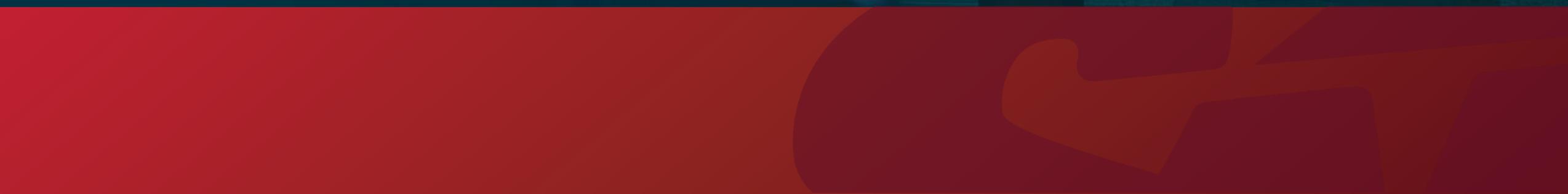
MESSAGE

Dear Copper Software,

Per our records your account is 44 overdue. Please see your attached customer statement. We value our partnership and would kindly ask to bring your account current as soon as possible to avoid any pause/disruption in our services.

Best Regards,

Dynamically Set Required Fields Via Workflow



Dynamically Set Required Fields Workflow

▲ Use Case

- In this example, the business process is that all customers who are extended credit terms should have their DUNS or D&B Number and Delinquency Score logged on the customer record. Therefore, to help with compliance and to ensure this accurate information in the credit process is captured we want to dynamically make both of these fields required when a new Customer is extended terms.



Understand your Business Scores & Ratings, so you can Plan for your Business's Future

Strong business credit scores may not only help you to secure favorable financing terms and attract potential investors, but it may also signal reliability and trustworthiness to interested suppliers, partners, and customers.



- What follows are the steps to dynamically make these fields required using a workflow

Dynamically Set Required Fields Workflow

▲ 1. Create the Fields Needed

Custom Entity Field

Save | Cancel | Change ID | Apply to Forms | Actions

LABEL *
DUNS Number

ID
custentity_sn_duns_num

INTERNAL ID
3750

OWNER
Dean Carazza

DESCRIPTION

TYPE
Free-Form Text

LIST/RECORD

STORE VALUE USE ENCRYPTED FORMAT

Applies To | Display | Validation & Defaulting | Sourcing & Filtering | Access | Translation | History

CUSTOMER CONTACT

Custom Entity Field

Save | Cancel | Change ID | Apply to Forms | Actions

LABEL *
D&B Delinquency Score

ID
custentity_sn_db_delinquency_score

INTERNAL ID
3751

OWNER
Dean Carazza

DESCRIPTION

TYPE
Free-Form Text

LIST/RECORD

STORE VALUE USE ENCRYPTED FORMAT

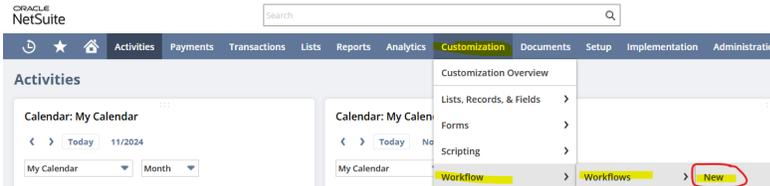
Applies To | Display | Validation & Defaulting | Sourcing & Filtering | Access | Translation | History

CUSTOMER CONTACT

Dynamically Set Required Fields Workflow

▲ 1. Create the Workflow

- Navigate to Customization>Workflow>Workflows>New



- Complete the following Basic Information

A screenshot of the 'Basic Information' form for a workflow in Oracle NetSuite. The form is titled 'Basic Information' and has a 'Save' button and a 'Cancel' button at the top left. The form fields are: 'RECORD TYPE' (dropdown menu with 'Customer' selected), 'SUB TYPES' (list box with 'Customer', 'Lead', and 'Prospect', where 'Customer' is selected), 'NAME' (text field with 'SN MC Set Req Field WF'), 'ID' (text field with 'sn_mc_set_req_field_wf'), 'DESCRIPTION' (empty text area), 'OWNER' (dropdown menu with 'Dean Carazza'), 'EXECUTE AS ADMIN' (checkbox, checked), 'RELEASE STATUS' (dropdown menu with 'Testing'), 'KEEP INSTANCE AND HISTORY' (dropdown menu with 'Only When Testing'), 'ENABLE LOGGING' (checkbox, checked), and 'INACTIVE' (checkbox, unchecked). Below the 'Basic Information' section are two other sections: 'Initiation' with 'EVENT BASED' selected and 'SCHEDULED' unselected, and 'Event Definition' with 'ON CREATE' and 'ON VIEW OR UPDATE' checked, and 'USE' with 'VISUAL BUILDER' selected and 'CUSTOM FORMULA' unselected.

