ScaleNorth NetSuite MasterClass – Session 2 – Workflows

11/15/2024

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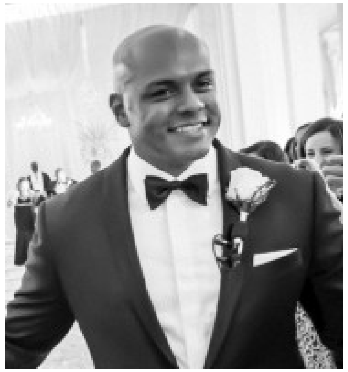
Agenda

- 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

650+
NetSuite Certifications Held by Staff

$2.5B+
Annual Revenue Transactions Processed

1,250+
Years of Collective NetSuite ERP Experience

7.5+
Avg Years of NetSuite Experience

58%
Percentage of staff with CPAs

ORACLE NETSUITE
BPO Partner

ORACLE NETSUITE
Solution Provider

ORACLE NETSUITE
SuiteCloud Developer Network

Services at a Glance

NetSuite Implementation

Outsourced Accounting

NetSuite Consulting

Technical Services

scalenorth

Technology Partners

celigo

Avalara
Tax compliance done right

vena

rfsmart

pacejet

netgain
SHARPER TOOLS FOR A SMARTER SUITE

Zone&Co

bill

SPS COMMERCE

tipalti

versapay

boomi
Powering the Data Economy

highradius

avidxchange

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 <=$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

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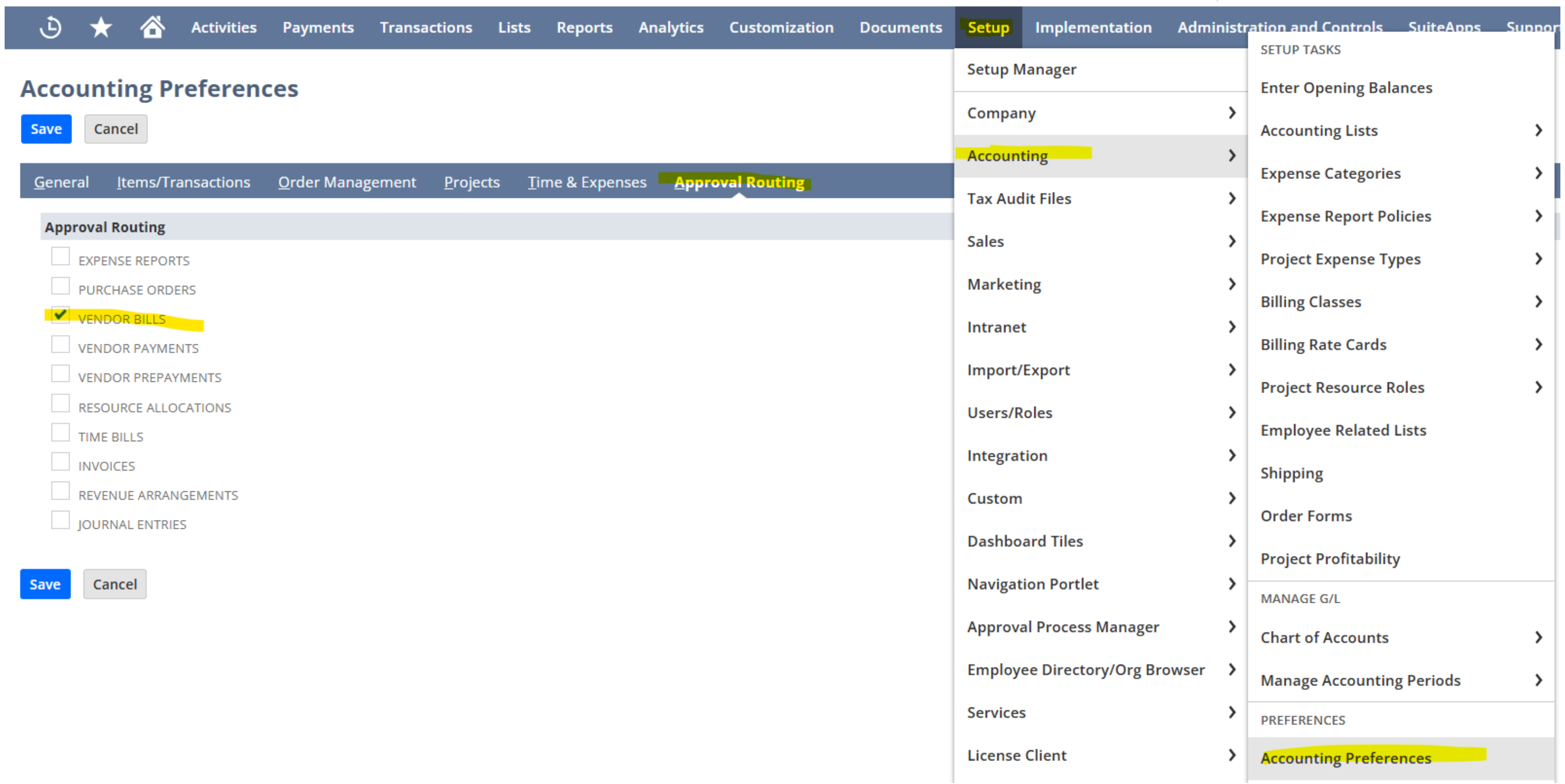
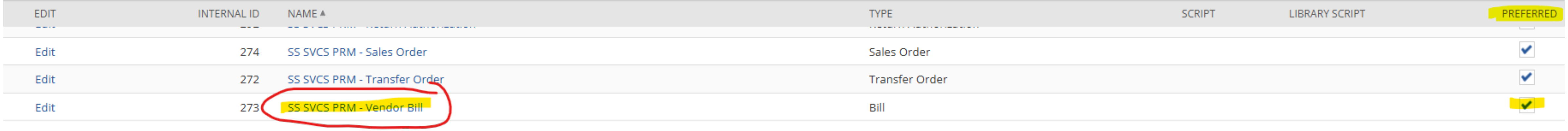
Approval Workflow

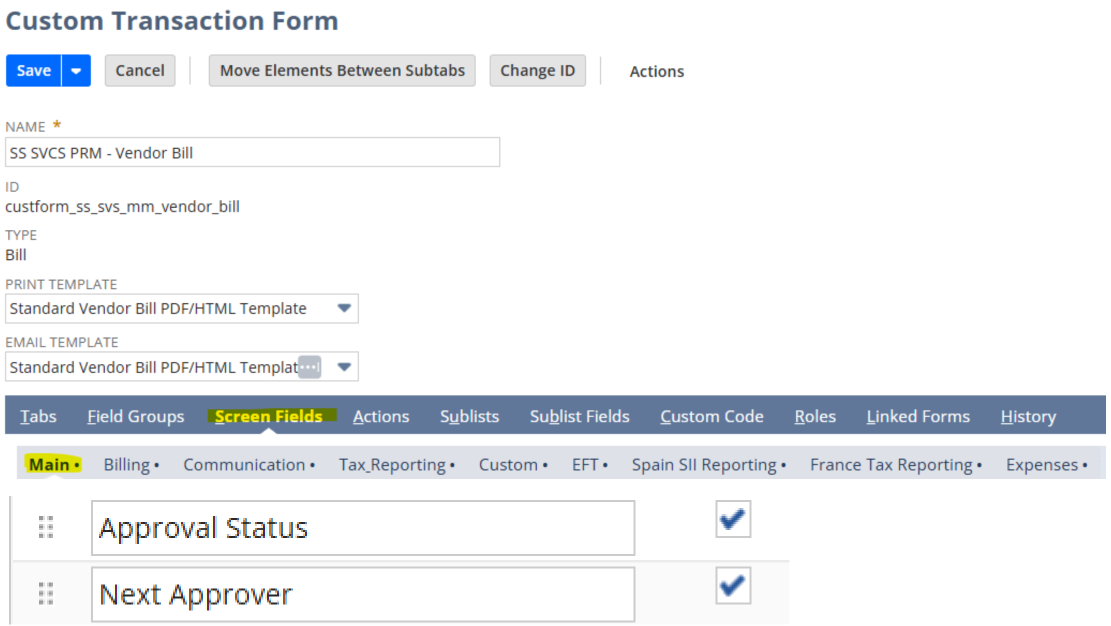
- Step 1 – Approval Routing Enabled
  - Make sure have Approval Routing Enabled for the transaction type/record that is applicable
    - Example, in this case since we want a Vendor Bill Approval, we want to make sure Approval Routing is enabled for Vendor Bills
      - Navigate to Setup>Accounting>Accounting Preferences>



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



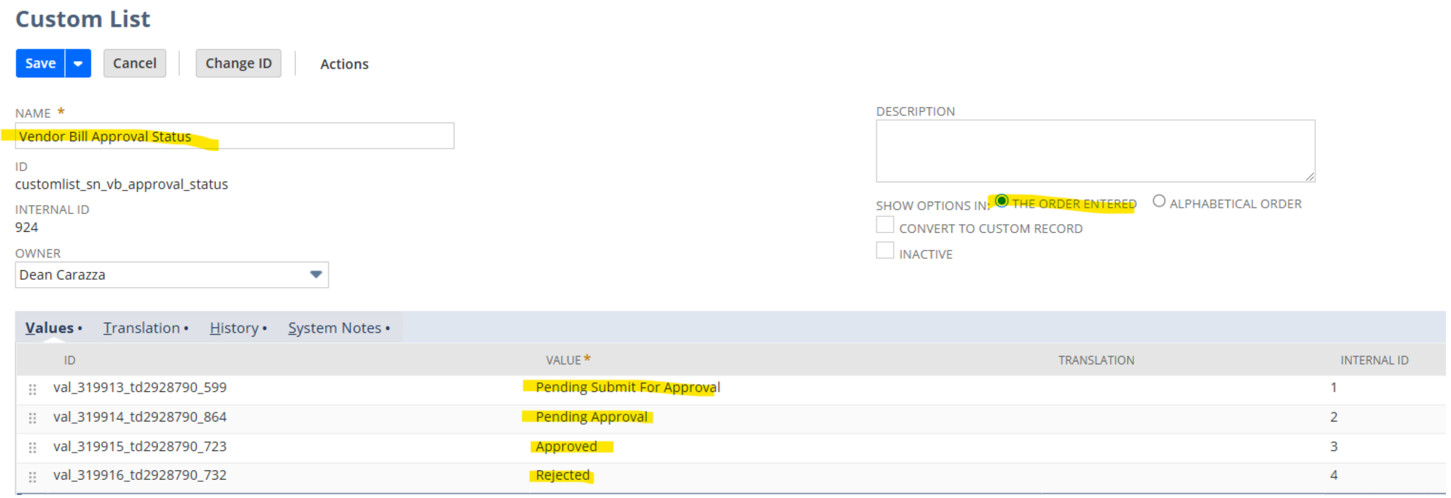


Approval Workflow

- 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

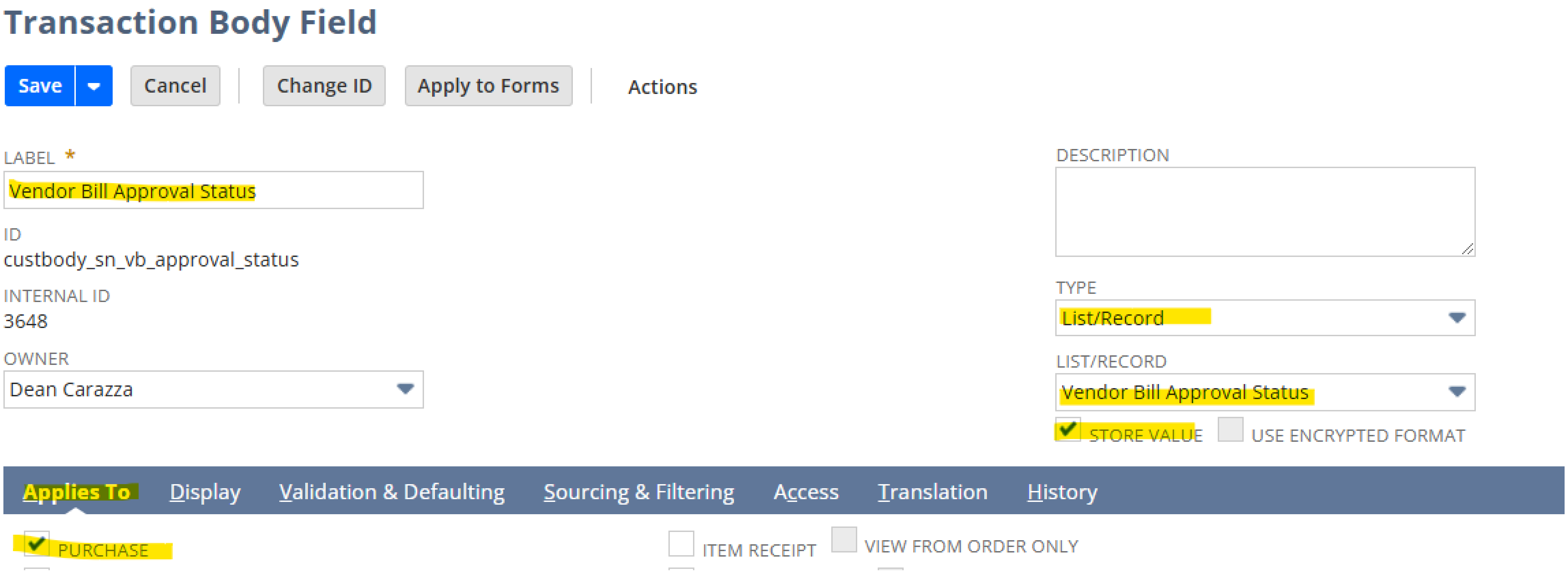
    With only these three options available, it is possible a user has entered a bill, but is maybe not yet ready to be submitted for approval (still has some initial QC/checks before wanting to submit for approval (GL Coding is proper, validate Terms, etc.).

    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



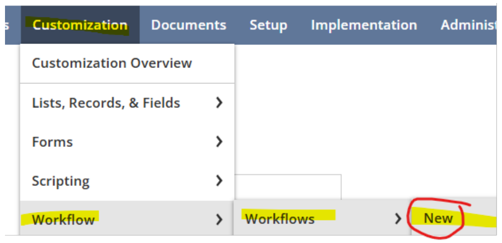
Approval Workflow

- 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

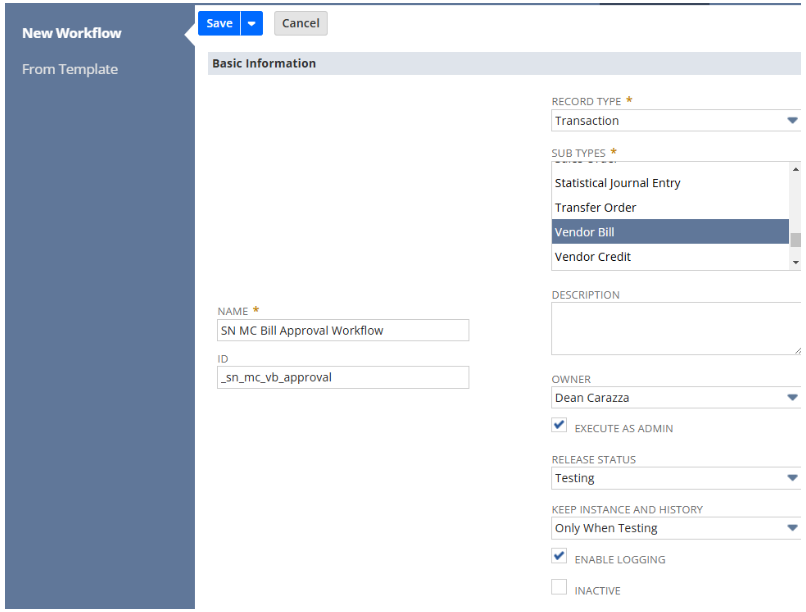


Approval Workflow

- 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.



Approval Workflow

- Step 4 – Create New Approval Workflow – Continued

Initiation

(•) EVENT BASED ( ) SCHEDULED

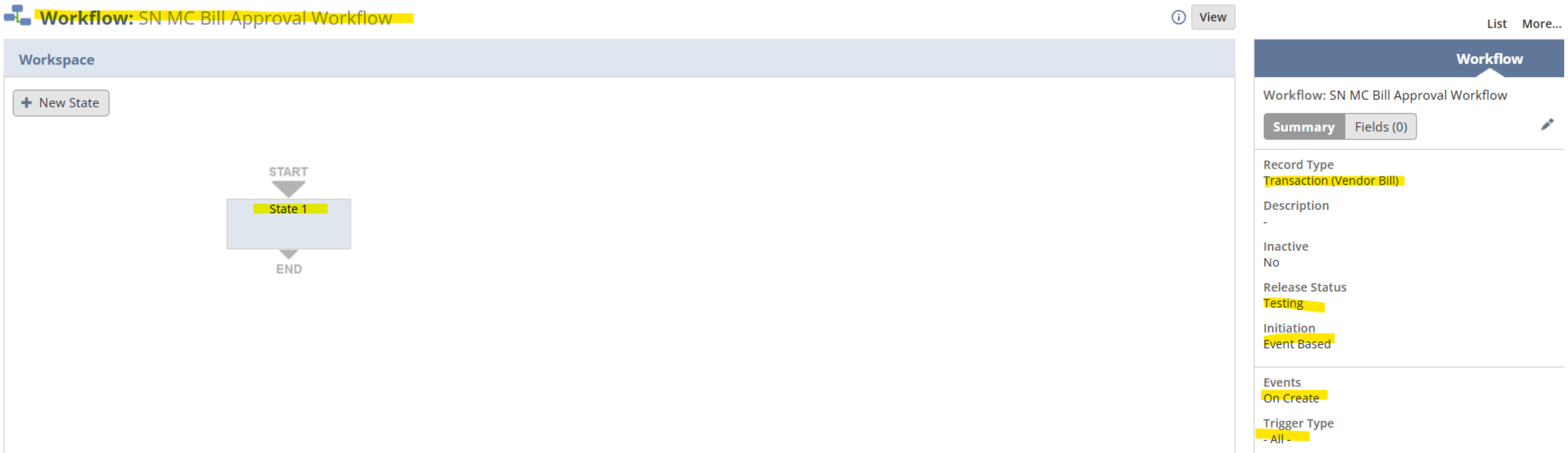
Event Definition

[x] ON CREATE

[ ] ON VIEW OR UPDATE

USE (•) VISUAL BUILDER ( ) CUSTOM FORMULA

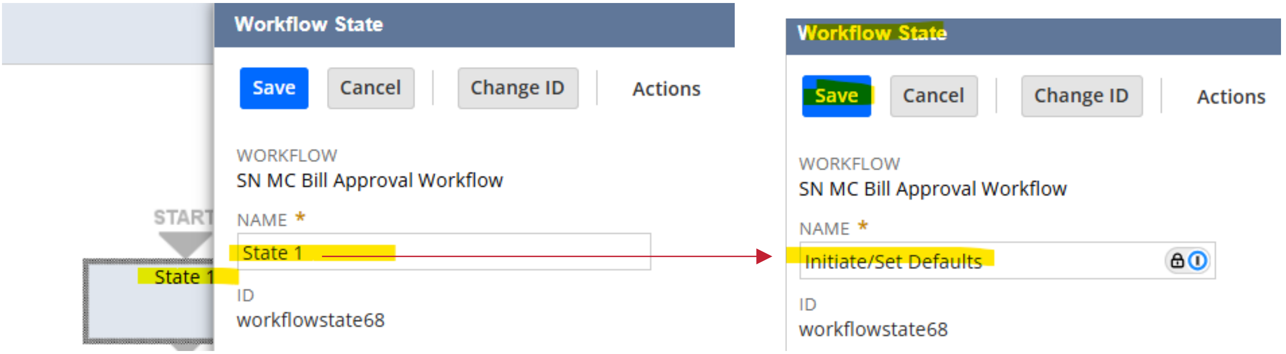
- Save the Record – creates a new workflow with placeholder state 1



Approval Workflow

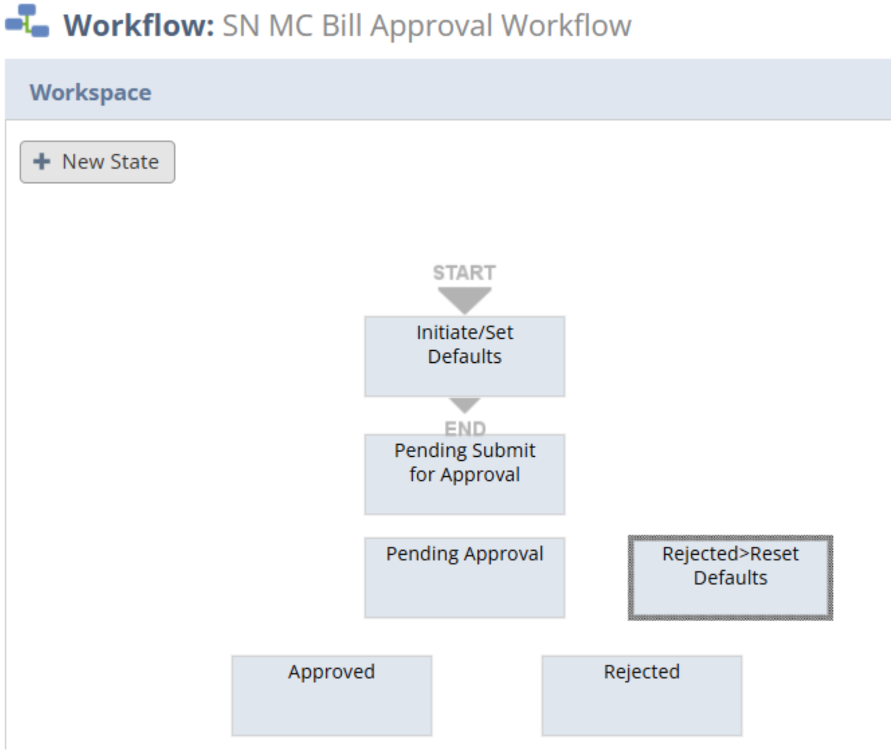
- Step 5 – start adding desired states/ transitions and visual mockup and place holder of process flow
  - We can start adding our placeholder states and transitions to see the visualized flow. Once feeling good about flow than we can start adding our desired actions within in each state and transition.
  - 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



