



ScaleNorth NetSuite MasterClass – Session 4 – Automate your Processes with Online Forms and Workflows

January 10, 2024

Confidentiality Notice

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Objective

- ▲ We have started hosting these monthly NetSuite Master Classes, because we have found most common challenges people have with NetSuite
 - Lack of Training
 - Take advantage of saved search reporting
 - CSV Imports
 - Mass Updates
 - Simple workflows to automate processes
 - Custom Records, Forms, Fields
 - Advanced PDFs
 - Don't Know what I don't Know
- ▲ Our goal is to teach these things so companies and more importantly their employees can maximize the value and utility they get out of the NetSuite Platform/Ecosystem

Agenda

▲ Introductions

- ScaleNorth
 - Quick ScaleNorth Overview

▲ Examples and Use Cases

- Automating Creation of Lead/Customer Using an Online Form
- Automating a New Vendor Setup Request using a Custom Record: Online Form and Workflow to Create Vendor Record with Approval

▲ Live Q&A

▲ Next Steps

Introductions



Charles Stevenson

Vice President, Sales

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



Dean Carazza, CPA

Sr. Business Development Manager

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- ▲ 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



270+
Team
Members



1,300+
Years of Collective
NetSuite ERP
Experience

ORACLE NETSUITE
BPO Partner



650+
NetSuite
Certifications
Held by Staff



8.0+
Avg Years of
NetSuite
Experience

ORACLE NETSUITE
Solution Provider



\$2.5B+
Annual Revenue
Transactions
Processed



56%
Percentage
of staff with
CPAs

ORACLE NETSUITE
SuiteCloud Developer Network

Services at a Glance



NetSuite
Implementation



Outsourced
Accounting



NetSuite
Consulting &
Managed Services



Technical
Services

Technology Partners



Automating Creation of Lead/Customer Using an Online Form

The background of the slide is a photograph of a meeting in a modern office. Several people are seated around a long table, engaged in conversation. A man in a suit is standing and presenting to the group. The scene is dimly lit with a blue color cast. The bottom of the slide features a red decorative graphic with abstract shapes.

Creation of Lead/Customer Using an Online Form

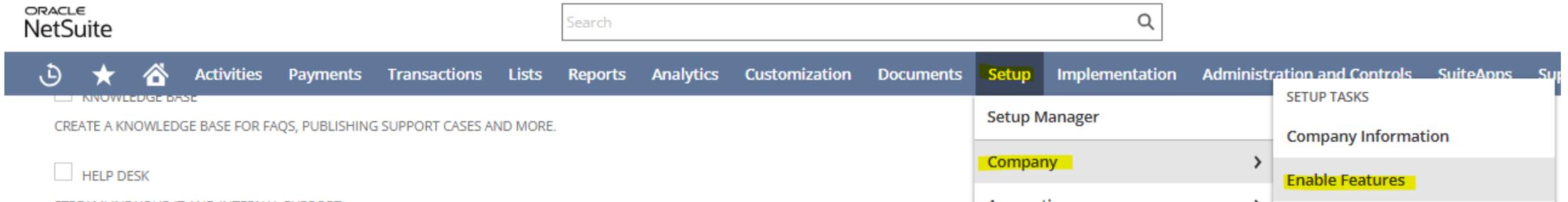
▲ Use Case

- In this example, we want to setup an Online form that can be used as a way for potential customers to contact us with their inquiry so somebody from the sales department can reach out/follow up and help them with their inquiry.
- What follows are the steps we will take to create the workflow for this process

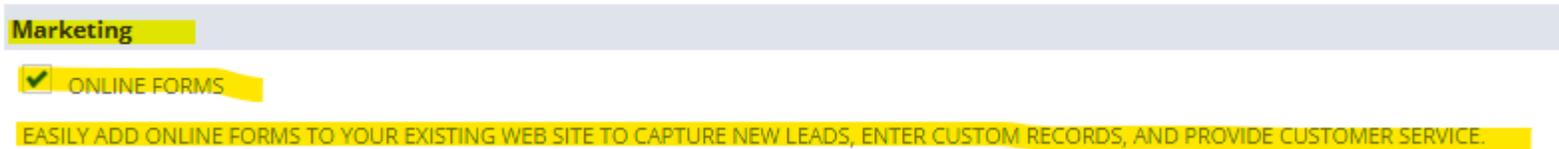
Creation of Lead/Customer Using an Online Form