Dynamically Set Required Fields Workflow

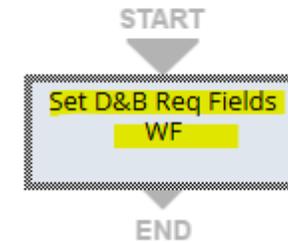
- ▲ 2. Update State and add actions
 - Now that we have are workflow we can rename the state and start adding our set required field actions
 - While the workflow is in edit, not view mode, double click state 1 and rename to Set D&B Required Fields WF

Workflow: SN MC Set Req Field WF



The "Workflow State" configuration panel shows the following details:

- Buttons: Save, Cancel, Change ID, Actions
- WORKFLOW: SN MC Set Req Field WF
- NAME *: Set D&B Req Fields WF
- ID: workflowstate76
- Actions: Move To Top, Move To Bottom, New Action, New Group
- Table headers: ID, NAME, PARAMETERS, TRIGGER ON, EVENT TY
- Message: No records to show.



Dynamically Set Required Fields Workflow

- ▲ 2. Update State and add actions
 - Now that we have renamed our state, we can start adding our Set Required Field Workflow Actions
 - We will need the following Actions for the following Trigger Types
 - Before Load – Is so workflow runs each time the page is loaded – N = 4

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction284	Set Field Mandatory	DUNS Number = True	Before Record Load	Selected All	Selected 37 of 39	Terms = 1% 10 Net 30,2% 10 Net 30,Net 15,Net 30,Net 60						✓
workflowaction285	Set Field Mandatory	DUNS Number = False	Before Record Load	Selected All	Selected 37 of 39	Terms != 1% 10 Net 30,2% 10 Net 30,Net 15,Net 30,Net 60						✓
workflowaction286	Set Field Mandatory	D&B Delinquency Score = True	Before Record Load	Selected All	Selected 37 of 39	Terms = 1% 10 Net 30,2% 10 Net 30,Due on receipt,Net 15,Net 60						✓
workflowaction287	Set Field Mandatory	D&B Delinquency Score = False	Before Record Load	Selected All	Selected 37 of 39	Terms != 1% 10 Net 30,2% 10 Net 30,Net 15,Net 30,Net 60						✓

Dynamically Set Required Fields Workflow

▲ 2. Update State and add actions

- Now that we have renamed our state, we can start adding our Set Required Field Workflow Actions
- We will need the following Actions for the following Trigger Types
 - After Field Edit – Is so workflow runs while on page and after field is edited – N = 4
 - › Note the Triggering Client Field is Terms



ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction288	Set Field Mandatory	DUNS Number = True	After Field Edit	Selected All	Selected 37 of 39	Terms = 1% 10 Net 30,2% 10 Net 30,Net 15,Net 30,Net 60						✓
workflowaction289	Set Field Mandatory	DUNS Number = False	After Field Edit	Selected All	Selected 37 of 39	Terms != 1% 10 Net 30,2% 10 Net 30,Due on receipt,Net 15,Net 30,Net 60						✓
workflowaction290	Set Field Mandatory	D&B Delinquency Score = True	After Field Edit	Selected All	Selected 37 of 39	Terms = 1% 10 Net 30,2% 10 Net 30,Net 15,Net 30,Net 60						✓
workflowaction291	Set Field Mandatory	D&B Delinquency Score = False	After Field Edit	Selected All	Selected 37 of 39	Terms != 1% 10 Net 30,2% 10 Net 30,Net 15,Net 30,Net 60						✓

Dynamically Set Required Fields Workflow

▲ 2. Test Workflow

- Now that we have added all our Workflow State Actions. Can test the workflow with following tests
 1. Test that when creating a new customer, if select Net Terms see the DUNS Number and D&B Delinquency Score Fields both become required fields and if select a Terms that are not Net, the fields are no longer required
 2. Test that when editing the terms for an existing customer, if select Net Terms see the DUNS Number and D&B Delinquency Score Fields both become required fields and if select a Terms that are not Net, the fields are no longer required
- What Follows are the Testing Steps above

Dynamically Set Required Fields Workflow

▲ 2. Test Workflow

1. Test that when creating a new customer, if select Net Terms see the DUNS Number and D&B Delinquency Score Fields both become required fields and if select a Terms that are not Net, the fields are no longer required
 - Field Not Required, then once select Terms both fields become required

COMPANY NAME *

REPRESENTS SUBSIDIARY

▼ Email | Phone | Address

PHONE

EMAIL

INDUSTRY

ANNUAL REVENUE

NO. OF EMPLOYEES

EMAIL ADDRESS FOR PAYMENT NOTIFICATION

Communication Sales Relationships **Financial** Marketing Address Preferences System Information Bank Payment De