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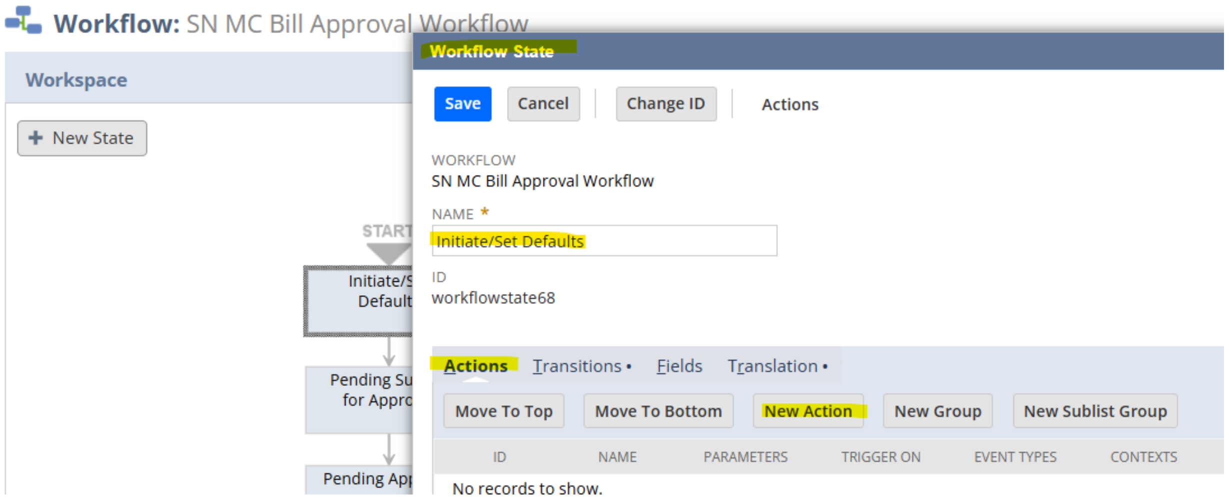
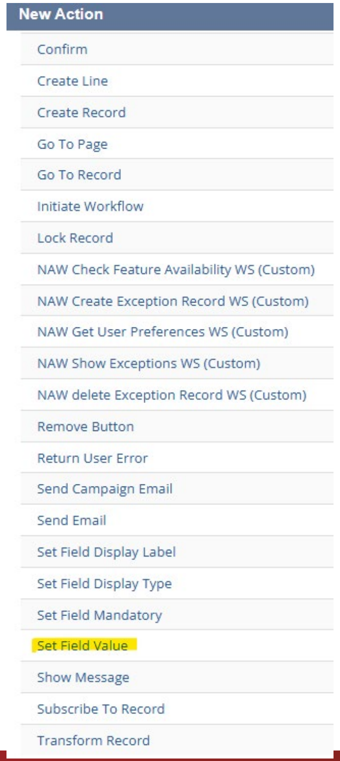
Approval Workflow

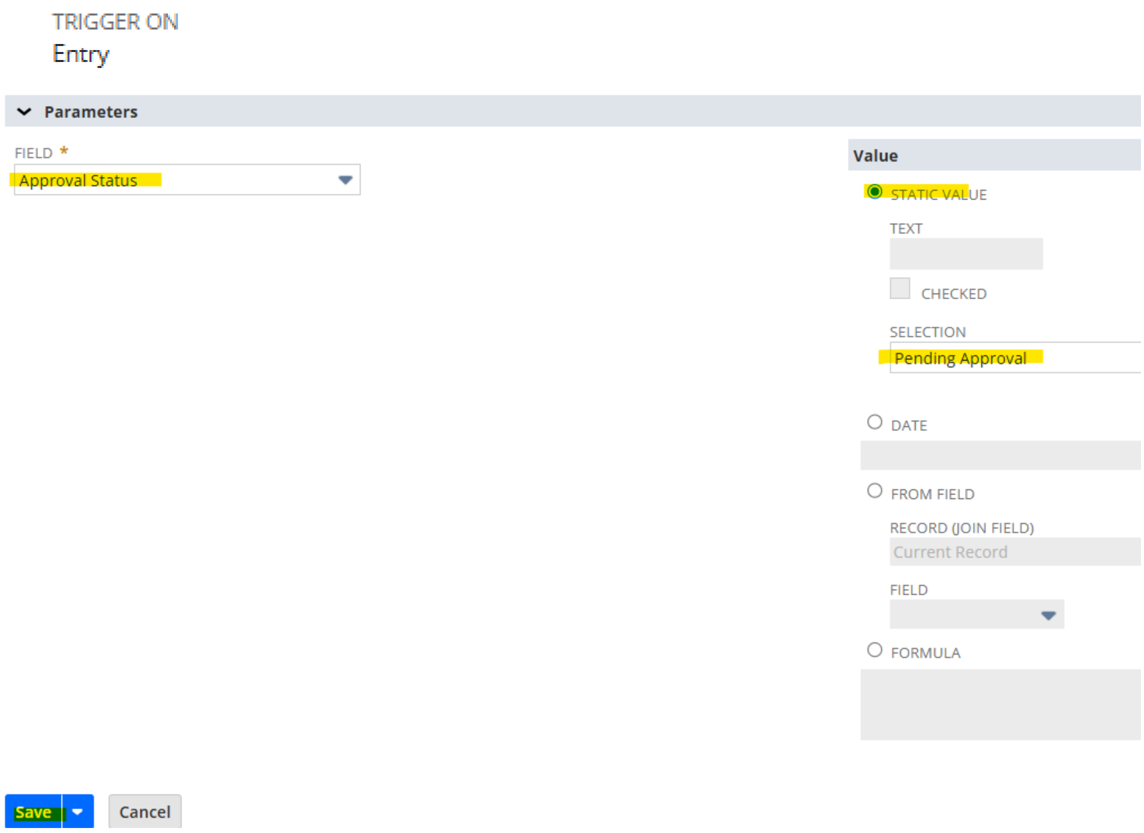
- Step 6 – Adding Actions and conditions to each state and transition
  - Will start by adding actions to our first State in our workflow – Initiate/Set Defaults
    - The first time a Vendor Bill enters our workflow will be in this state, so want to reset approval status fields to pending approval and 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





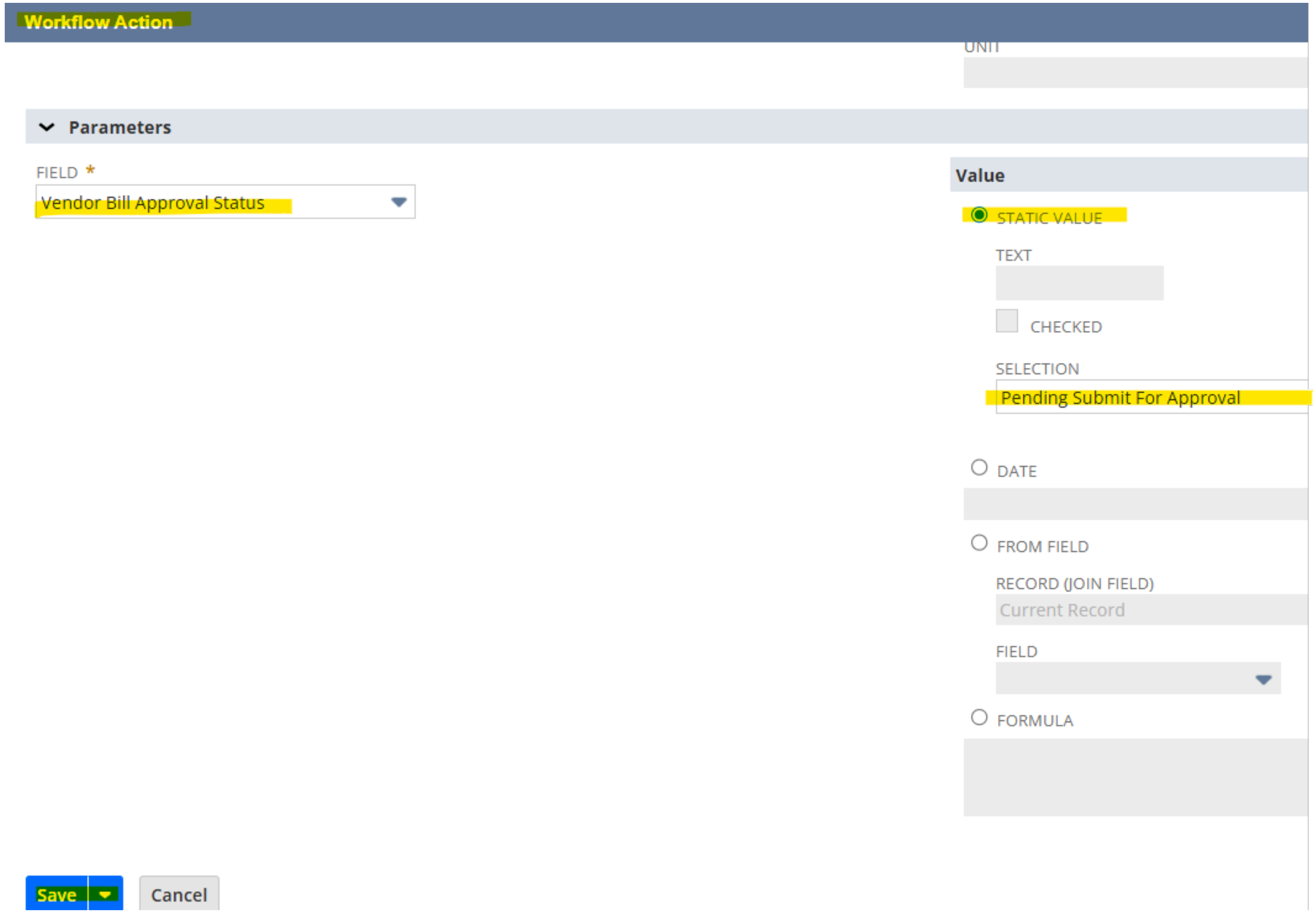
Approval Workflow

- 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



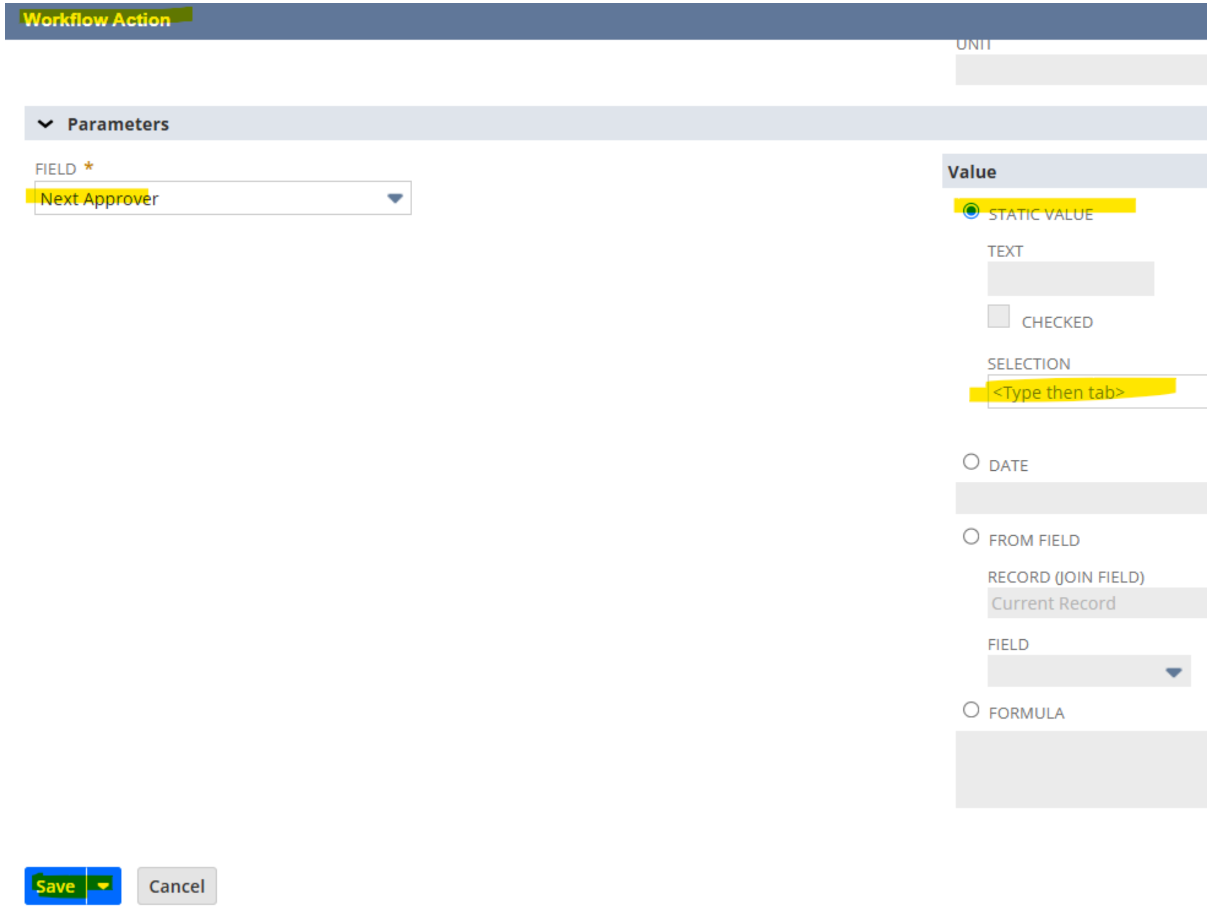
Approval Workflow

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



Approval Workflow

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



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 *
Initiate/Set Defaults

ID
workflowstate68

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

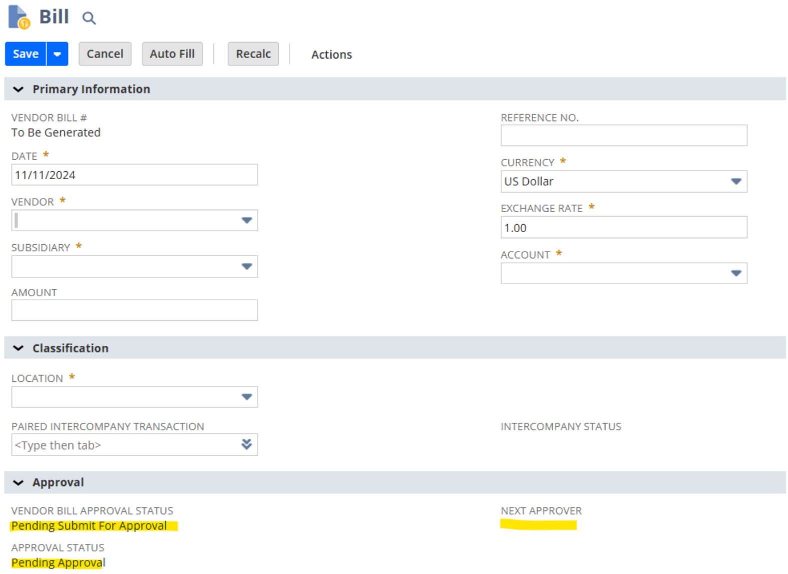
Actions • | Transitions • | Fields | Translation •

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							✓
workflowaction265	Set Field Value	Vendor Bill Approval Status=Pending Submit For Approval	Entry	Selected All	Selected 37 of 39							✓
workflowaction266	Set Field Value	Next Approver=null	Entry	Selected All	Selected 37 of 39							✓

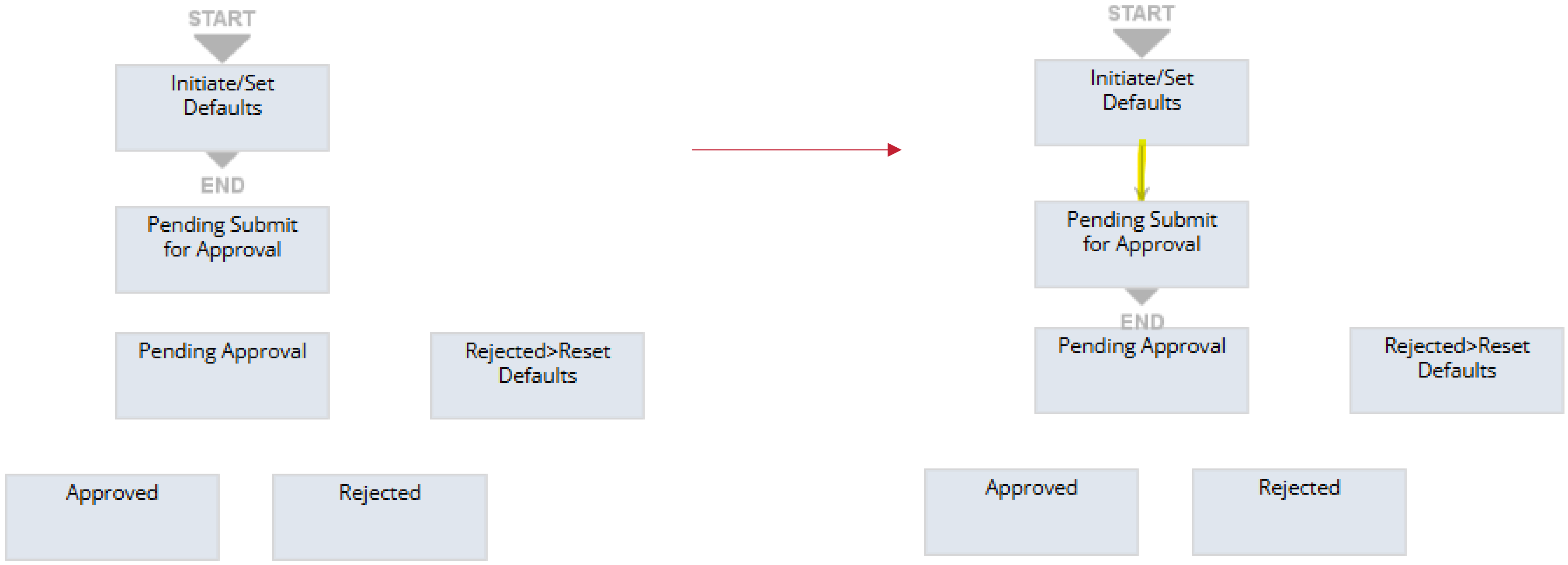
Approval Workflow

- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - 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
    - <u>*Note make sure Workflow is in view mode not edit whenever testing the workflow*</u>
    - Navigate to Transactions>Payables>Enter Bills



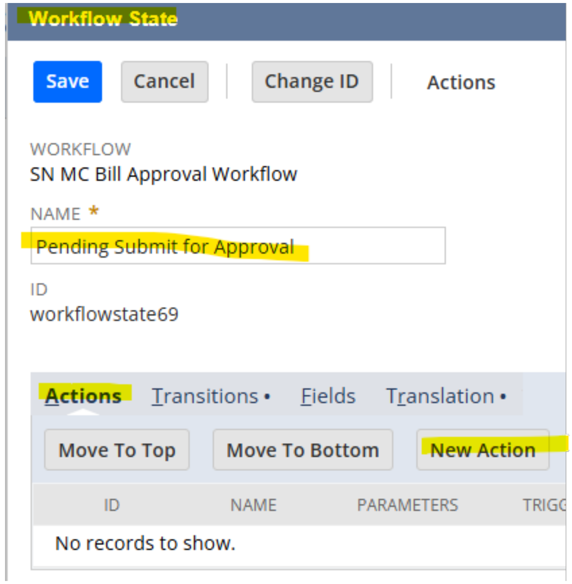
Approval Workflow

- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Now that we have added our actions to the first sate, 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



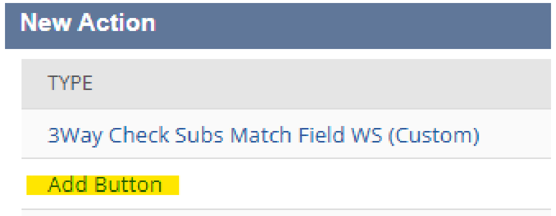
Approval Workflow

- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Now that we have finished adding our actions to our first sate 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



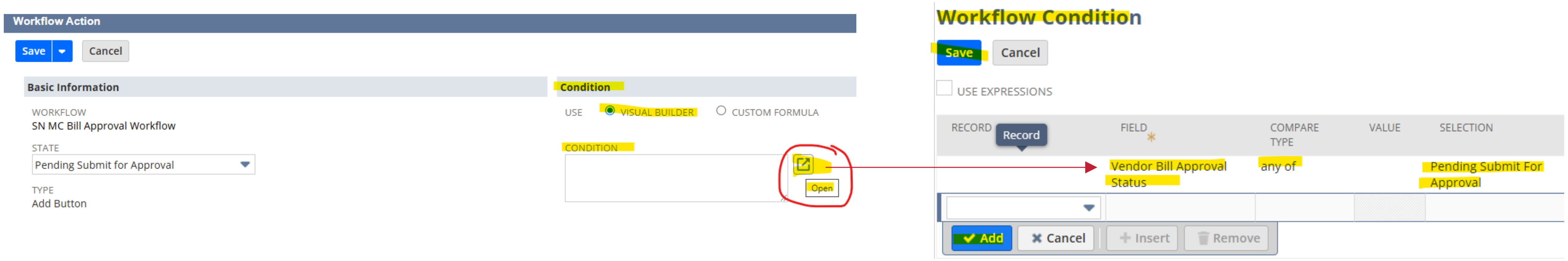
Approval Workflow

- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Click the New Action Button
  - Select the Add Button Action



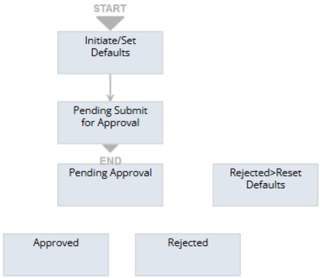
  - Before Record Load
  -

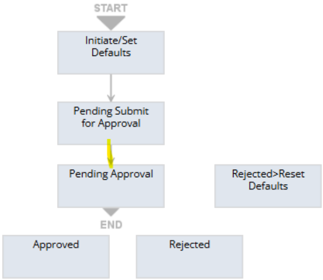
  - Scroll up and click into the condition box and click the open icon to add the following condition