1. Make sure online forms has been enabled under the marketing tab of enable features

- Navigate to Setup>Company>Enable Features>



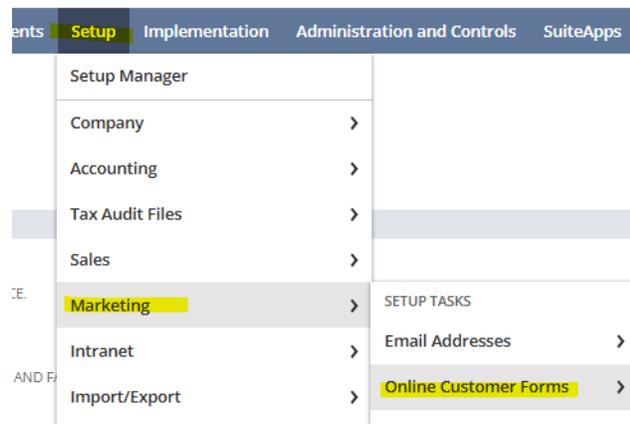
- Make sure Online Forms is Checked



Creation of Lead/Customer Using an Online Form

2. Create an Online Form

- Navigate to Setup>Company>Marketing>Online Forms



- Click the New Online Lead Form Button



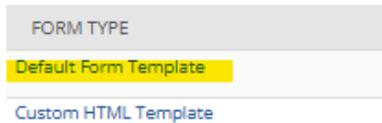
Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued

- Select Type

- Choose Default Form Template

Select Type



FORM TYPE

Default Form Template

Custom HTML Template

- Title

- Give a Title to your Form
- *Note - Before you can save your form, you will have to provide the redirect to URL Field on the Setup Workflow Tab. Otherwise will get the following error message

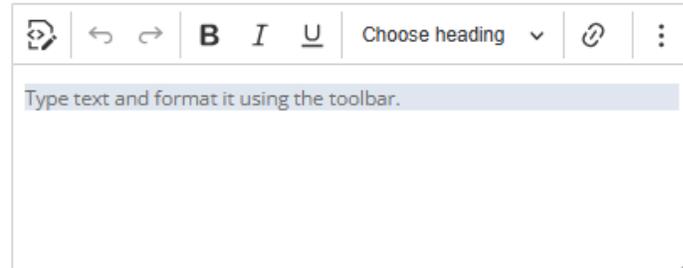
Online Customer Form

Save Cancel

TITLE *

ScaleNorth-Contact Us

MESSAGE



Type text and format it using the toolbar.

td2928790.app.netsuite.com says

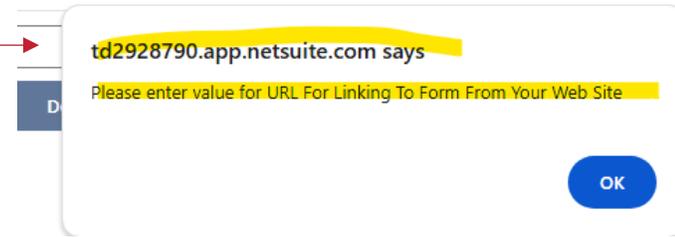
Please enter value for URL For Linking To Form From Your Web Site

OK

Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued

- What follows are the screen shots for filling out the subtabs of the form
- Select Fields
- *Note - Before you can save your form, you will have to provide the redirect to URL Field on the Setup Workflow Tab. Otherwise will get the following error message



Online Customer Form

Save Cancel

TITLE *
ScaleNorth - Contact Us

MESSAGE

Type text and format it using the toolbar.