▼ Account Information

DUNS NUMBER

D&B DELINQUENCY SCORE

ACCOUNT

DEFAULT RECEIVABLES ACCOUNT

DEFERRED REVENUE ACCOUNT FOR REVENUE RECLASSIFICATION

START DATE

▼ Tax Information

TAX ITEM

Credit Cards Currencies Group Pricing Item Pricing

END DATE

REMINDER DAYS

PRICE LEVEL

PRIMARY CURRENCY *

TERMS

1% 10 Net 30

2% 10 Net 30

Due on receipt

Installment Test 1

Net 15

Net 30



COMPANY NAME *

REPRESENTS SUBSIDIARY

▼ Email | Phone | Address

PHONE

EMAIL

INDUSTRY

ANNUAL REVENUE

NO. OF EMPLOYEES

EMAIL ADDRESS FOR PAYMENT NOTIFICATION

Communication Sales Relationships **Financial** Marketing Address Preferences System Information Bank Payment De

▼ Account Information

DUNS NUMBER *

D&B DELINQUENCY SCORE *

ACCOUNT

DEFAULT RECEIVABLES ACCOUNT

DEFERRED REVENUE ACCOUNT FOR REVENUE RECLASSIFICATION

START DATE

▼ Tax Information

TAX ITEM

END DATE

REMINDER DAYS

PRICE LEVEL

PRIMARY CURRENCY *

TERMS

Net 15

Dynamically Set Required Fields Workflow

▲ 2. Test Workflow

2. Test that when editing the terms for an existing customer, if select Net Terms see the DUNS Number and D&B Delinquency Score Fields both become required fields and if select a Terms that are not Net, the fields are no longer required
- Change existing customer terms from Due on Receipt can see both fields become required

CUSTOMER ID Davidson Supplies Davidson Supplies	SUBSIDIARY US West
TYPE Company	STATUS CUSTOMER-Closed Won
COMPANY NAME Davidson Supplies	REPRESENTS SUBSIDIARY

▼ Email | Phone | Address

PHONE (415) 555-0199	EMAIL info@davidsonsupplies.c
INDUSTRY	ANNUAL REVENUE
NO. OF EMPLOYEES	EMAIL ADDRESS FOR PAYM

Communication Sales Relationships **Financial** Marketing Address Preferences System Inform

▼ Account Information

DUNS NUMBER	END DATE
D&B DELINQUENCY SCORE	REMINDER DAYS
ACCOUNT	PRICE LEVEL
DEFAULT RECEIVABLES ACCOUNT Use System Preference	PRIMARY CURRENCY US Dollar
DEFERRED REVENUE ACCOUNT FOR REVENUE RECLASSIFICATION	TERMS Due on receipt
START DATE 10/03/2024	CREDIT LIMIT HOLD 500,000.00 On



Customer Davidson Supplies Davidson Supplies

Save Cancel Merge Actions

▼ Primary Information

CUSTOMER ID Davidson Supplies Davidson Supplies	SUBSIDIARY US West
TYPE <input checked="" type="radio"/> COMPANY <input type="radio"/> INDIVIDUAL	STATUS * CUSTOMER-Closed Won
COMPANY NAME * Davidson Supplies	REPRESENTS SUBSIDIARY

▼ Email | Phone | Address

PHONE (415) 555-0199	EMAIL info@davidsonsupplies.com
INDUSTRY	ANNUAL REVENUE
NO. OF EMPLOYEES	EMAIL ADDRESS FOR PAYMENT NOTIFICATION

Communication Sales Relationships **Financial** Marketing Address Preferences System Information Bank Payment Details (Debit)

▼ Account Information

DUNS NUMBER *	END DATE
D&B DELINQUENCY SCORE *	REMINDER DAYS
ACCOUNT	PRICE LEVEL
DEFAULT RECEIVABLES ACCOUNT Use System Preference	PRIMARY CURRENCY * US Dollar
DEFERRED REVENUE ACCOUNT FOR REVENUE RECLASSIFICATION	TERMS Net 30

Dynamically Set Required Fields Workflow

▲ 3. Release Workflow

- Now that we have finished testing, we can change the status of the workflow to released

Workflow

Save | **Cancel** | **Change ID** | **Actions**

Basic Information

RECORD TYPE
Customer

SUB TYPES *

Customer
Lead
Prospect

NAME *
SN MC Set Req Field Workflow

ID
customworkflow_sn_mc_set_req_field_wf

DESCRIPTION

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Released

Questions?

Next Steps

- ▲ Going to send out Recording and This Deck to all those Registered and who attended today
- ▲ Will be hosting monthly with next one targeted to be Friday 12/06/24 or 12/13/24 12-1PM PST
 - Thinking next topic will be a joint Masterclass with one of our Technology Partners on Automating Financial Process
 - Budgeting
 - Forecasting
 - Reporting
- ▲ If you have any NetSuite pain points, enhancements, integrations or any questions we would be happy to setup a quick chat and see how we can help
 - Send me an email or give me a call
 - dcarazza@scalenorth.com
 - 714-350-6211



NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

scalenorth.com

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