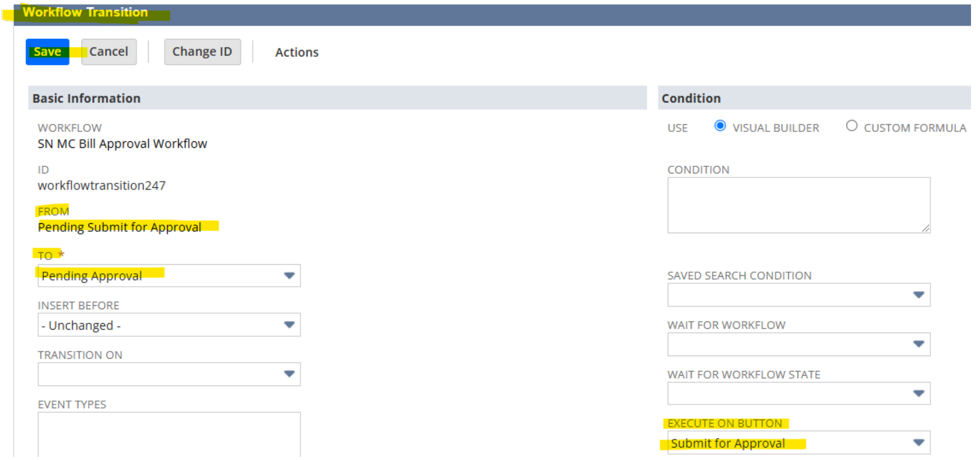
Approval Workflow

- 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



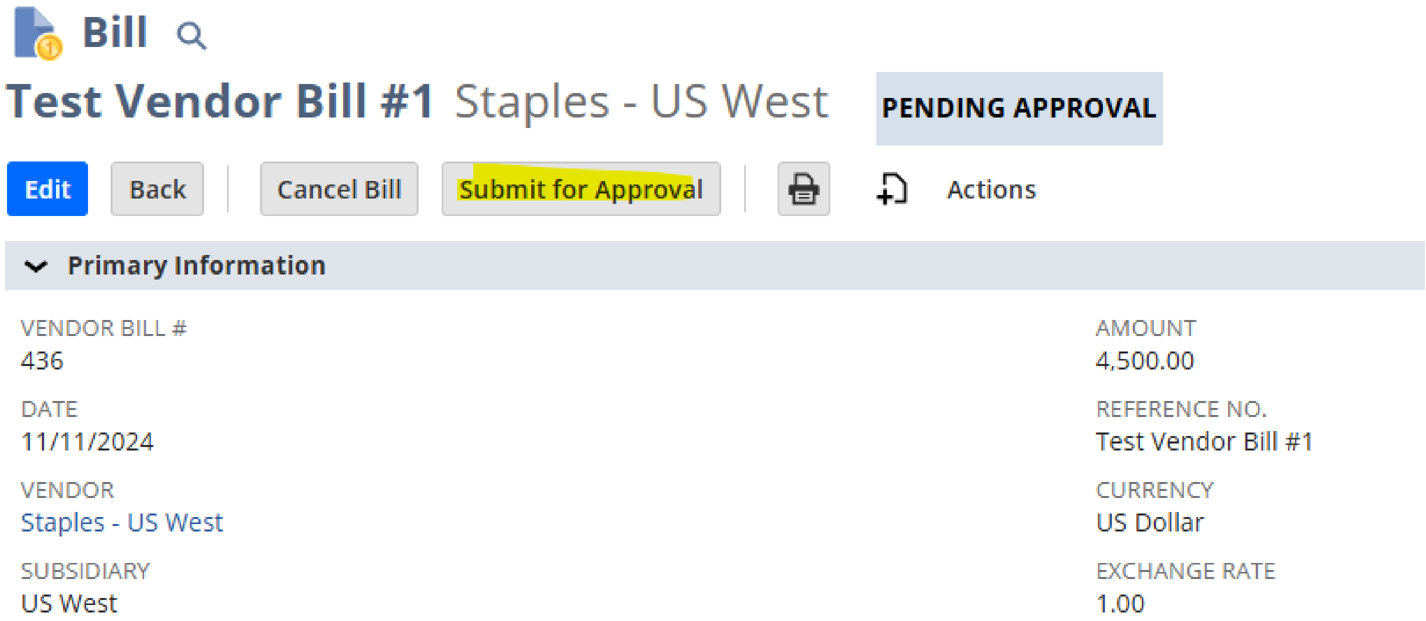


  - Set the Execute on Button Value to – Submit for Approval



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

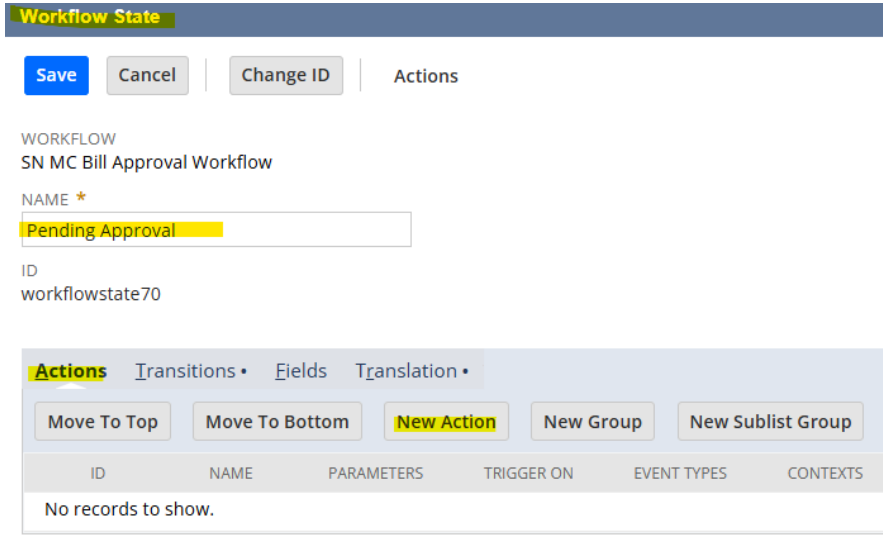


Approval Workflow

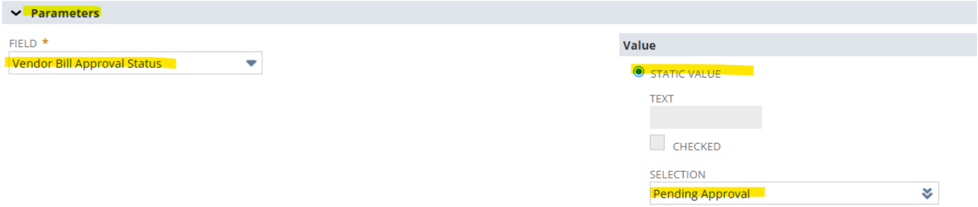
- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Now that we have successfully tested our action for the Pending Submit for Approval State, we can proceed to adding our action and transition on trigger to the Pending Approval State
  - We want to add the following Actions to the Pending Approval State
    - Set Field Value – to Pending Approval when enters this state
    - Set Field Value – Next Approver – based on <=$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

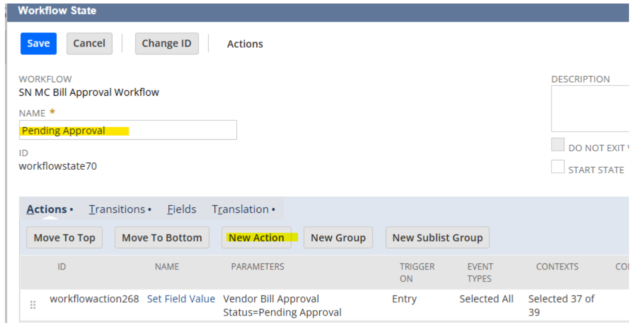


  - Trigger on Entry
  - Select the Set Field Value Action and input the following and hit Save

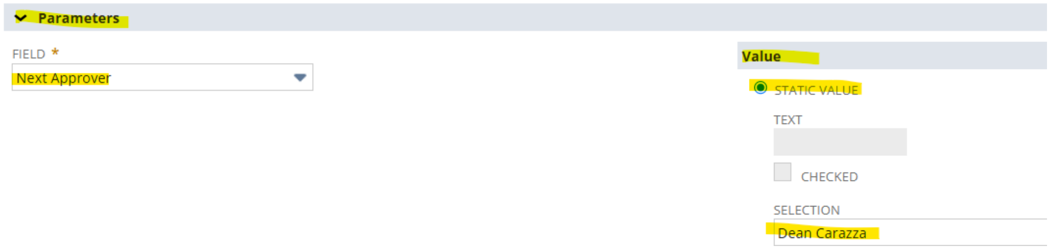


Approval Workflow

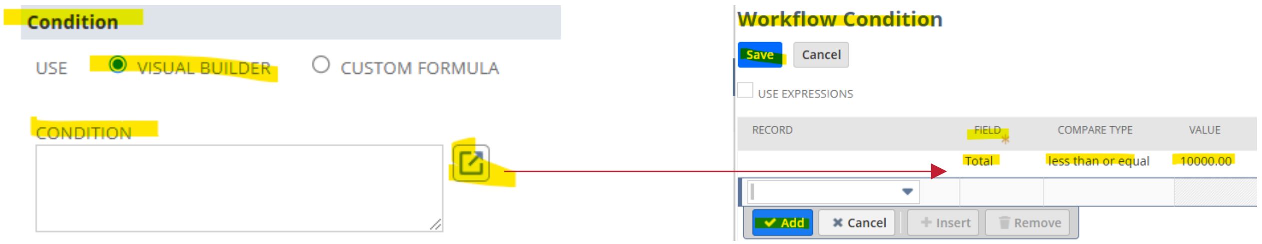
- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Set Field Value – Next Approver – based on <=$10,000 condition – Dean Carazza
  - Click to add a new Action



  - Set Field Value

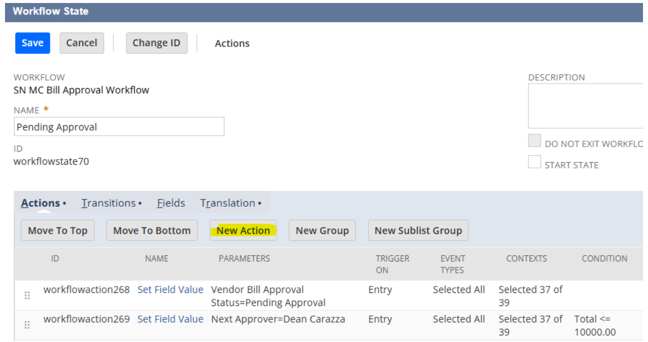


  - Condition

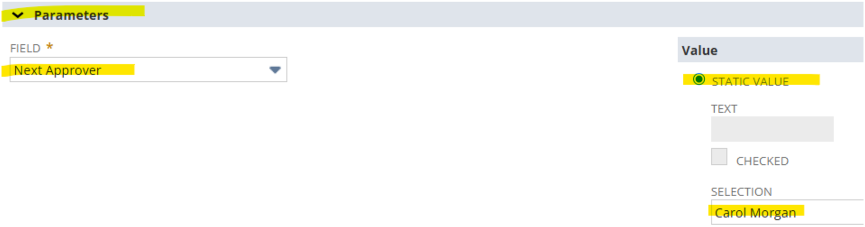


Approval Workflow

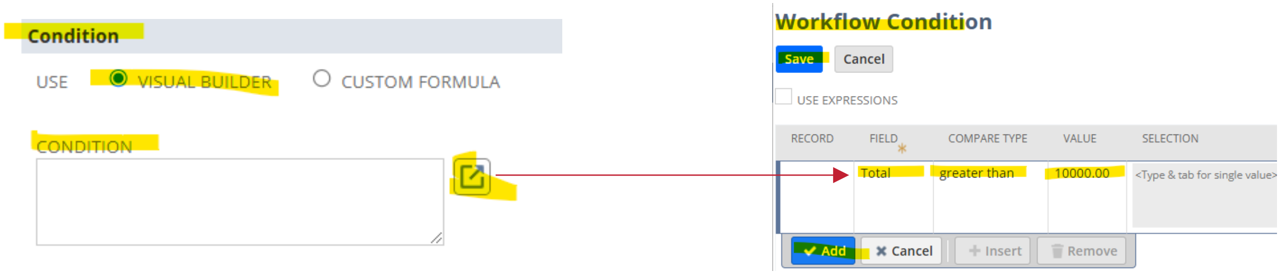
- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Set Field Value – Next Approver – Based on >$10,000 condition – Carol Morgan
  - Click to add a new Action



  - Set Field Value

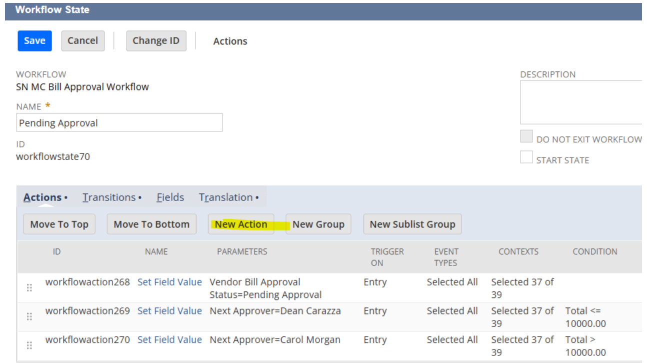


  - Condition

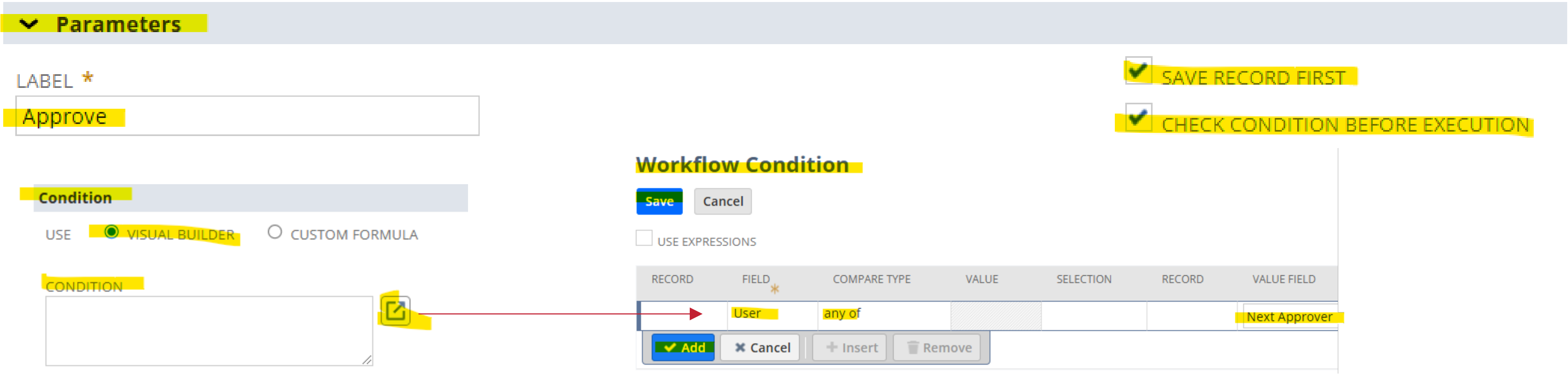


Approval Workflow

- 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



  - Add Button
  - Trigger Before Record Load



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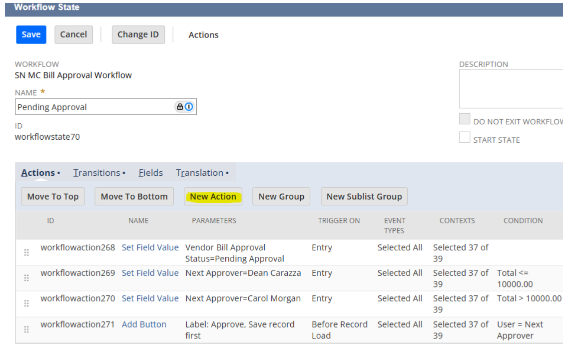
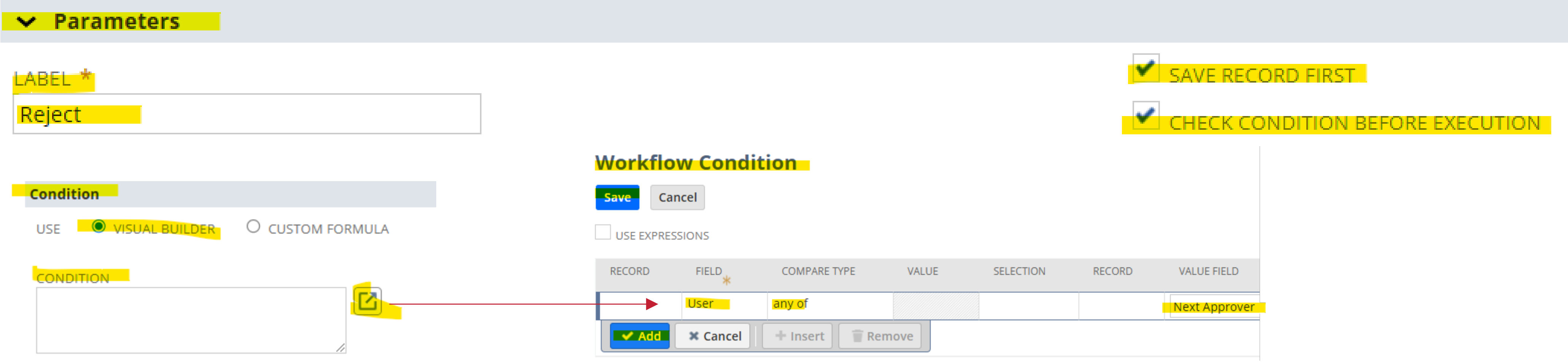
Approval Workflow

- 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



  - Add Button
  - Trigger Before Record Load
  -



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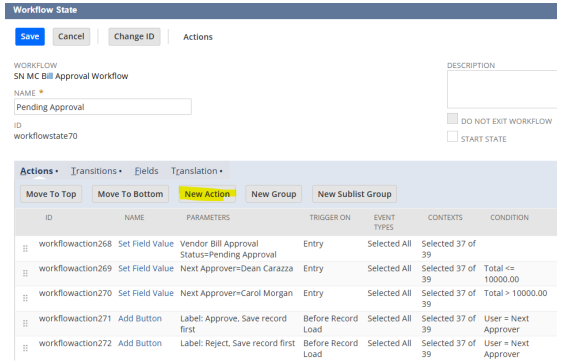
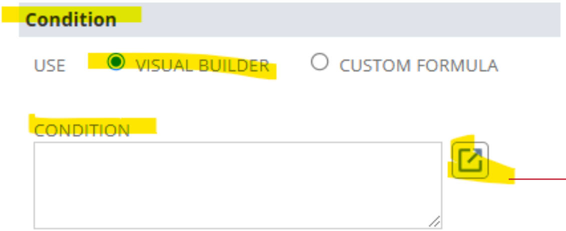
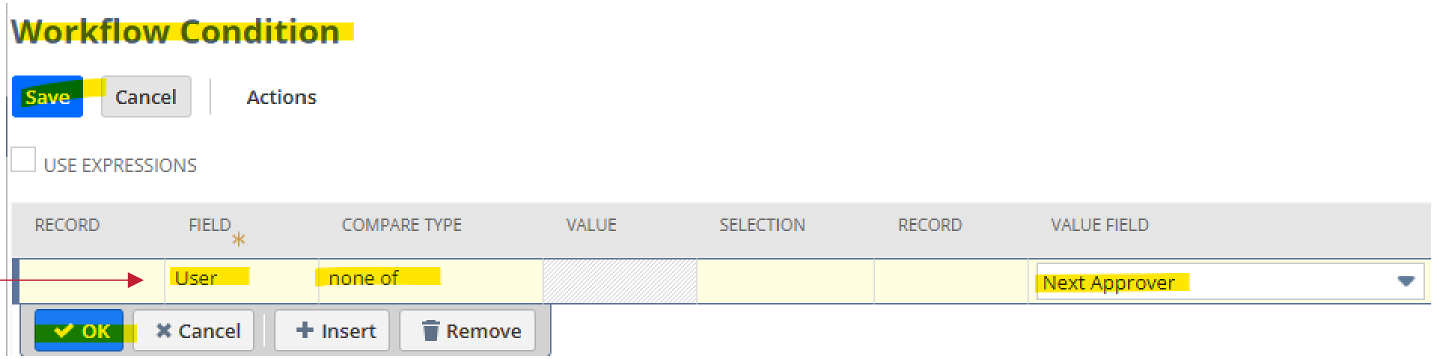
Approval Workflow

- 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



  - Lock Record
  - Trigger on Before Record Load
  - Condition





  | Version 1.0

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 •

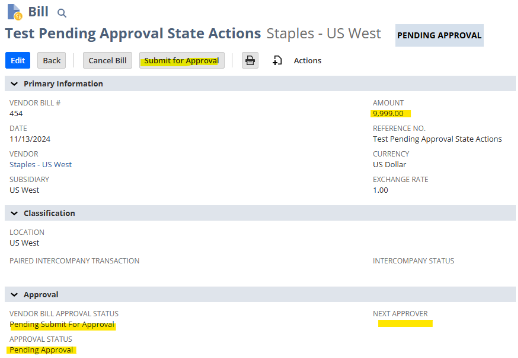
Move To Top | Move To Bottom | New Action | New Group | New Sublist Group

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						✓

scalenorth

Approval Workflow

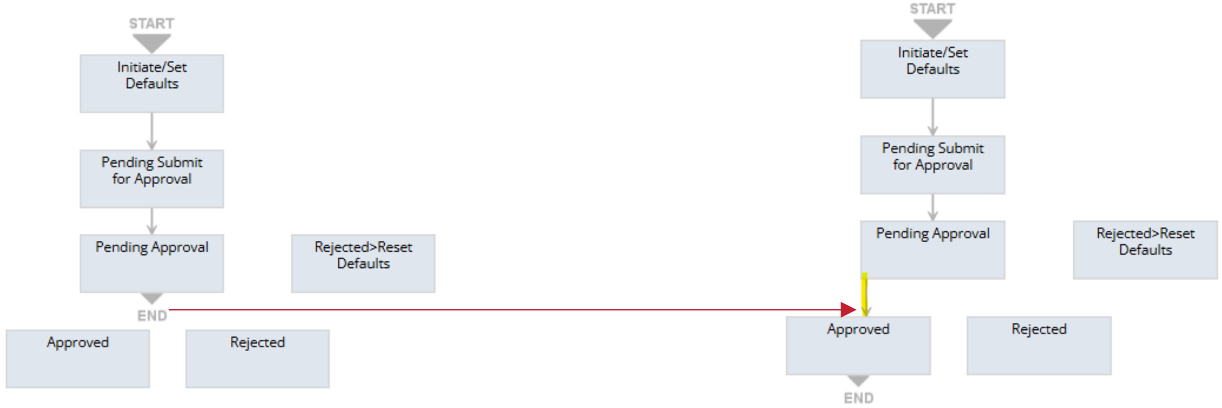
- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Now that we have added all our actions for the Pending Approval State, we can test to ensure the actions are working as expected
  - We can perform the following test with expected results. Enter a Vendor Bill and upon 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