ENABLE ONLINE
 INACTIVE

Search More

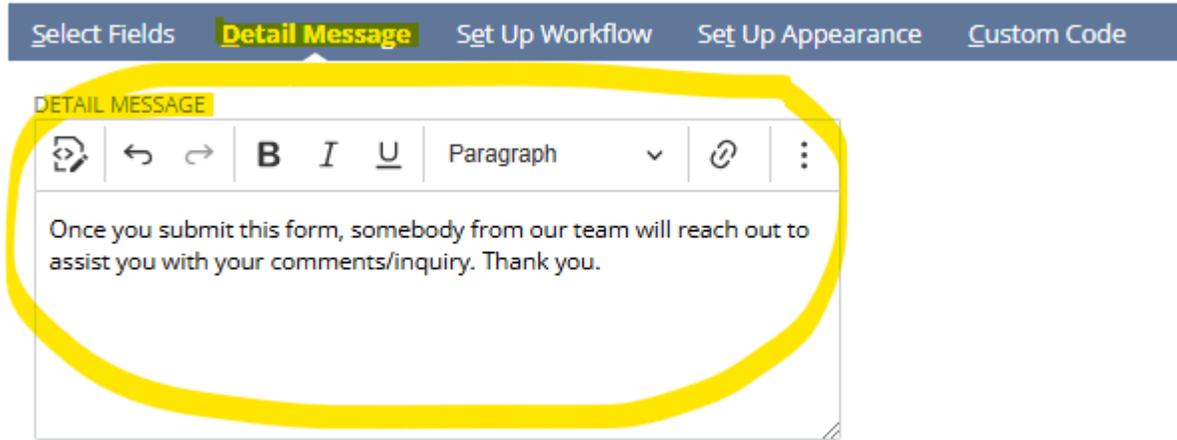
Select Fields Detail Message Set Up Workflow Set Up Appearance Custom Code

When contact first name and contact last name fields are added to the form, the system will first try to find an existing record for the contact before creating a new record.

FIELD *	LABEL *	SECTION	HELP	WIDTH	MANDATORY	SEARCH	HIDE	SELECT	UPDATE CUSTOMER	UPDATE CONTACT
Subsidiary	Subsidiary					Yes	Yes	Yes	Yes	Yes
Company Name	Company Name			25	Yes				Yes	
First Name	First Name			25	Yes				Yes	Yes
Last Name	Last Name			25	Yes				Yes	Yes
Email	Email				Yes				Yes	Yes
Phone Number	Phone Number								Yes	Yes
Comments	Comments			40	Yes				Yes	Yes

Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued
 - Detail Message



The screenshot shows a form editor interface with a dark blue header bar containing the following tabs: Select Fields, **Detail Message**, Set Up Workflow, Set Up Appearance, and Custom Code. Below the header, the 'DETAIL MESSAGE' field is highlighted with a yellow border. The field's toolbar includes icons for undo, redo, bold (B), italic (I), underline (U), a paragraph dropdown menu, a link icon, and a more options icon (three dots). The text within the field reads: "Once you submit this form, somebody from our team will reach out to assist you with your comments/inquiry. Thank you."

Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued

- Set Up Workflow

Select Fields Detail Message **Set Up Workflow** Set Up Appearance Custom Code External

Preferences

CREATE CUSTOMERS AS COMPANIES

SET LEAD STATUS
Lead - Unqualified ALLOW UPDATE

SET LEAD SOURCE
Web ALLOW UPDATE ON CUSTOMER RECORD ALLOW UPDATE ON CONTACT RECORD

SET CAMPAIGN EVENT
[Default Event]

DEFAULT SUBSIDIARY
Parent Company : US West

REDIRECT TO FORM

REDIRECT TO URL
http://www.scalenorth.com

HANDLE DUPLICATE RECORDS
Update the first record created USE DUPLICATE DETECTION CRITERIA

Customer Notification

SEND AUTO-REPLY EMAIL
SN MC Online Lead Form Auto Reply

SUBJECT
Thanks for Reaching Out

Sales Rep Notification

SEND NOTIFICATION EMAIL

TEMPLATE FOR NEW LEADS
- Default -

TEMPLATE FOR EXISTING CUSTOMERS
- Default -

CC

Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued
 - Set Up Appearance

Select Fields Detail Message Set Up Workflow **Set Up Appearance** Cust

NUMBER OF COLUMNS SHOWN
Single Column List

COLOR THEME

FONT

UNLAYERED SECTIONS

BUTTON ALIGNMENT
Left

FORM LOGO
V3 ScaleNorth_logo_RGB_Pantone-200-Black.png

Save Cancel | Actions

Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued

- Set Up Appearance

Select Fields | Detail Message | Set Up Workflow | **Set Up Appearance** | Custom