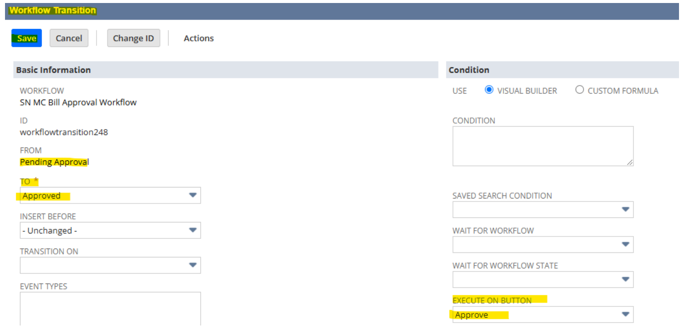


  - After Submit for Approval Button Clicked

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



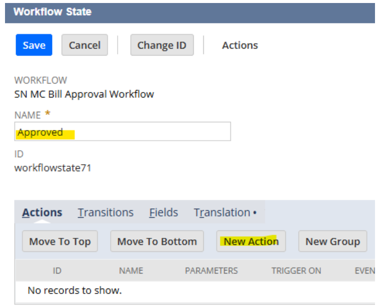


Approval Workflow

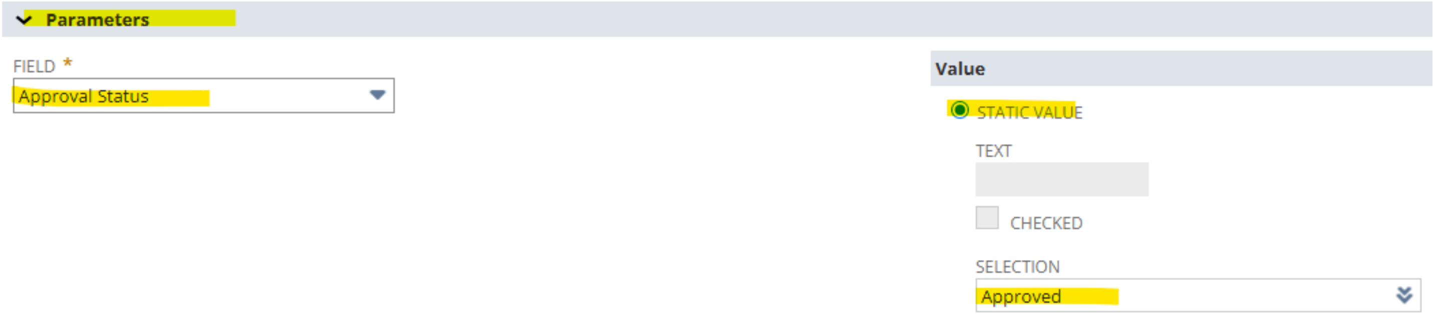
- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Now we can add our actions needed to the Approved State. We want to add the following:
    - Set Field Value – Native Approval Status to Approved when enters this state
    - Set Field Value – Custom Vendor Bill Approval 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

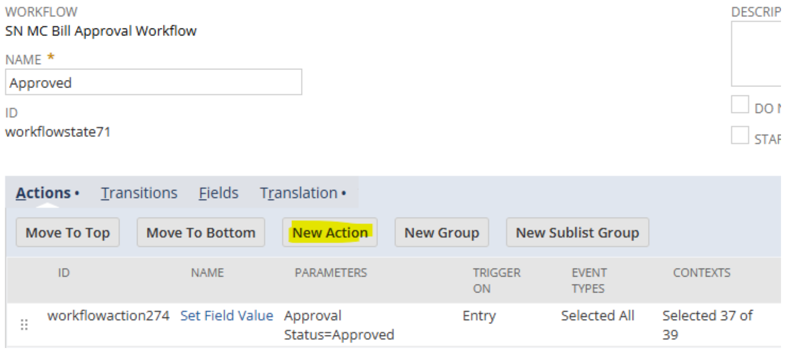


  - Trigger On Entry
  - Set Field Value

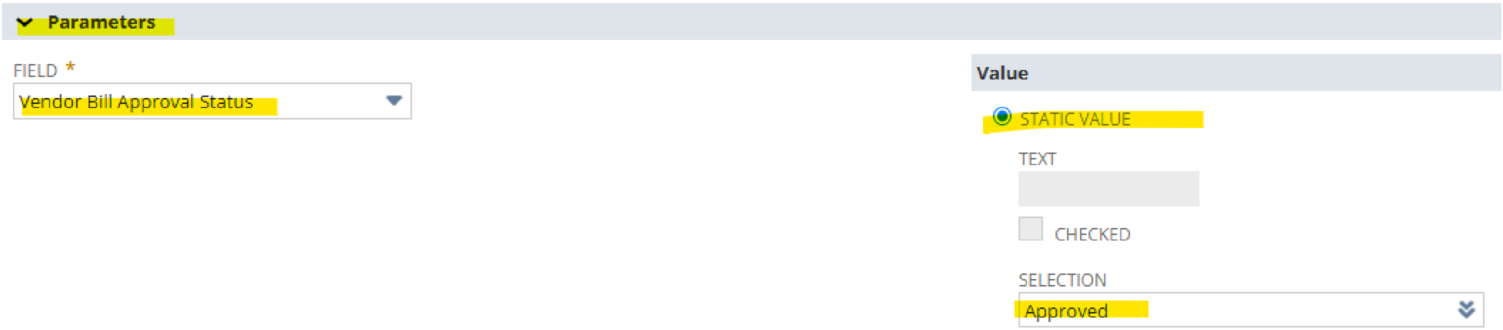


Approval Workflow

- 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

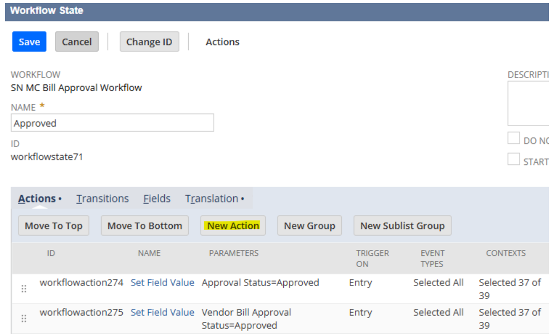


  - Trigger On Entry
  - Set Field Value

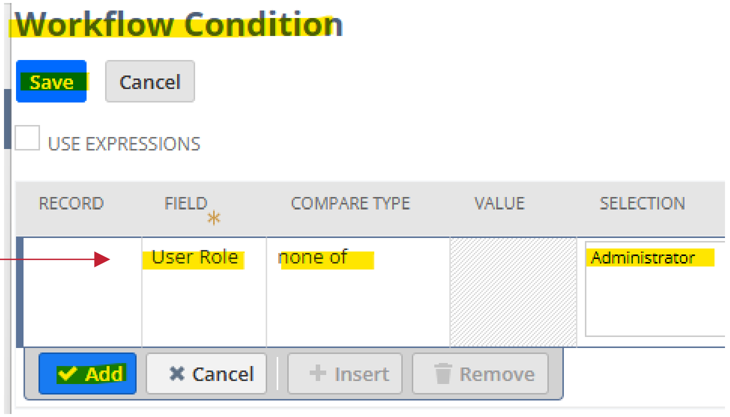


Approval Workflow

- 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



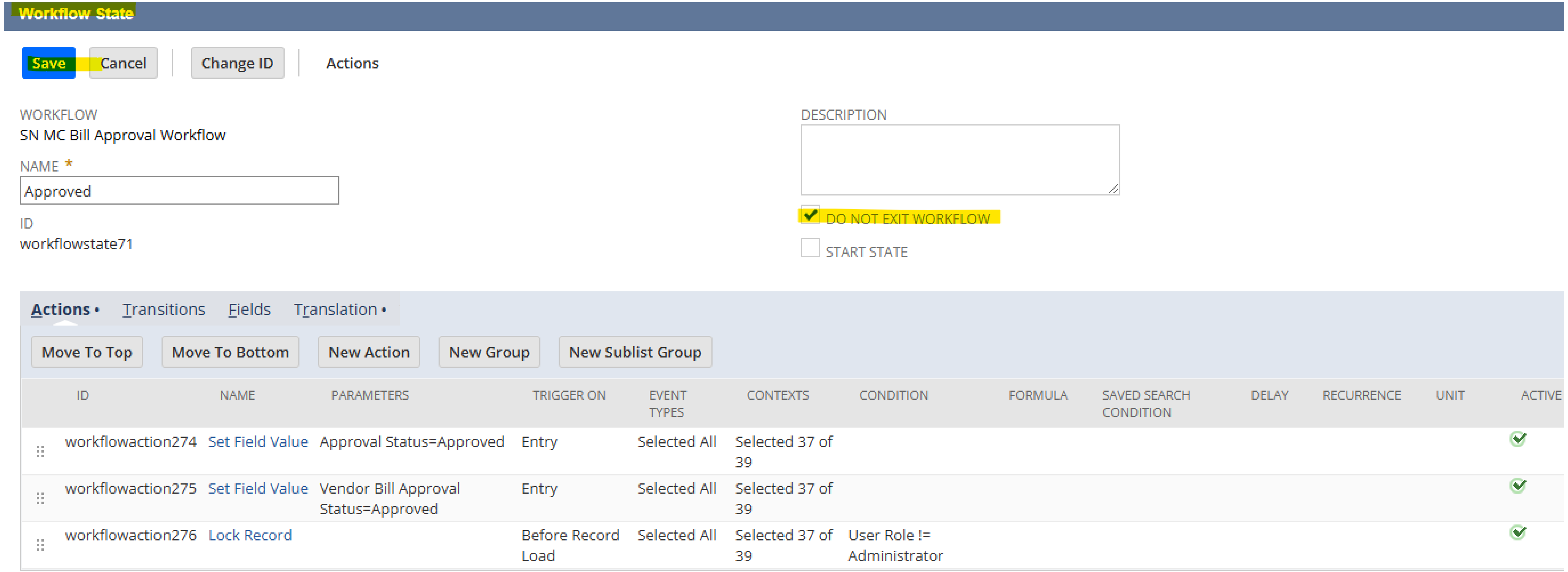
  - Lock Record
  - Trigger On Before Record Load
  - Condition



  | Version 1.0

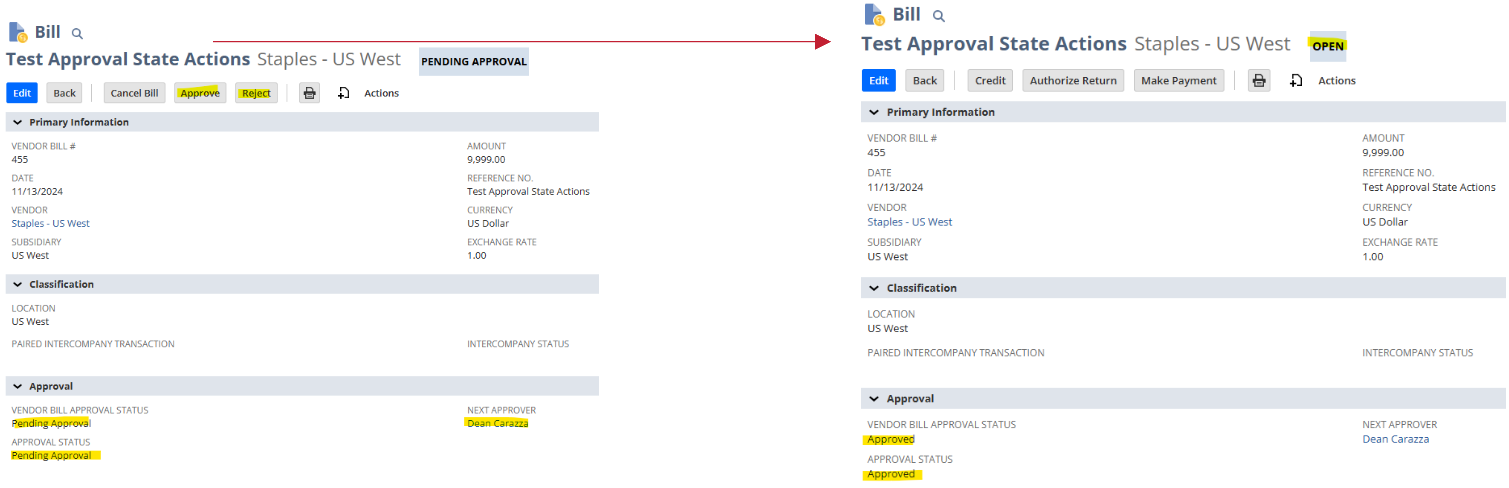
Approval Workflow

- 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.



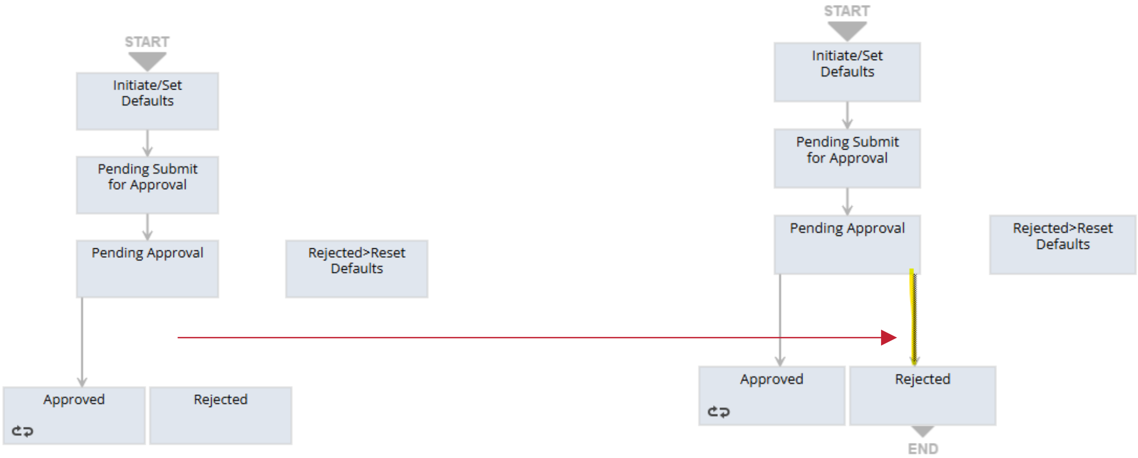
Approval Workflow

- 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 sate 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*

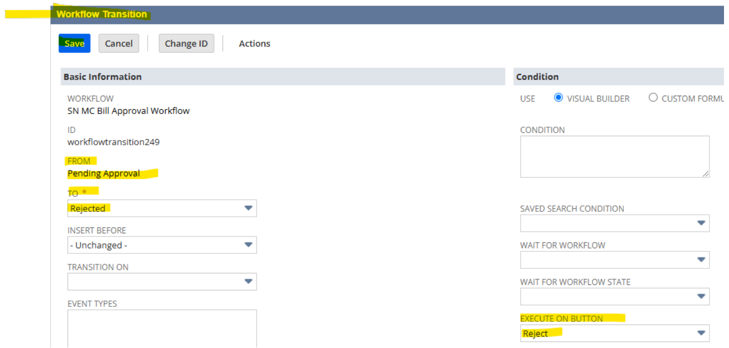


Approval Workflow

- 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.



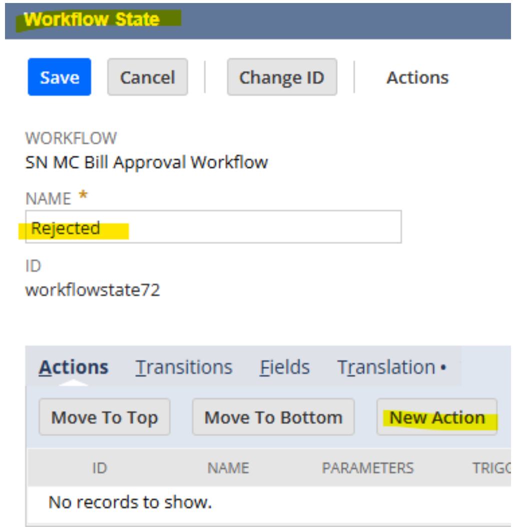
 | | Version 1.0

Approval Workflow

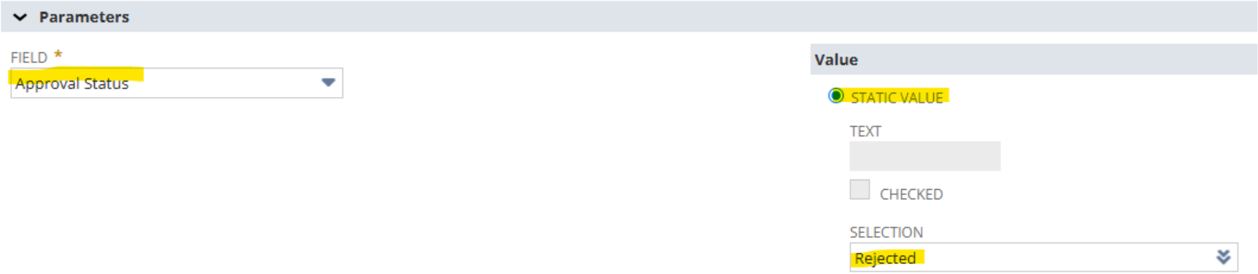
- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Now that we have added our transition from Pending Approval State to Rejected State, we can add our Rejection State Actions which are the following
    - Set Field Value – Native Approval Status to Rejected when enters 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

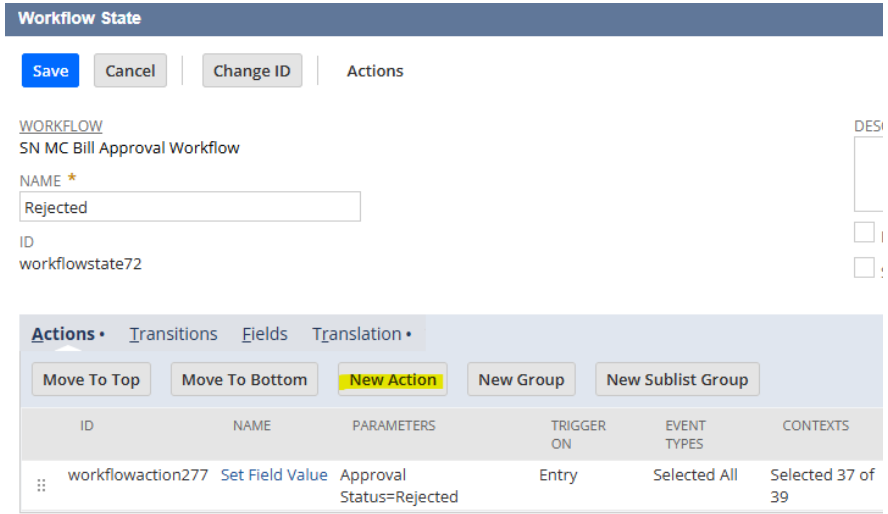


  - Trigger on Entry
  - Set Field Value

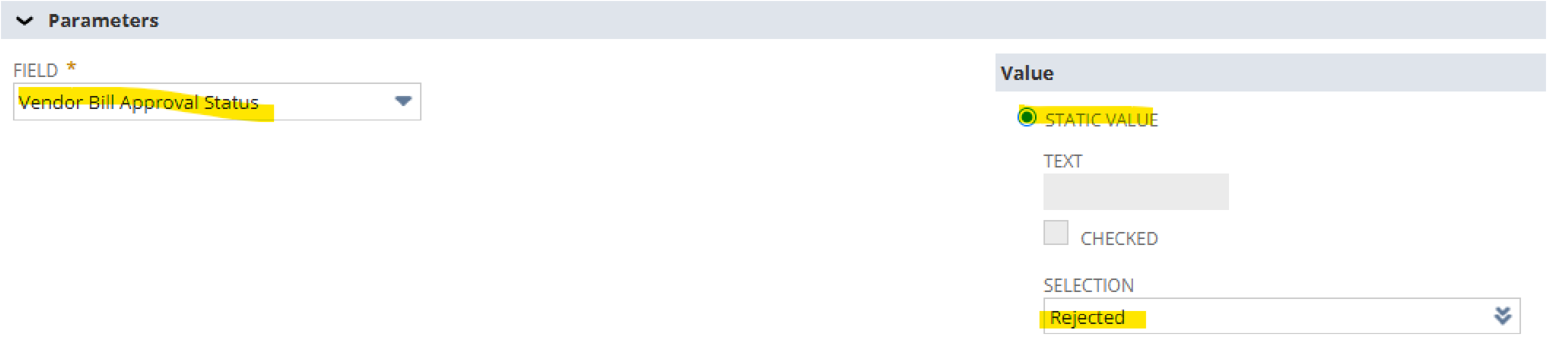


Approval Workflow

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

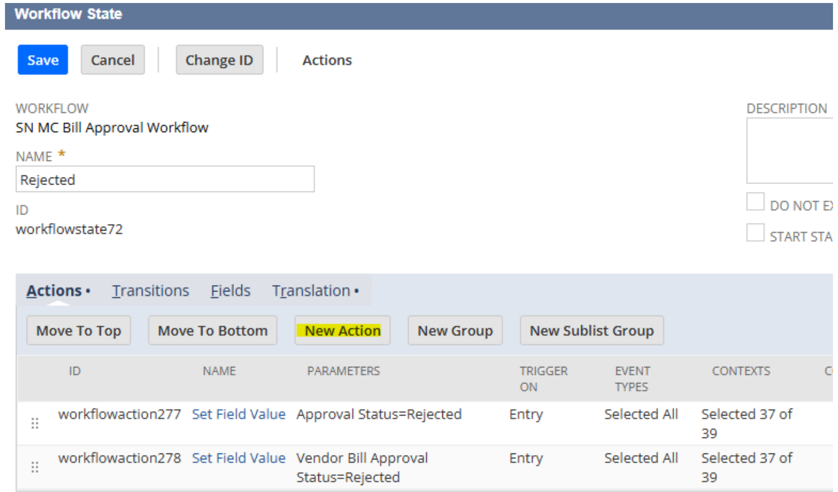


  - Trigger On Entry
  - Set Field Value

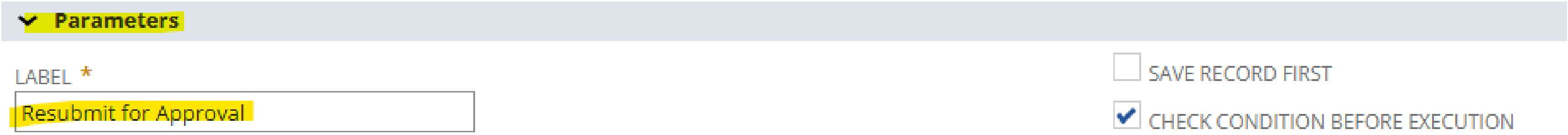


Approval Workflow

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



  - Trigger on Before Record Load
  - Add Button



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

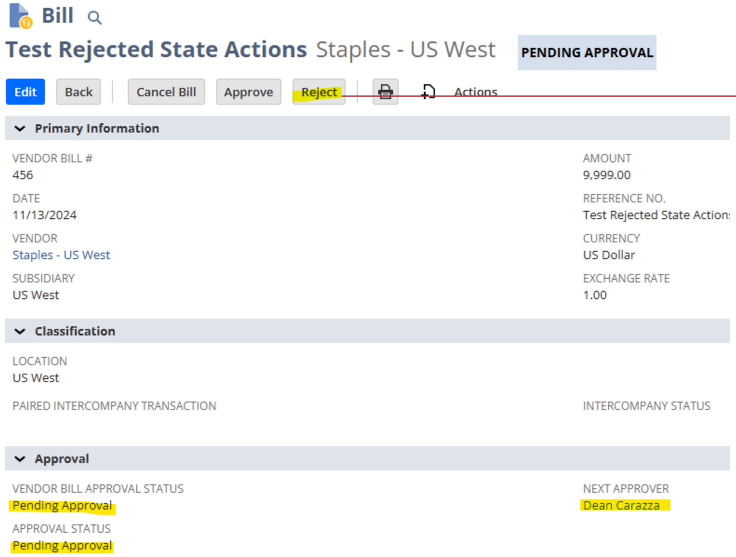
Actions • | Transitions | Fields | Translation •

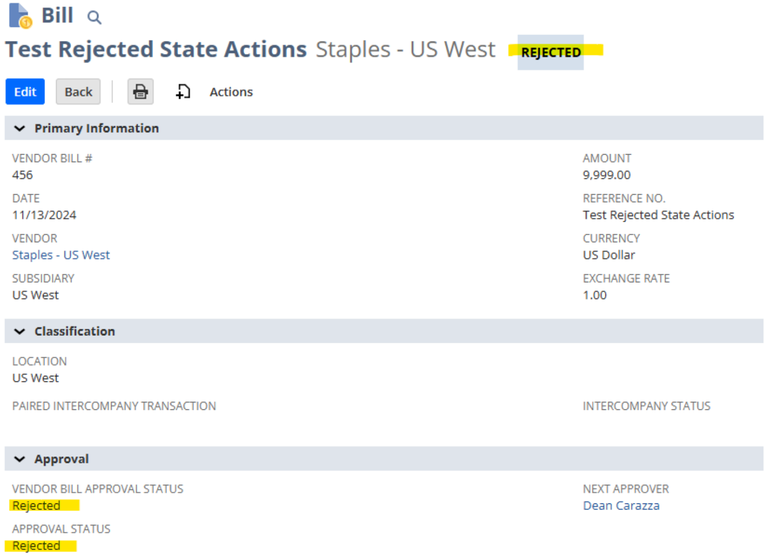
Move To Top | Move To Bottom | New Action | New Group | New Sublist Group

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*



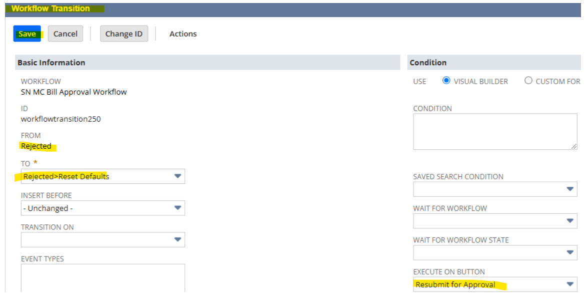


Approval Workflow

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



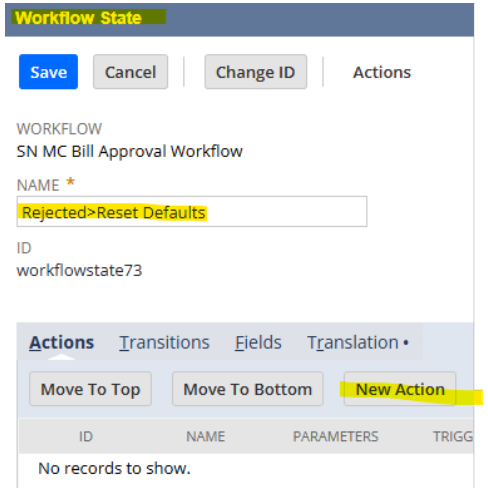
Approval Workflow

- Step 6 – Adding Actions and conditions to each state and transition - Continued
  - Now we are down to our last sate 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

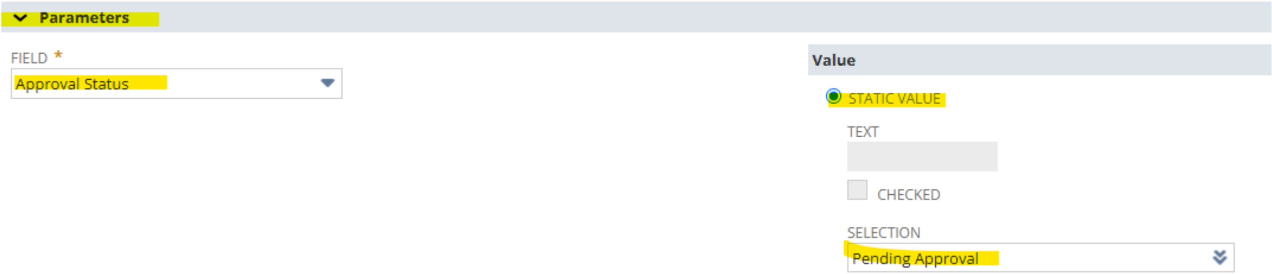
  - What follows is the steps/screen shots to add each of the actions above

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

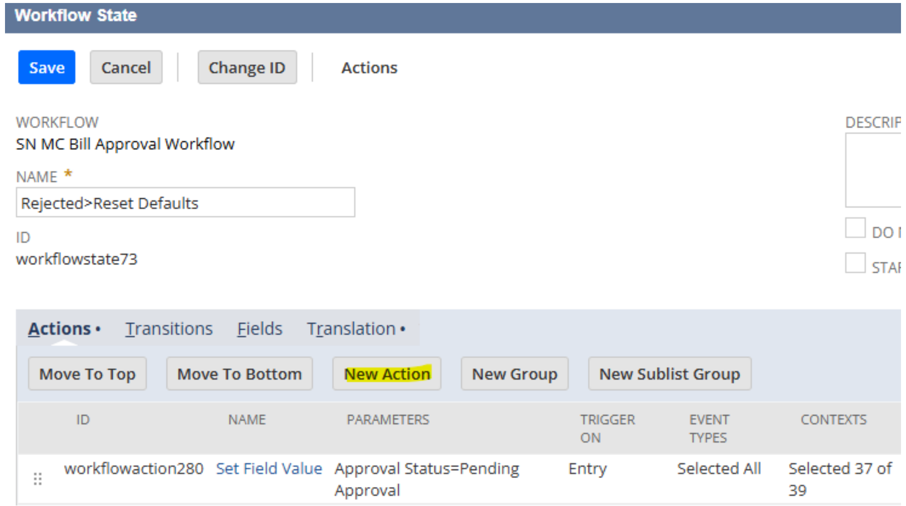


  - Trigger on Entry
  - Set Field Value

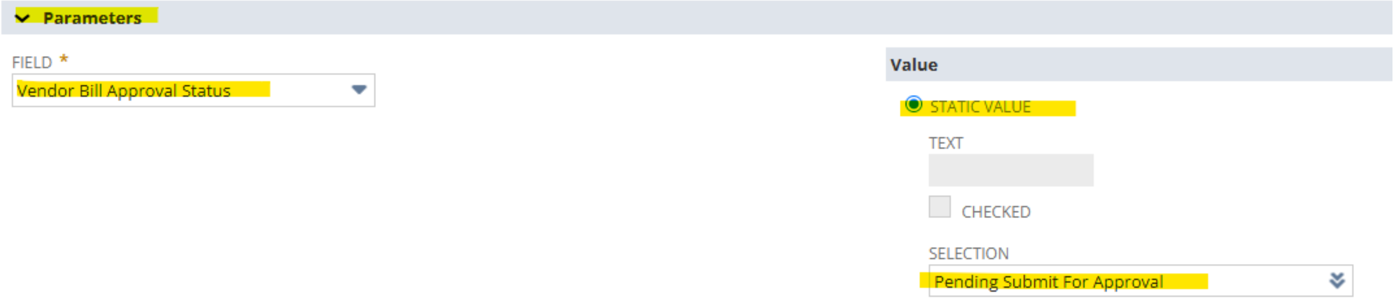


Approval Workflow

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

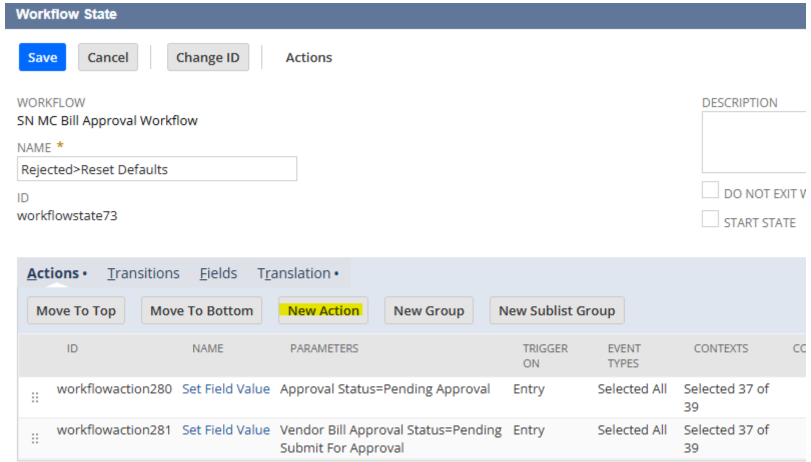


  - Trigger On Entry
  - Set Field Value

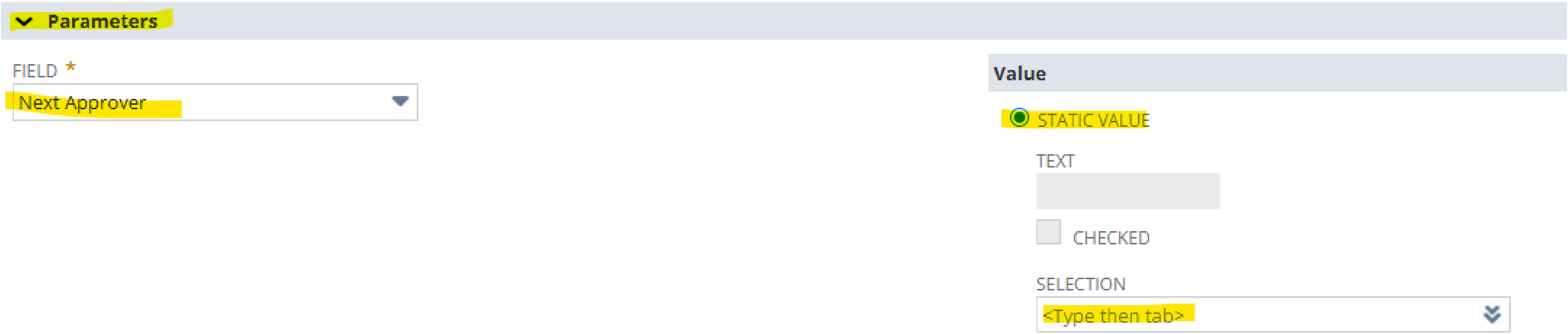


Approval Workflow

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



  - Trigger on Entry
  - Set Field Value



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 *
Rejected>Reset Defaults

ID
workflowstate73

DESCRIPTION

☐ DO NOT EXIT WORKFLOW

☐ START STATE

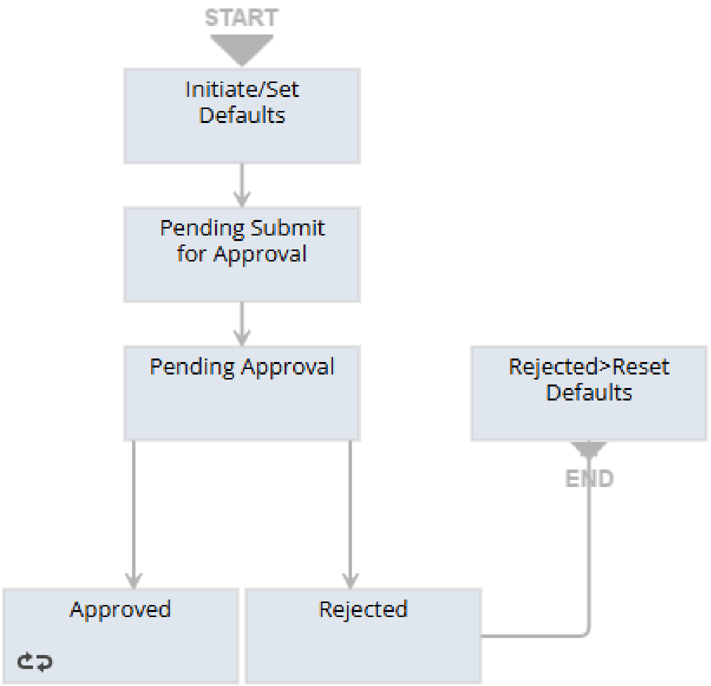
Actions • | Transitions | Fields | Translation •

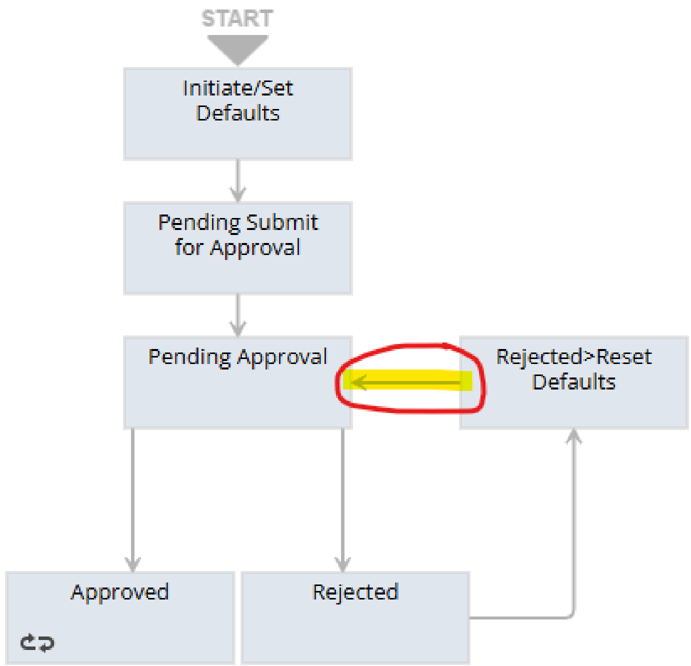
Move To Top | Move To Bottom | New Action | New Group | New Sublist Group

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



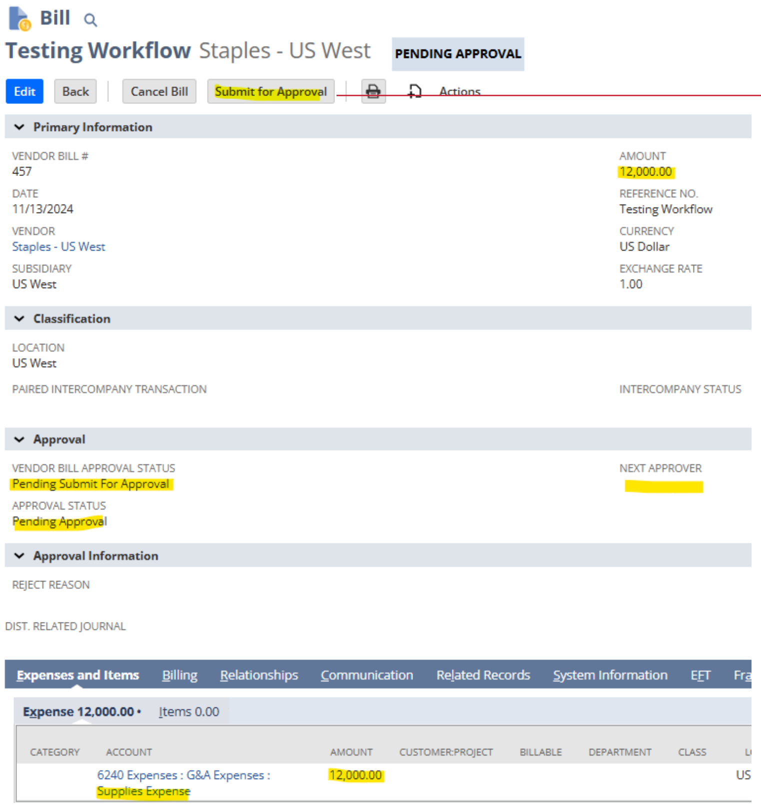


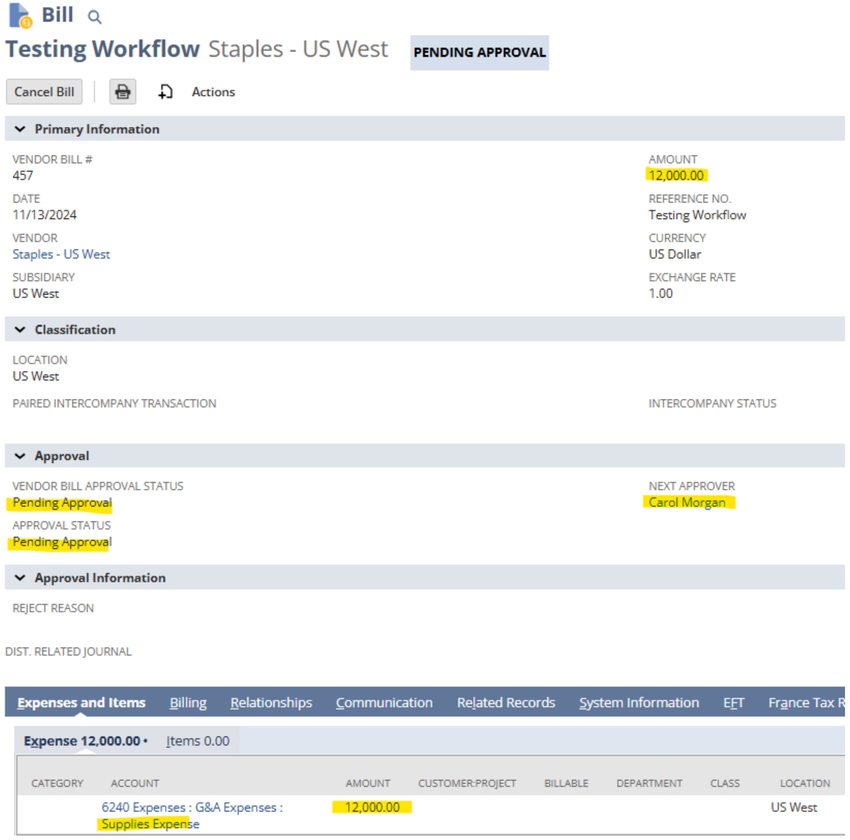
Approval Workflow

- 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

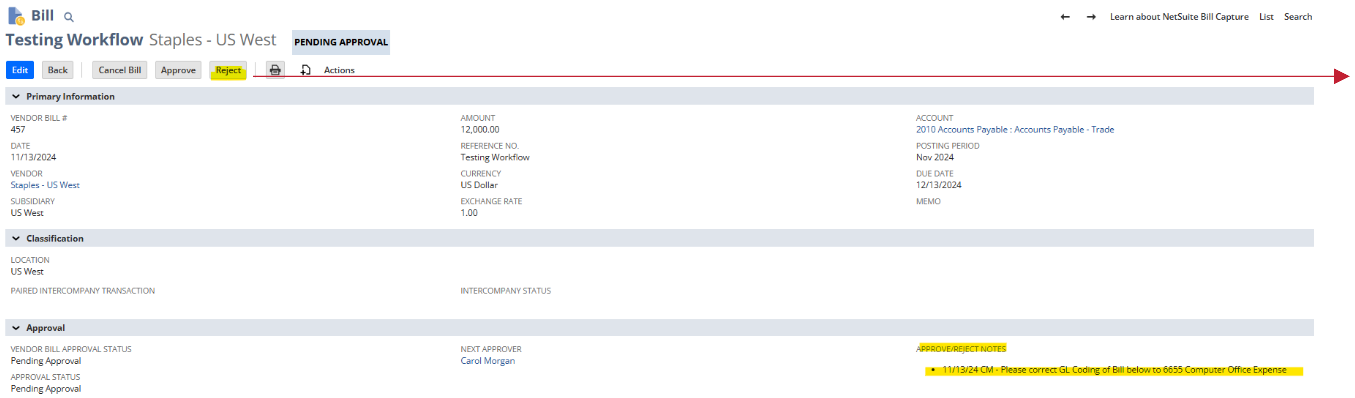


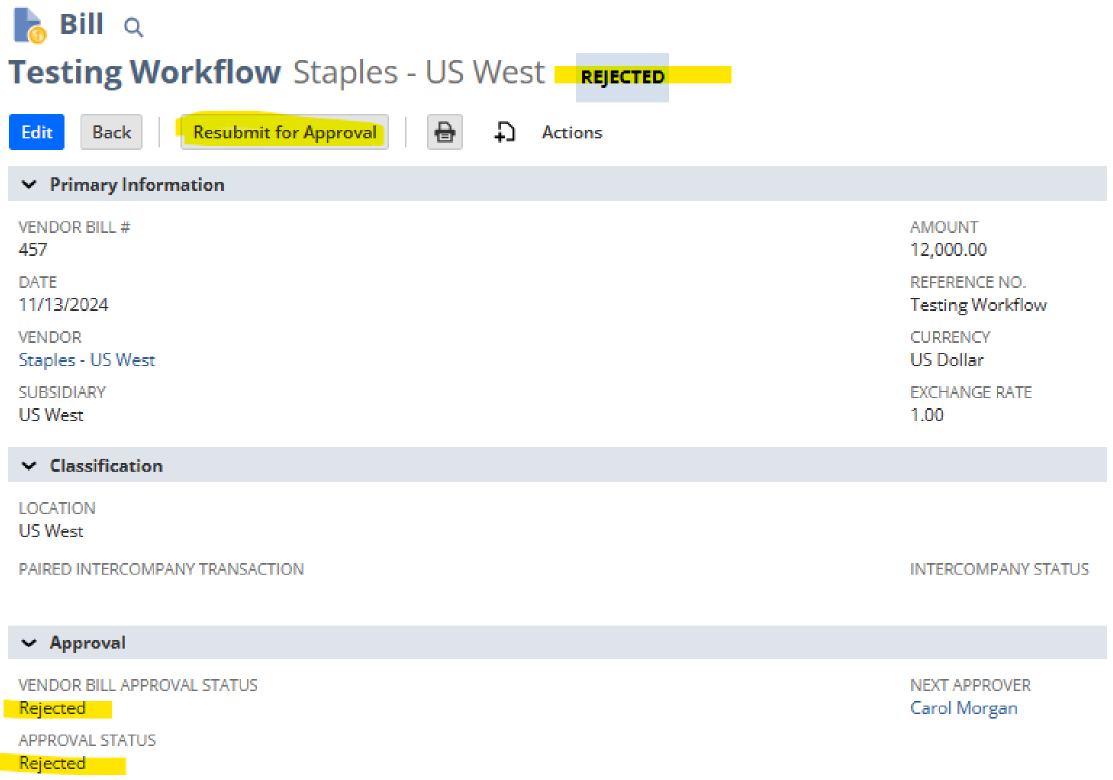


Approval Workflow

- Step 7 – Testing the Workflow – Continued

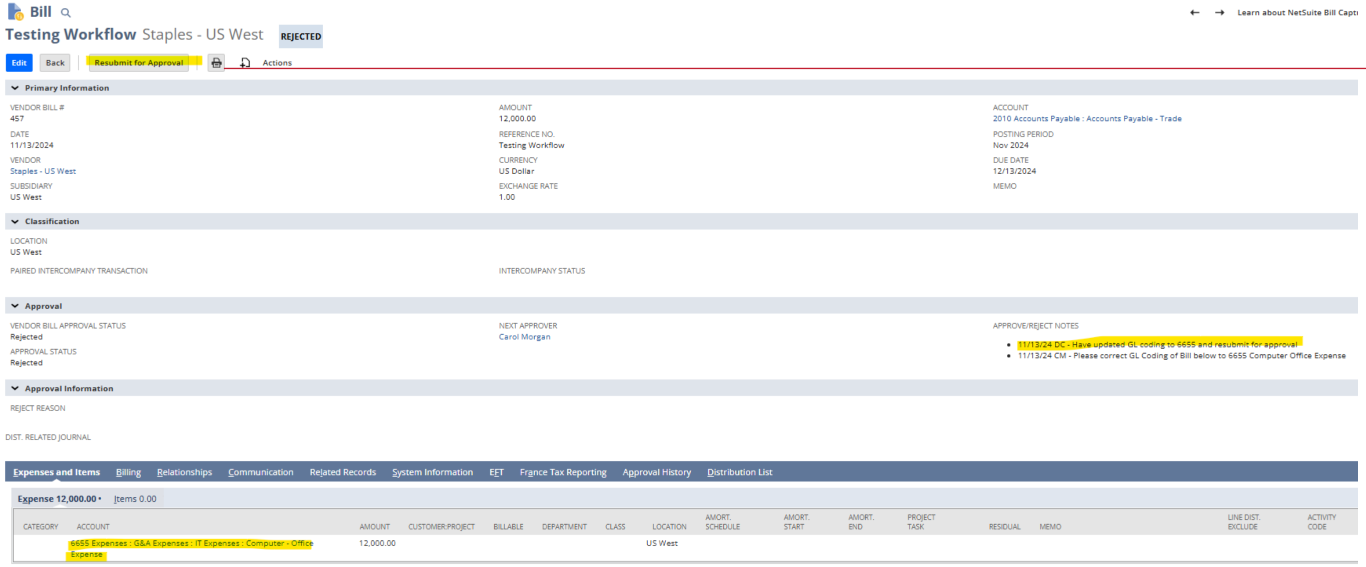
  2. Reject the Bill and leave a comment that bill should be entered to Computer Equipment Office Expense not Supplies expense
     - Native Approval Status should become Rejected
     - Custom Vendor Bill Approval Status should become Rejected
     - Resubmit for Approval button should be showing

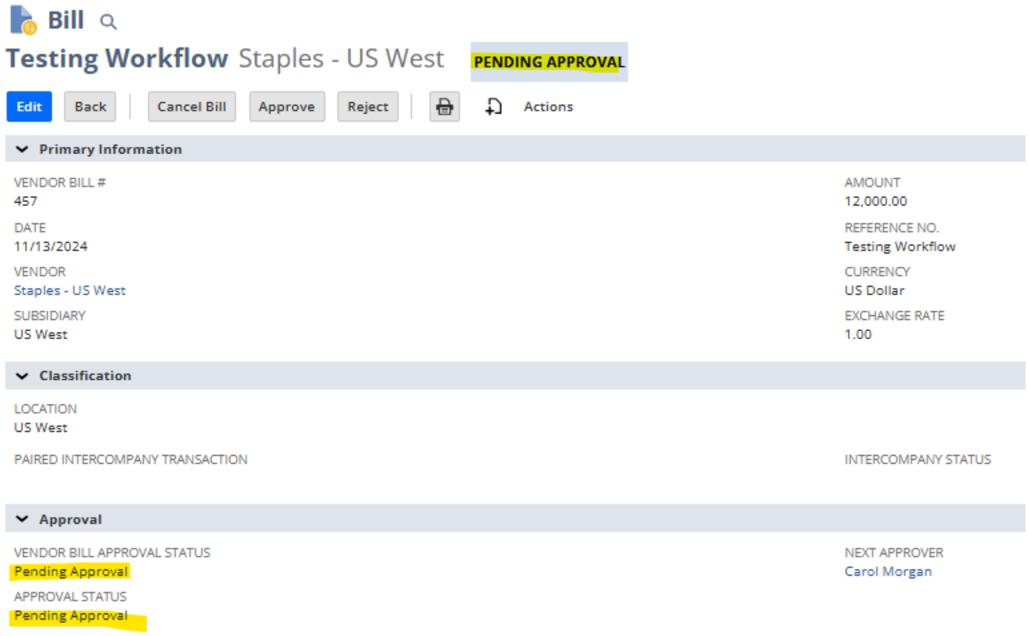




Approval Workflow

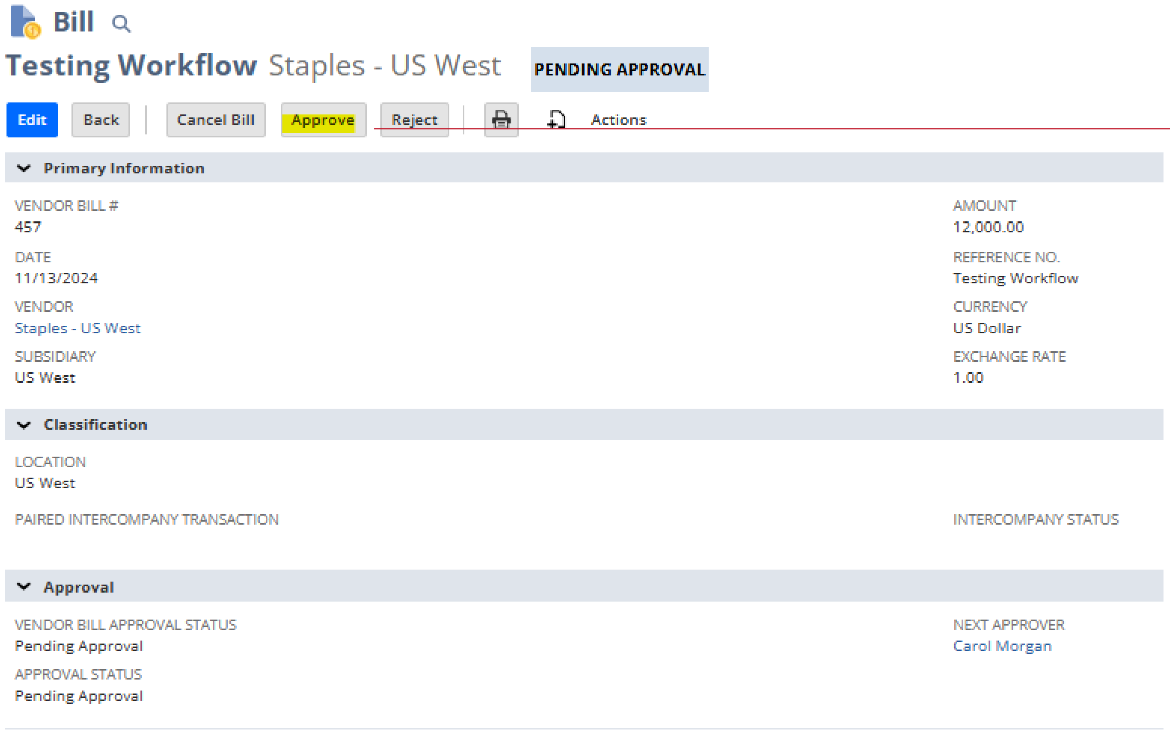
- Step 7 – Testing the Workflow - Continued
  3. Edit the Bill and change to the correct GL account and Resubmit for Approval
     - Native Approval Status should change back to Pending Approval
     - Custom Vendor Bill Approval Status should change back to Pending Approval

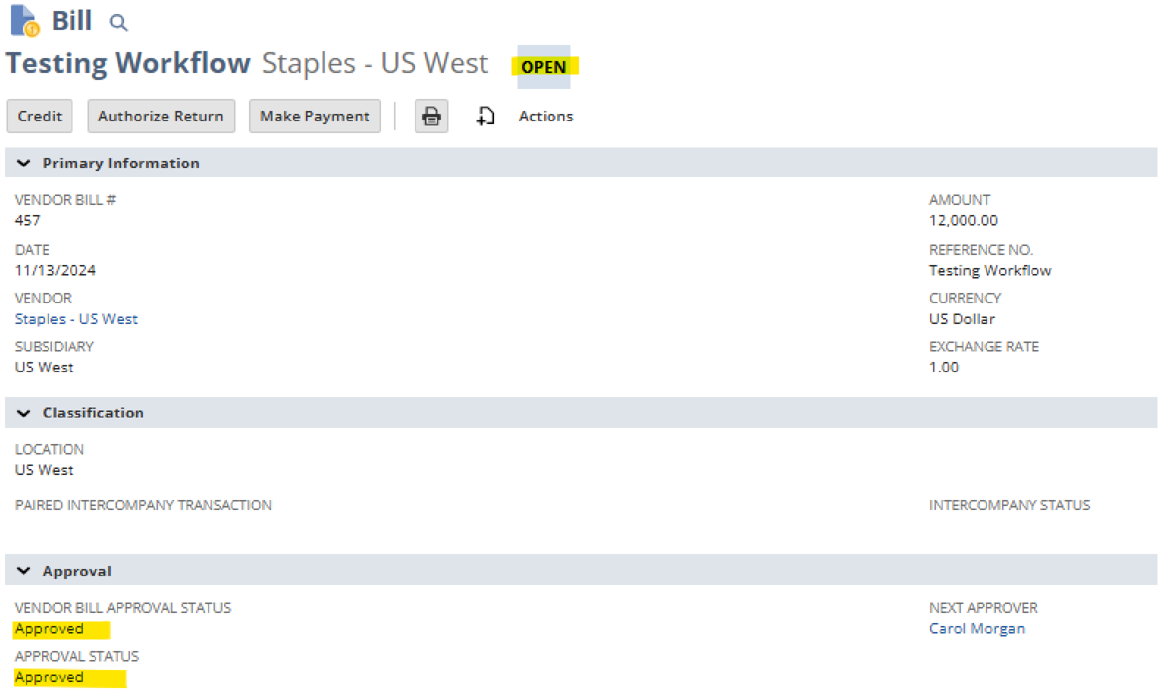




Approval Workflow

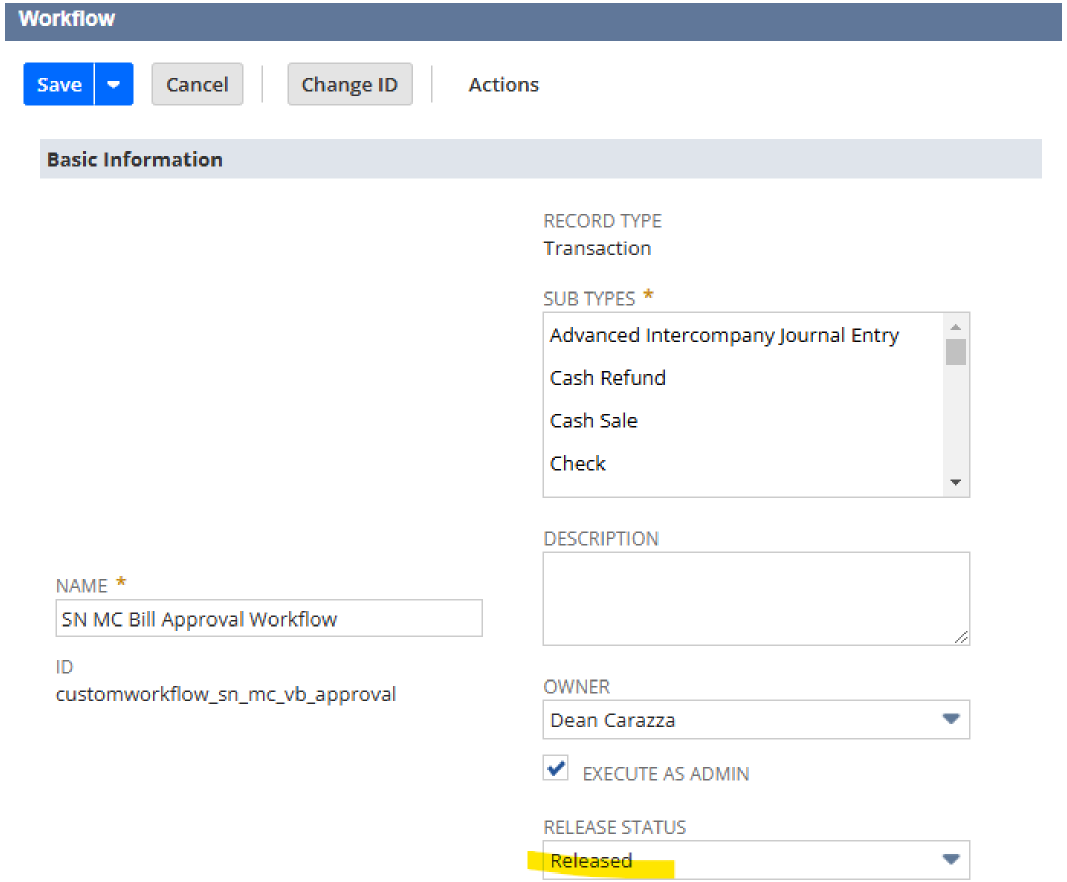
- Step 7 – Testing the Workflow - Continued
  4. Approve the Bill
     - Native Approval Status should become Approved
     - Custom Vendor Bill Approval Status should become Approved
     - Vendor Bill should be locked in all roles except administrator (no Edit Button)





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



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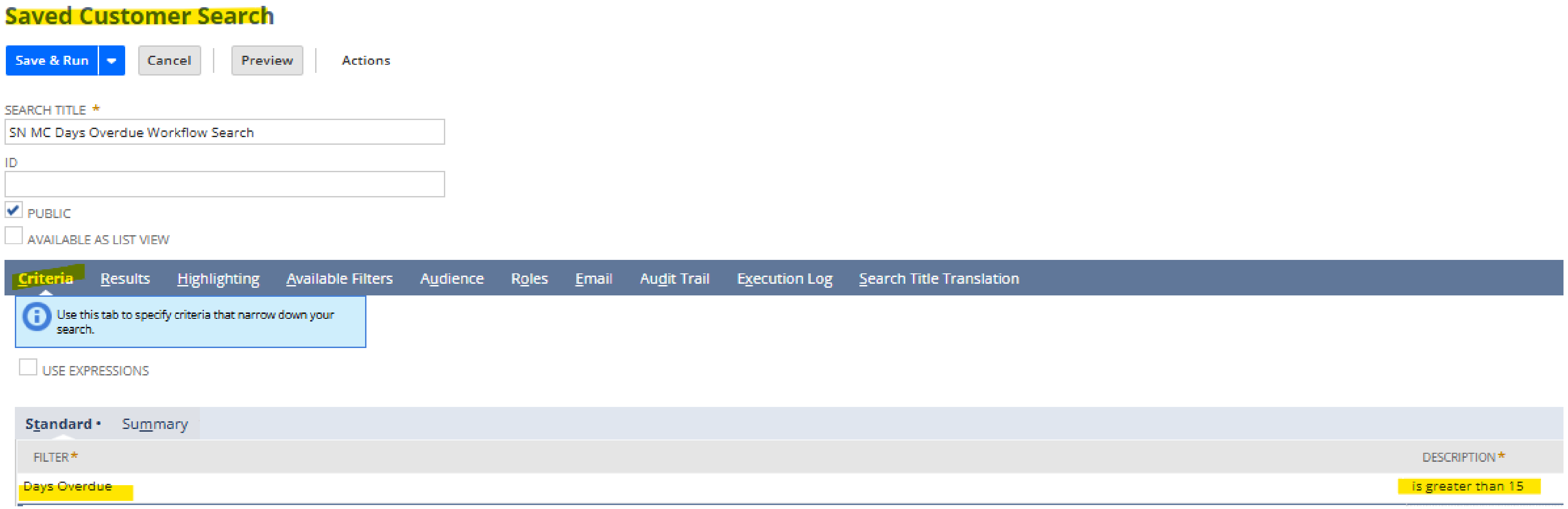
Send Email Workflow

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

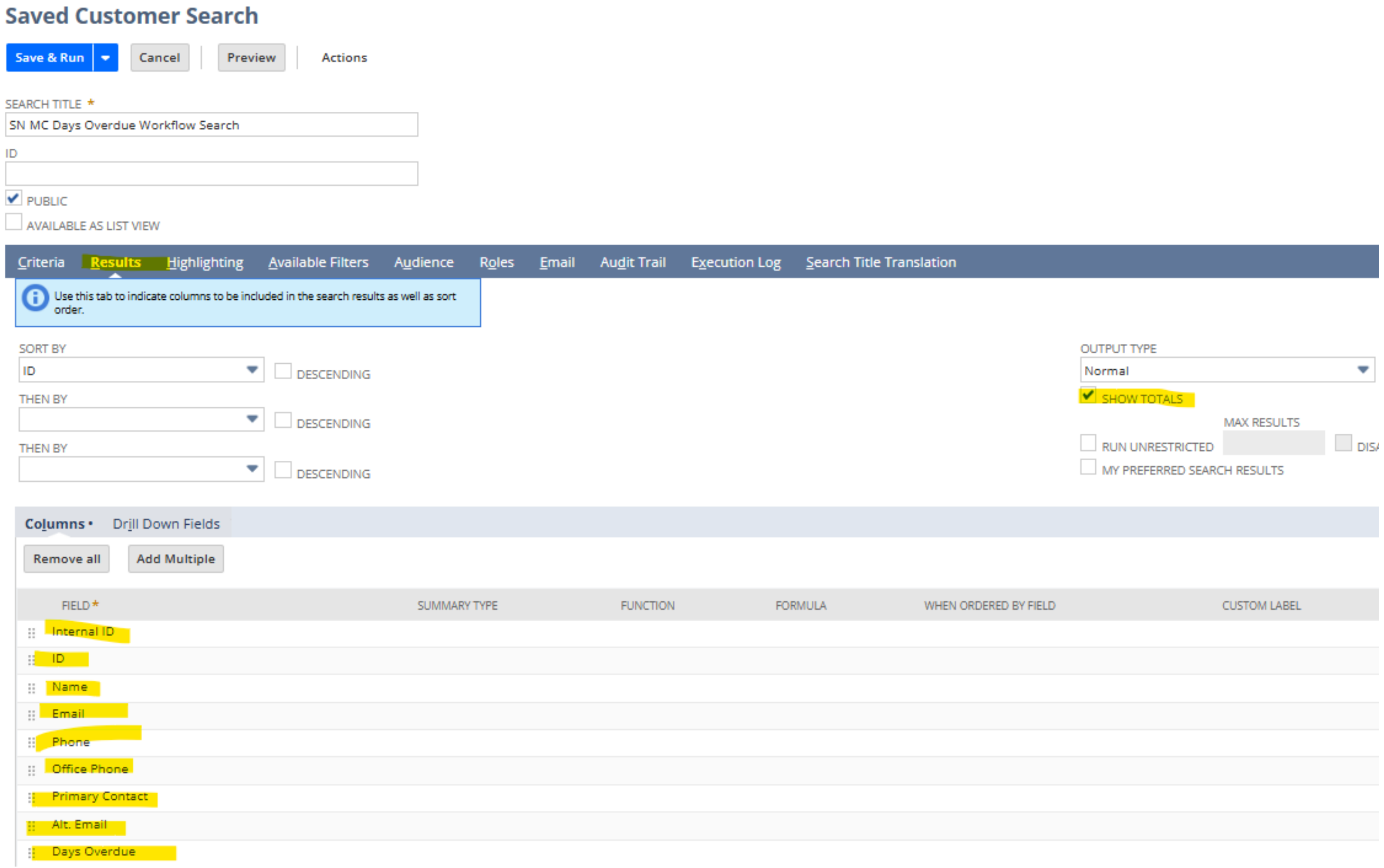
Send Email Workflow

- 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



Send Email Workflow

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



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

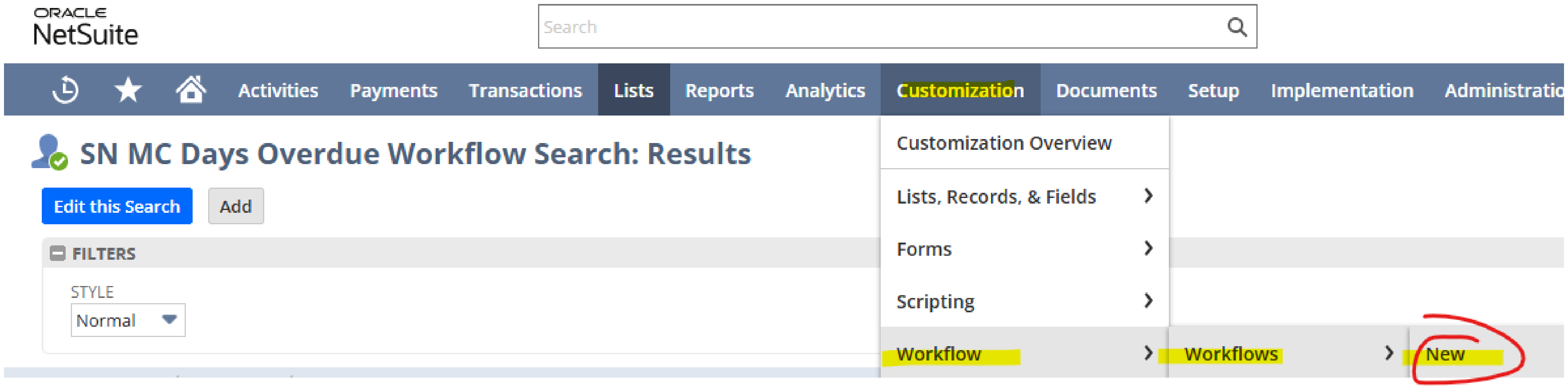
EDIT

TOTAL: 5

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	The Altima Technology	info@thealtimatechnology.com	(805) 485-6750		Kelli Dean		44
				Total							**391**

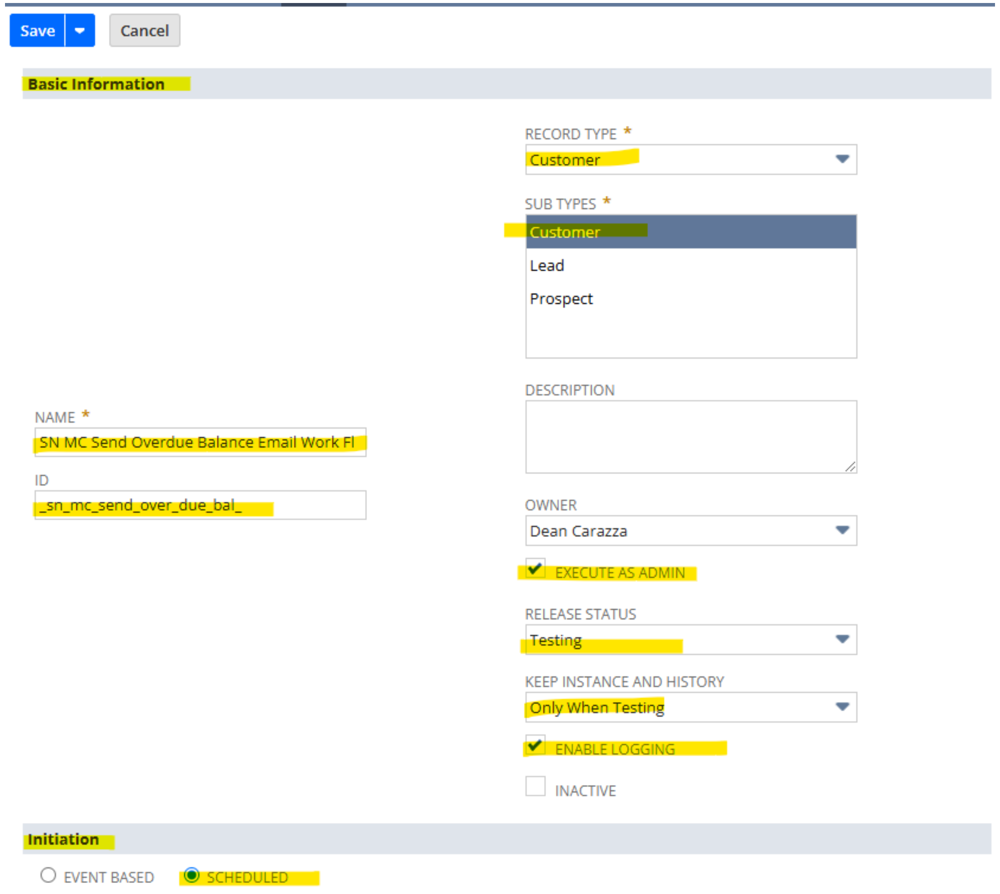
Send Email Workflow

- 2. Create Workflow
  - Navigate to Customization>Workflow>Workflows>New



Send Email Workflow

- 2. Create Workflow
  - Fill out the following Basic Information and initiation



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

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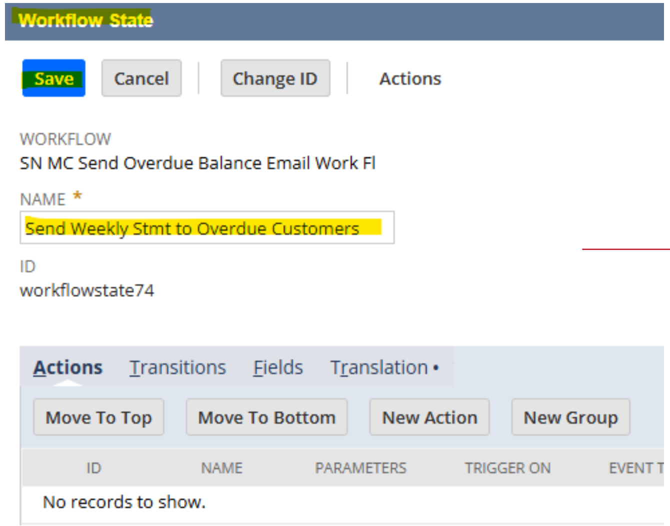
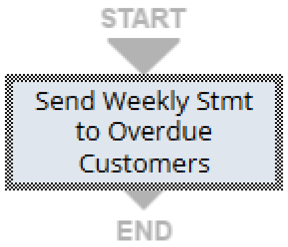
Send Email Workflow

- 2. Create Workflow
  - Now we have our blank workflow

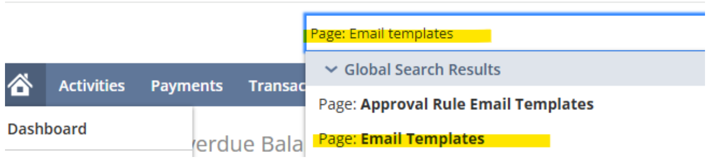
  - We can edit/rename state 1 to Send Weekly Stmt to Overdue Customers
    - While the workflow is in edit not view mode, double click on state 1 and rename it



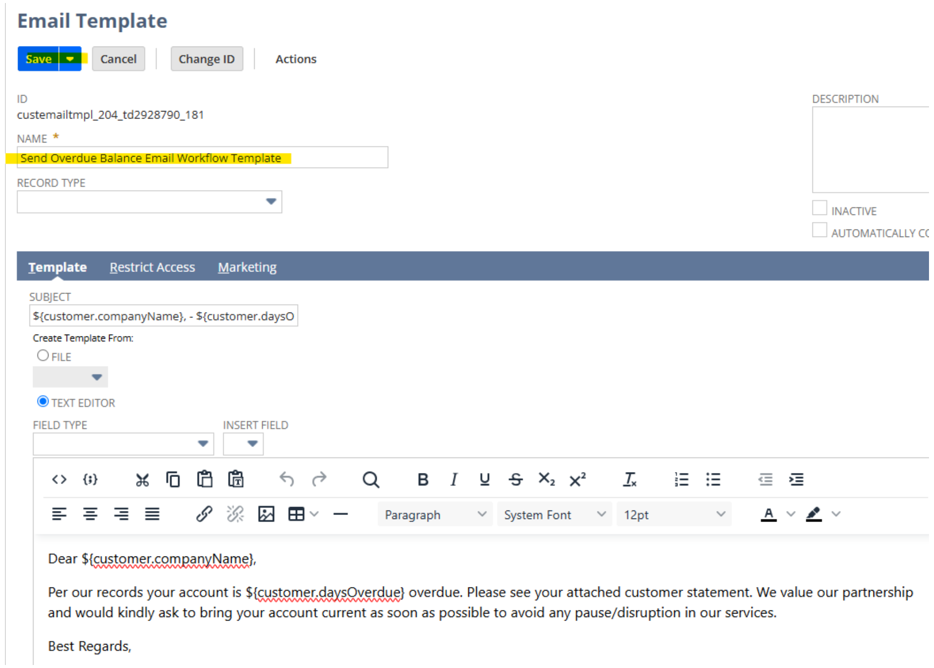


Send Email Workflow

- 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

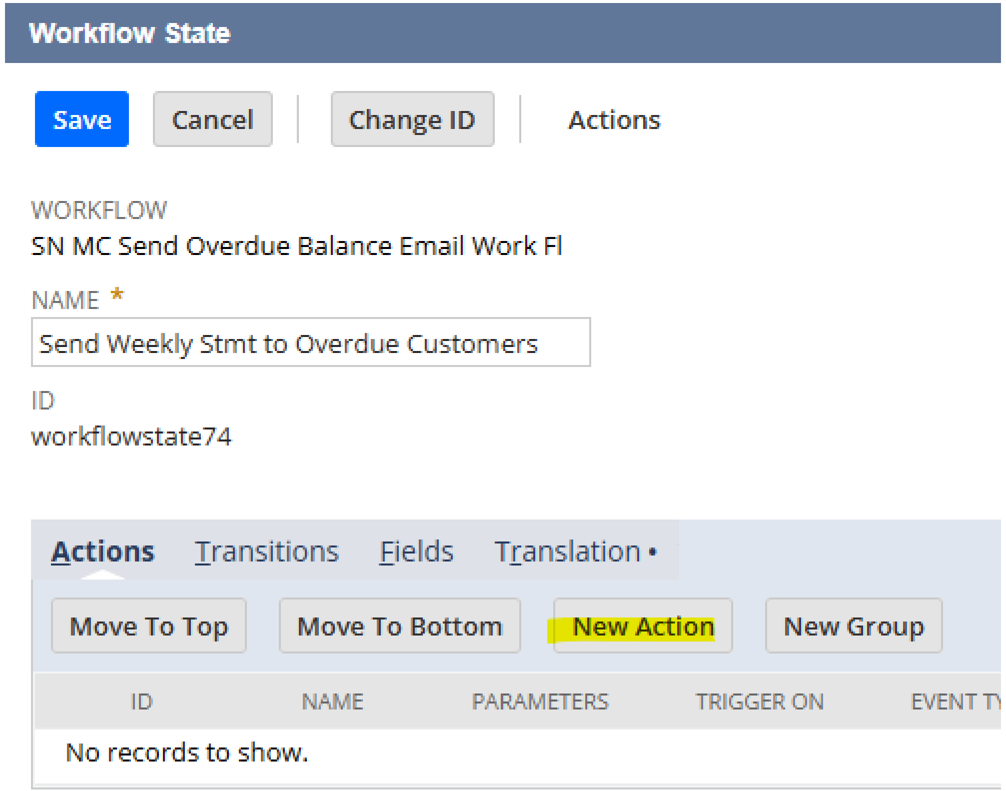


  - Click New – created a simple email template that can use



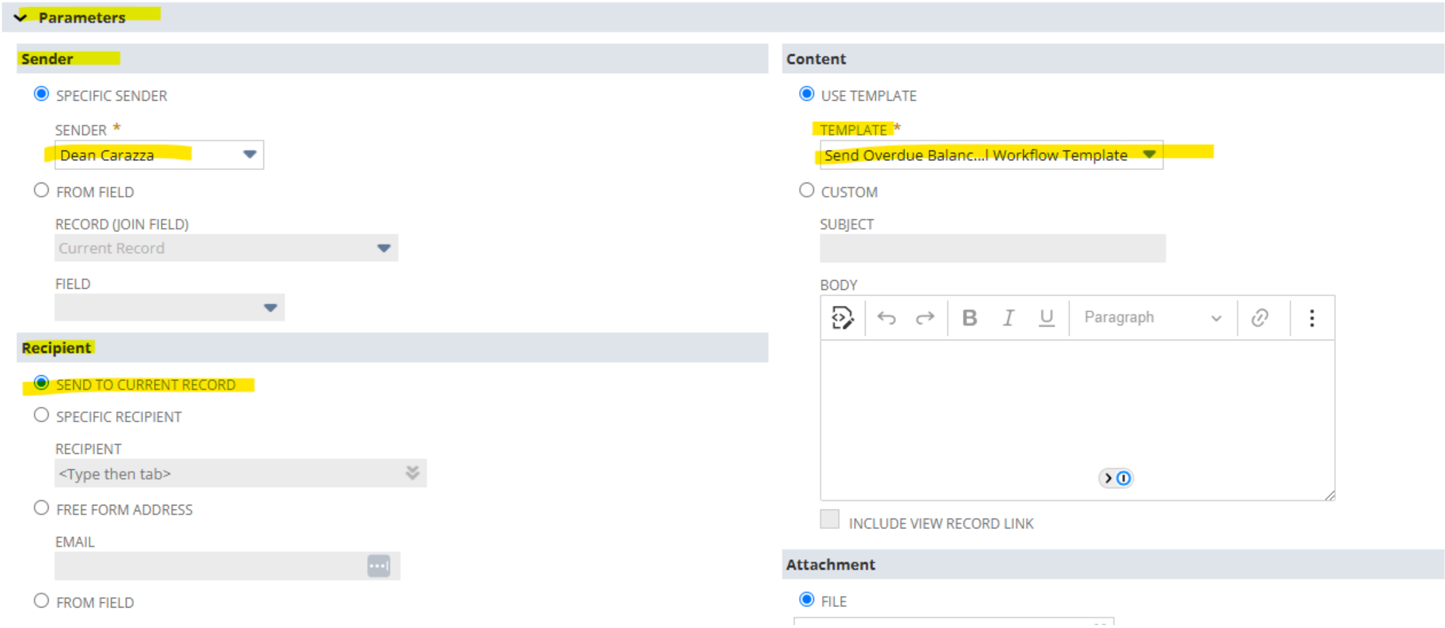
Send Email Workflow

- 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



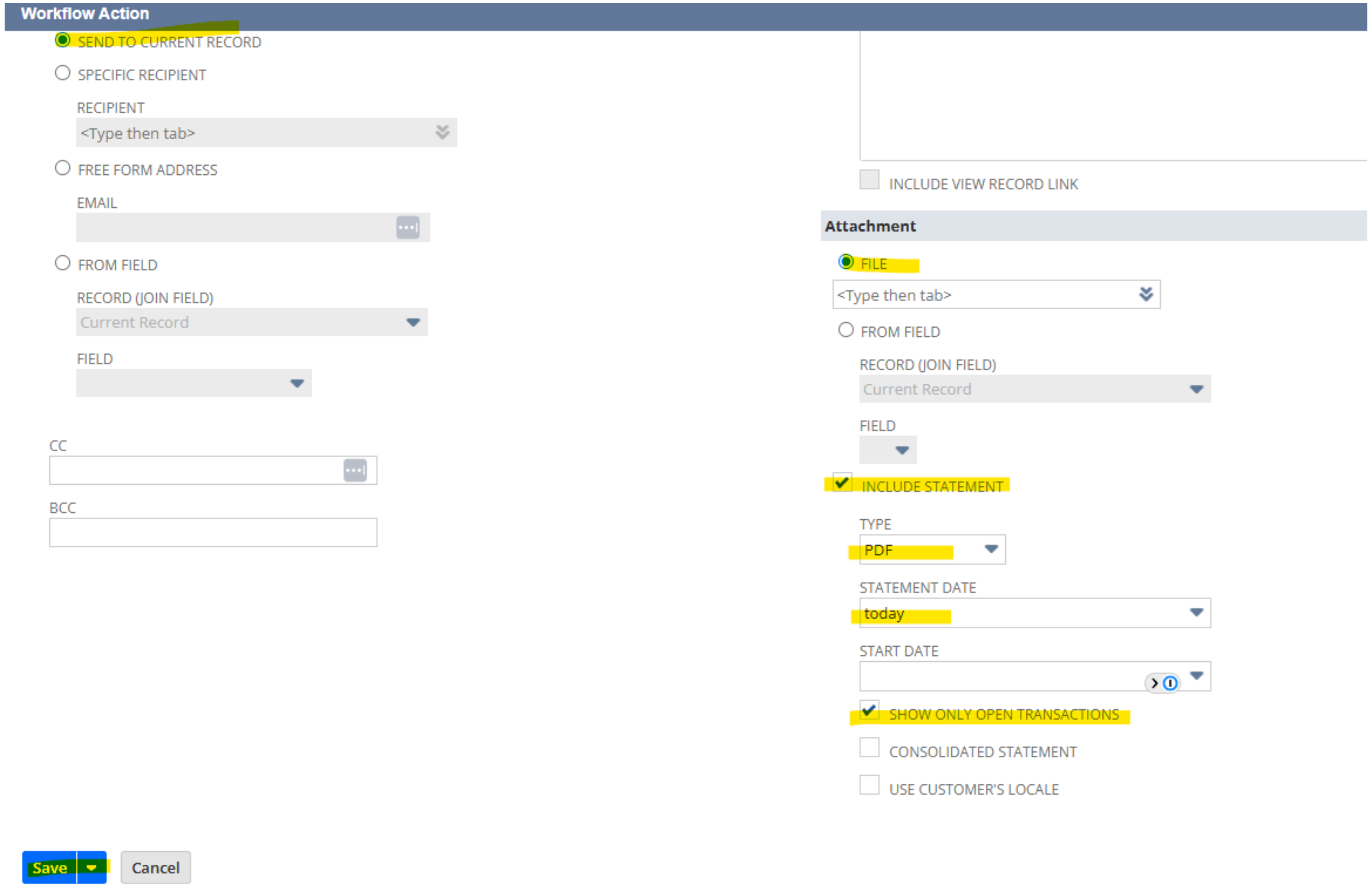
Send Email Workflow

- 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



Send Email Workflow

- 2. Create Workflow



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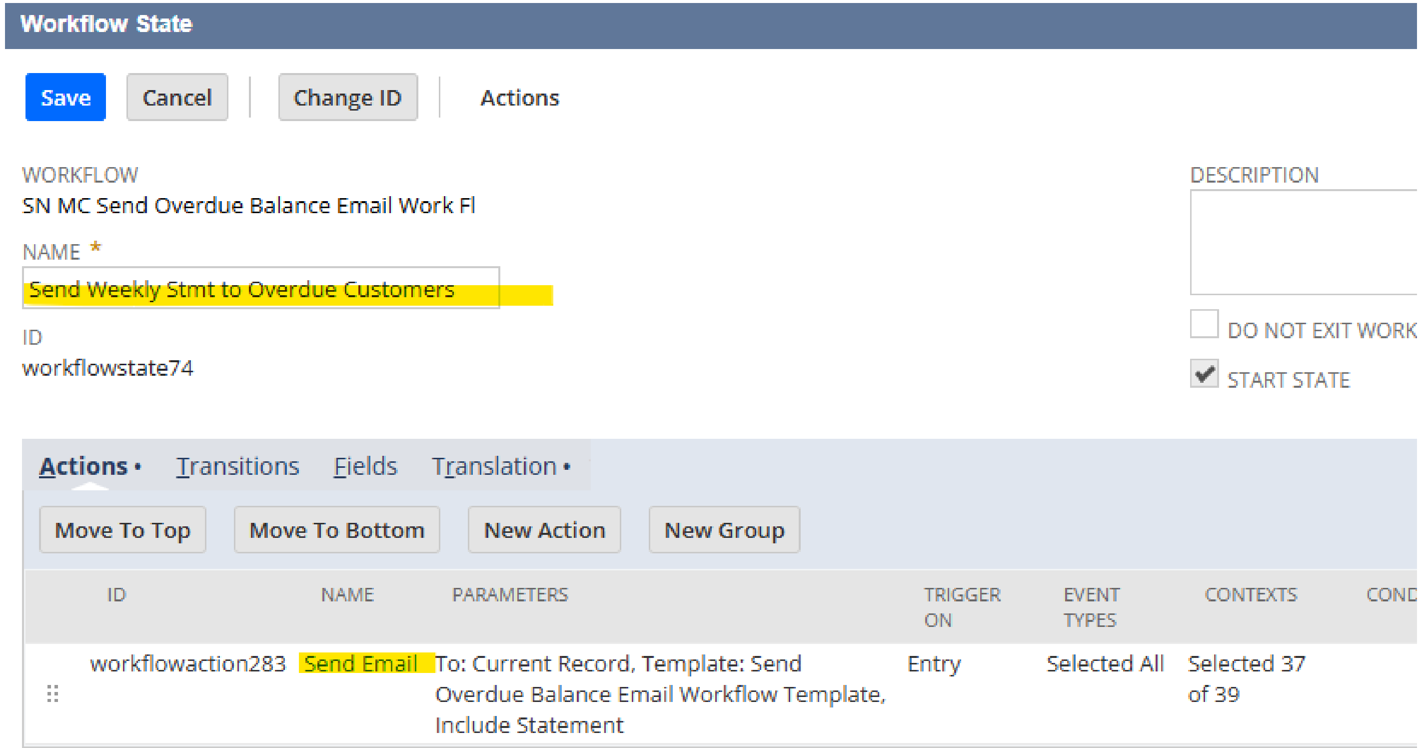
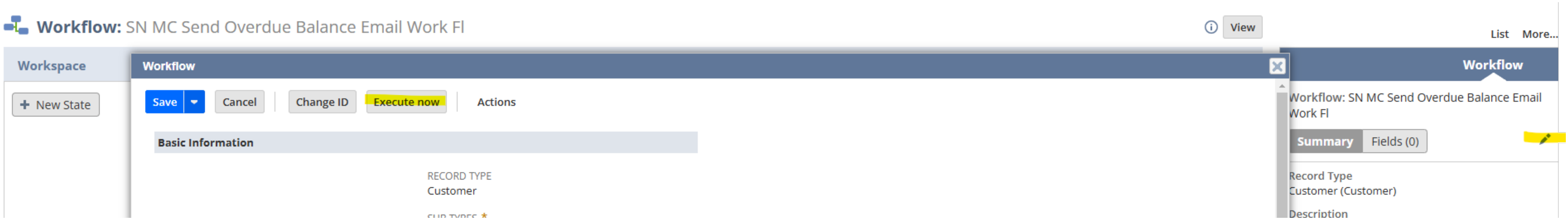
Send Email Workflow

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

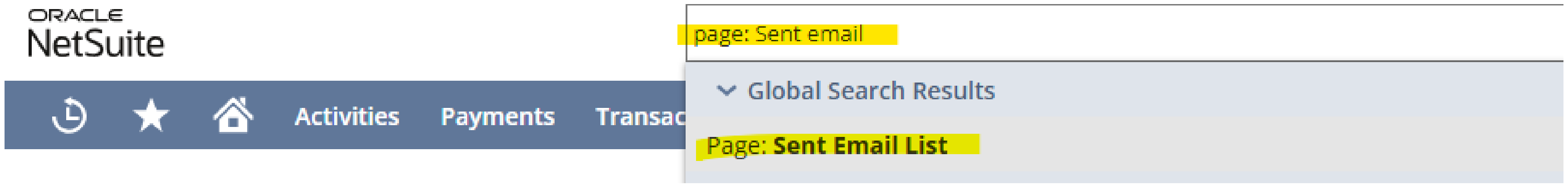


Send Email Workflow

- 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	BC
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

TYPE
Company

COMPANY NAME
Copper Software

SUBSIDIARY
US West

STATUS
CUSTOMER-Closed Won

REPRESENTS SUBSIDIARY

SALES REP
Will Clark

LEAD SOURCE
Web

LAST MODIFIED DATE
11/17/2024

TRANSACTIONS NEED API

Email | Phone | Address

PHONE
(619) 680-0662

INDUSTRY

NO. OF EMPLOYEES

EMAIL
info@coppersoftware.com

ANNUAL REVENUE

EMAIL ADDRESS FOR PAYMENT NOTIFICATION

LAST SALES ACTIVITY

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

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,

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

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Dynamically Set Required Fields Via Workflow

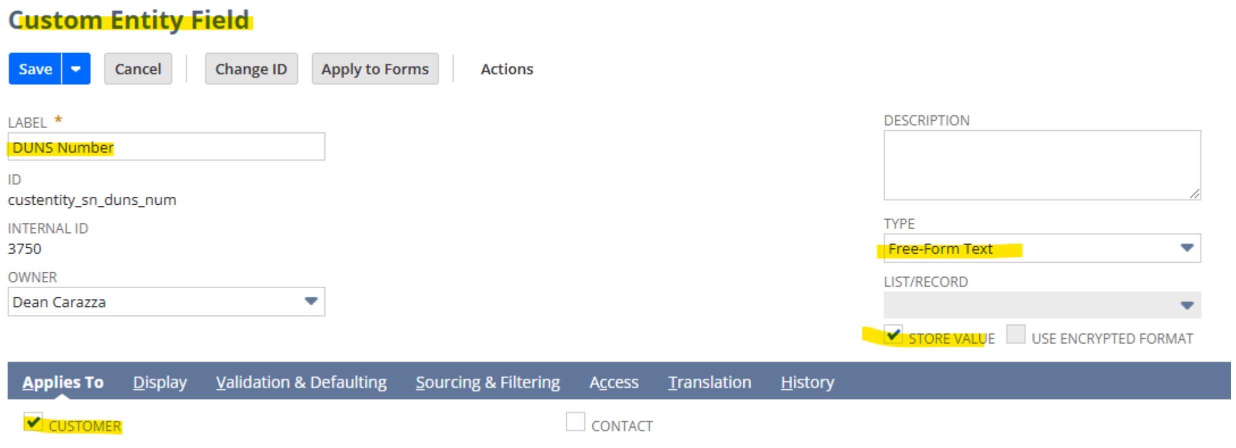
Dynamically Set Required Fields Workflow

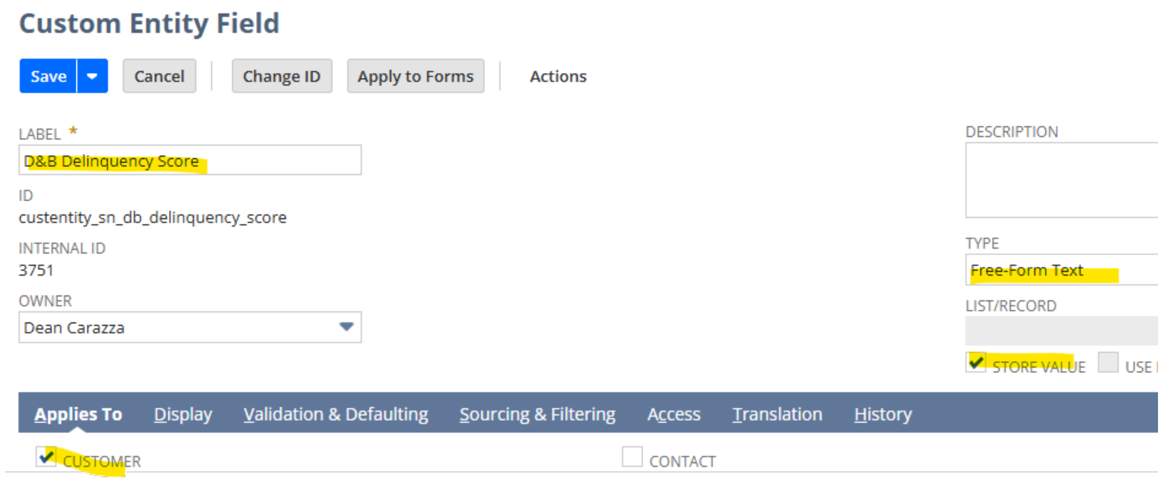
- Use Case
  - In this example, the business process is that all customers who are extended credit terms should have their DUNS or D&B Number and Delinquency Score logged on the customer record. Therefore, to help with compliance and to ensure this accurate information in the credit process is captured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

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

Dynamically Set Required Fields Workflow

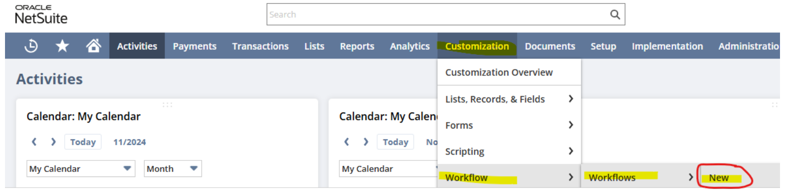
- 1. Create the Fields Needed



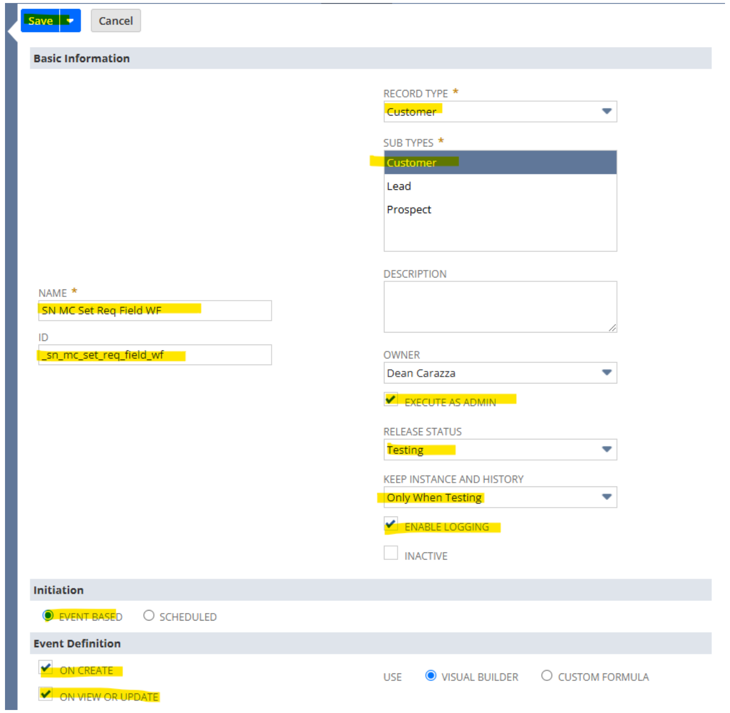


Dynamically Set Required Fields Workflow

- 1. Create the Workflow
  - Navigate to Customization>Workflow>Workflows>New

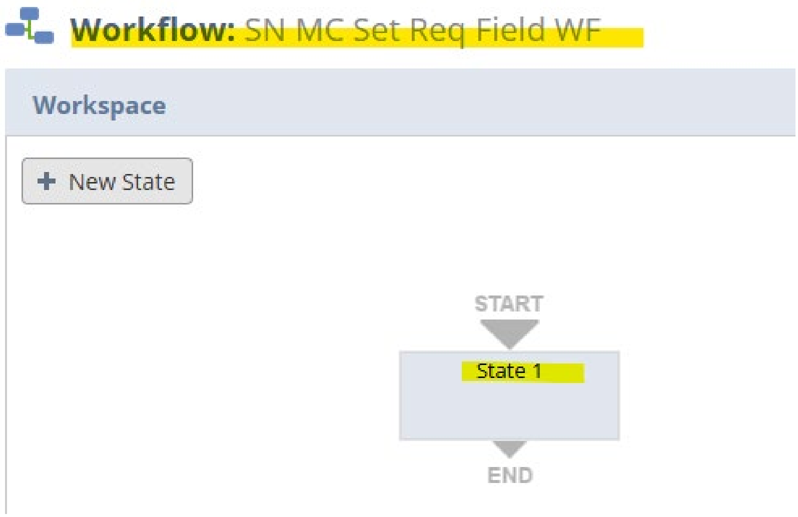


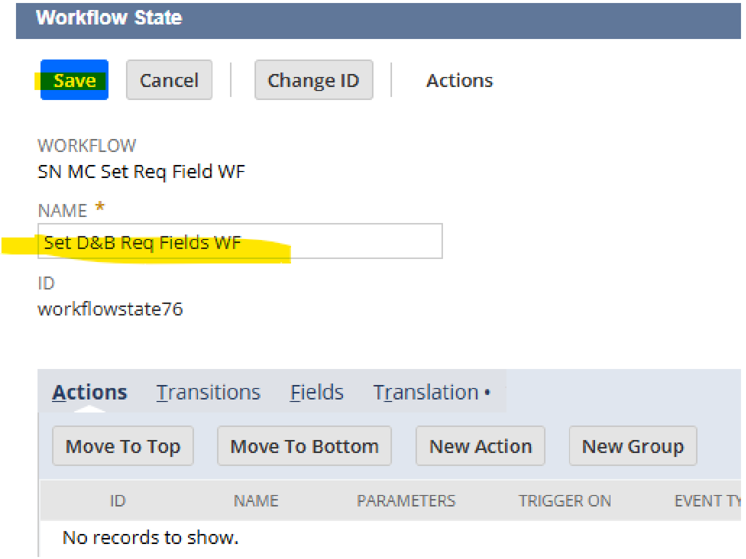
  - Complete the following Basic Information

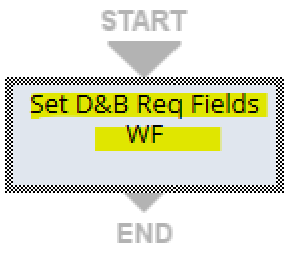


Dynamically Set Required Fields Workflow

- 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







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

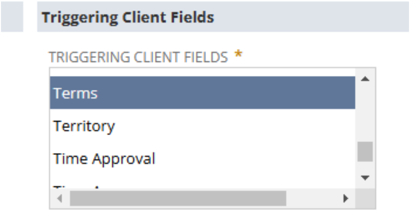
Actions • Transitions Fields Translation •

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

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



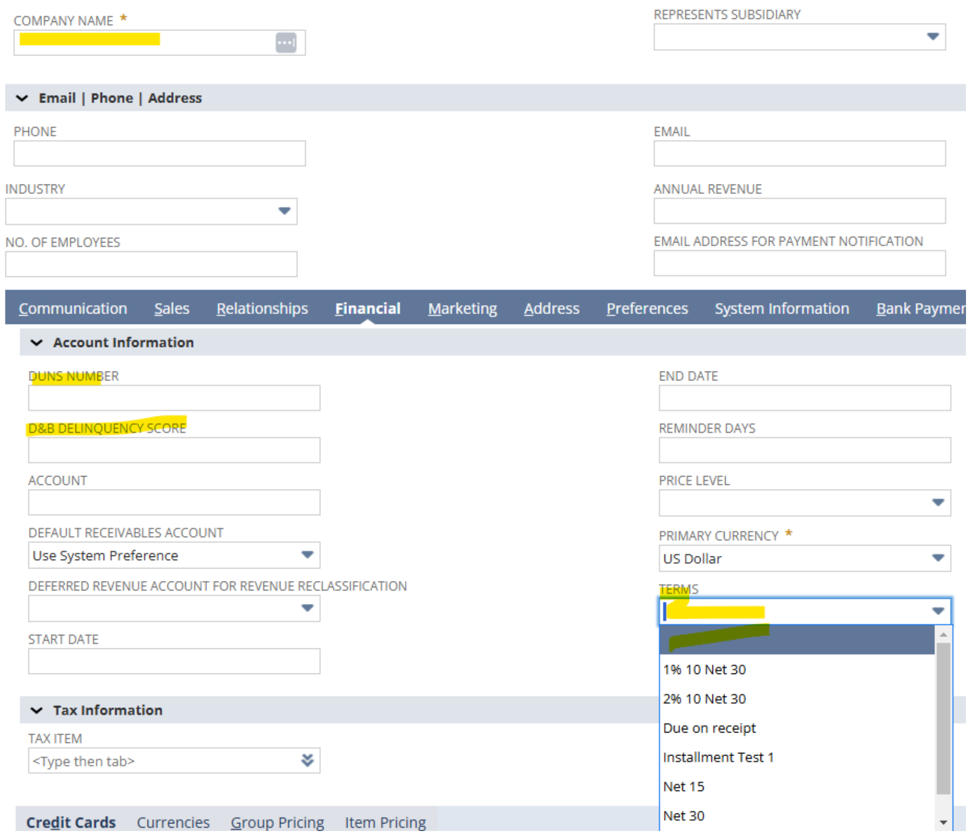
ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction288	Set Field Mandatory	DUNS Number = True	After Field Edit	Selected All	Selected 37 of 39	Terms = 1% 10 Net 30,2% 10 Net 30,Net 15,Net 30,Net 60						✔
workflowaction289	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						✔

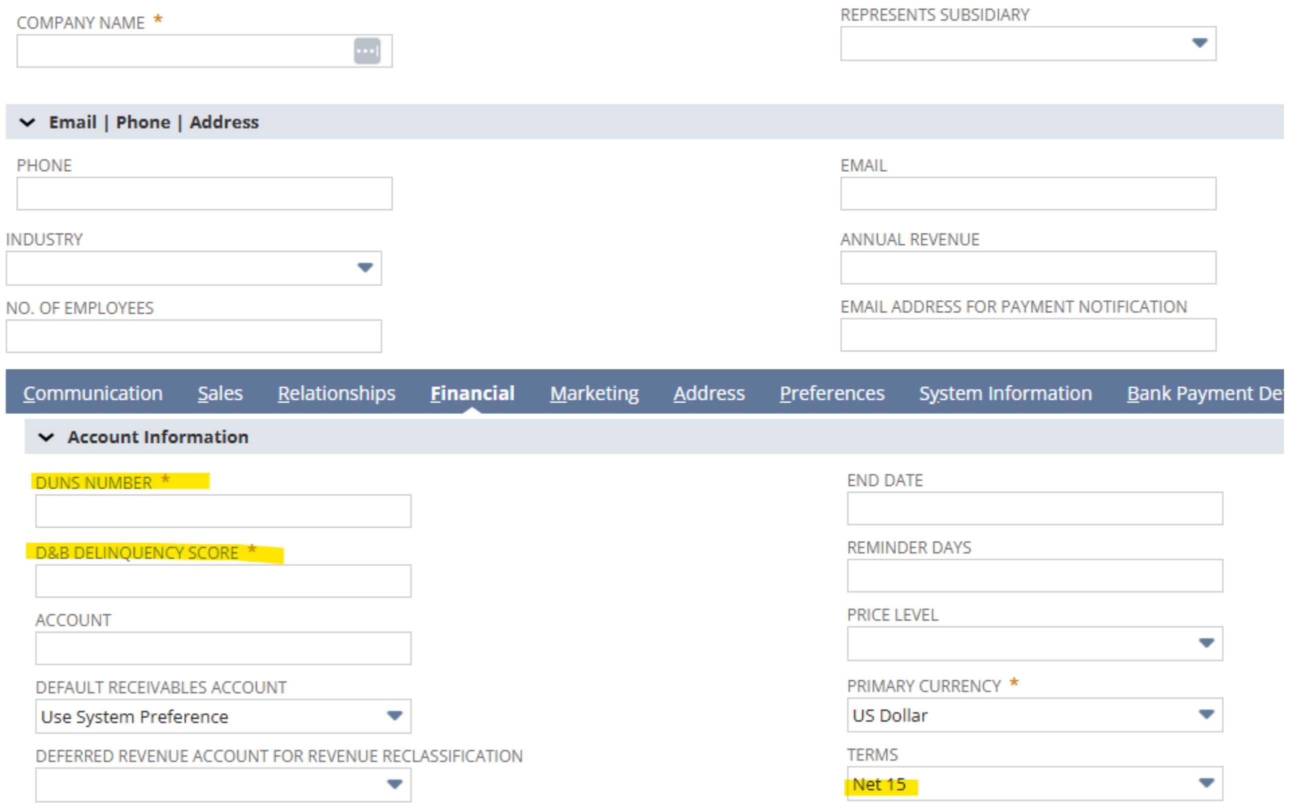
Dynamically Set Required Fields Workflow

- 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

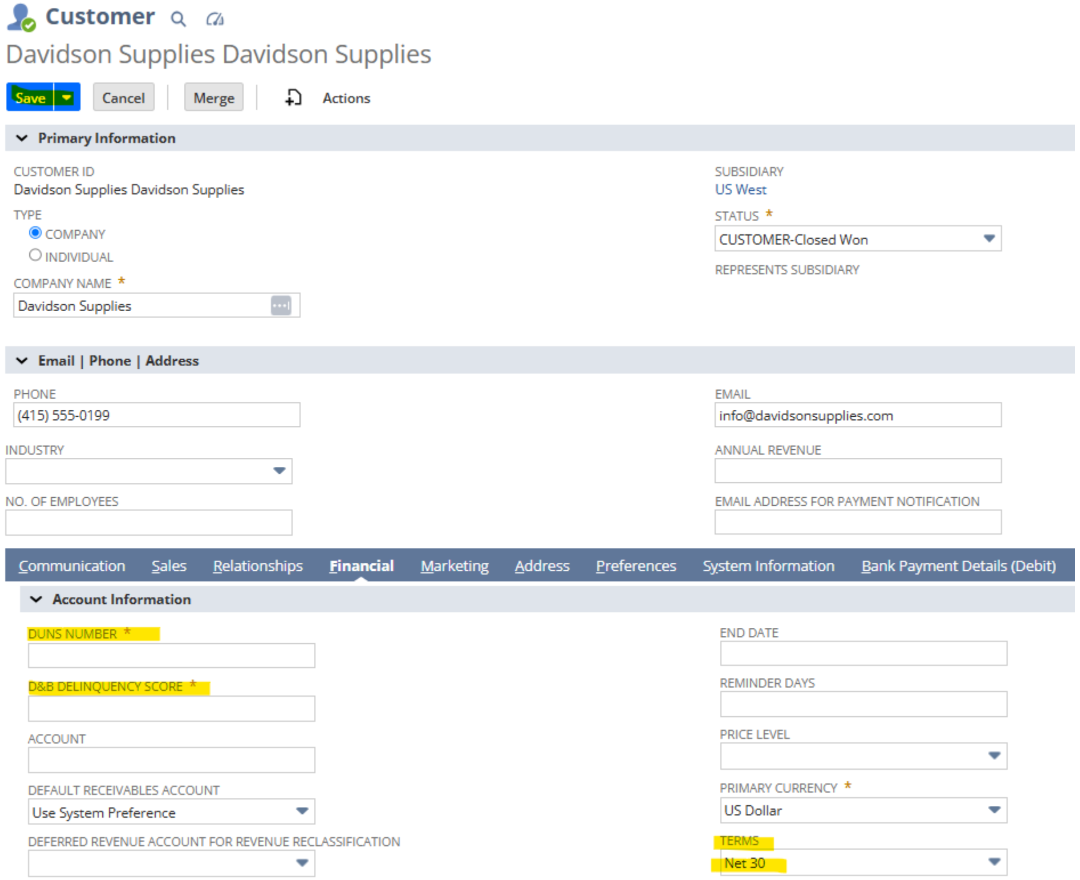
- 2. Test Workflow
  1. Test that when creating a new customer, if select Net Terms see the DUNS Number and D&B Delinquency Score Fields both become required fields and if select a Terms that are not Net, the fields are no longer required
- Field Not Required, then once select Terms both fields become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





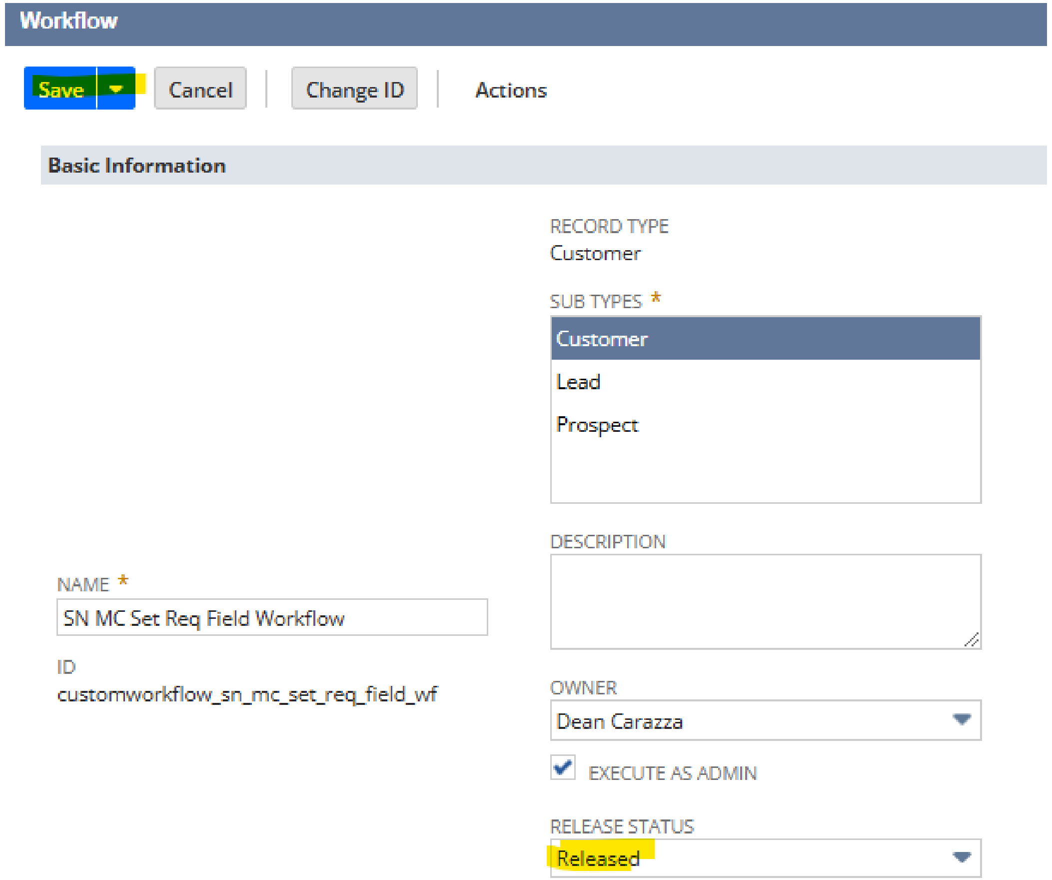
Dynamically Set Required Fields Workflow

- 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



Dynamically Set Required Fields Workflow

- 3. Release Workflow
  - Now that we have finished testing, we can change the status of the workflow to 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

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NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

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