NUMBER OF COLUMNS SHOWN
Single Column List

COLOR THEME

FONT

UNLAYERED SECTIONS

BUTTON ALIGNMENT
Left

FORM LOGO
V3 ScaleNorth_logo_RGB_Pantone-200-Black.png

Save | Cancel | Actions

- Note, for logo to show up on form, had to check the Available without login checkbox on the file in the file cabinet

File

Edit | Back | Download | Actions

FILE NAME
V3 ScaleNorth_logo_RGB_Pantone-200-Black.png

FILE TYPE
PNG Image

FILE SIZE (BYTES)
8,268

FOLDER
Images

DESCRIPTION

ALT IMAGE TAG

URL
<http://td2928790.shop.netsuite.com/core/media/media.nl?id=7833&c=TD2928790&h=cv8ddx0IDPqOowuEif5kMhU-FmVWkblU1M17vbN4pD6Lbk>

URL
<https://td2928790.secure.netsuite.com/core/media/media.nl?id=7833&c=TD2928790&h=cv8ddx0IDPqOowuEif5kMhU-FmVWkblU1M17vbN4pD6Lbk>

URL
<https://td2928790.app.netsuite.com/core/media/media.nl?id=7833&c=TD2928790&h=cv8ddx0IDPqOowuEif5kMhU-FmVWkblU1M17vbN4pD6Lbk>

MEDIA ITEM



- INACTIVE
- AVAILABLE FOR SUITEBUNDLES
- HIDE IN SUITEBUNDLE
- AVAILABLE WITHOUT LOGIN
- COMPANY-WIDE USAGE
- GENERATE URL TIME STAMP
- CLASS RESTRICTION
none
- DEPARTMENT RESTRICTION
none
- PRIVATE FILE
- OWNER
-System-

Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued

- External

- Note this is where the URL Link is for the online form you created
 - › Can work with Website resource to embed on your website. If need help ScaleNorth can help if you don't have such resource.

Online Customer Form

[Edit](#) | [Back](#) | [Preview](#) | [Actions](#)

TITLE
ScaleNorth - Contact Us

MESSAGE
<div class='bgmd'>

</div>

ENABLE ONLINE
 INACTIVE

[Select Fields](#) | [Detail Message](#) | [Set Up Workflow](#) | [Set Up Appearance](#) | [Custom Code](#) | **External**

NUMBER OF REQUESTS
0

NUMBER OF SUBMITS
0

INTERNAL FORM URL
</app/crm/common/onlineforms/internalonlineform.nl?formid=5&h=AAFdikaljG4feenuW1tTuomzlrS238a76yqX3BwLBBd7nXOzUOU>

PUBLISHABLE FORM URL
<https://td2928790.extforms.netsuite.com/app/site/crm/externalleadpage.nl?compid=TD2928790&formid=5&h=AAFdikaljG4feenuW1tTuomzlrS238a76yqX3BwLBBd7nXOzUOU>

Creation of Lead/Customer Using an Online Form

3. Testing the Online Form

- You can click on the URL link from the External tab of the online form to launch the form. Note I saved the URL as a NetSuite Home Dashboard Shortcut so could easily access without having to pull up the online form record every time.

Online Customer Form

[Edit](#) [Back](#) [Preview](#) [Actions](#)

TITLE

ScaleNorth - Contact Us

MESSAGE

<div class='bgmd'>

</div>

[Select Fields](#) [Detail Message](#) [Set Up Workflow](#) [Set Up Appearance](#) [Custom Code](#) [External](#)

NUMBER OF REQUESTS

0

NUMBER OF SUBMITS

0

INTERNAL FORM URL

/app/crm/common/onlineforms/internalonlineform.nl?formid=5&h=AAFdikaljG4feenuW1tTuomzlrS238a76yqX3BwLBBd7nXOzUOU

PUBLISHABLE FORM URL

<https://td2928790.extforms.netsuite.com/app/site/crm/externalleadpage.nl?compid=TD2928790&formid=5&h=AAFdikaljG4feenuW1tTuomzlrS238a76yqX3BwLBBd7nXOzUOU>



ScaleNorth - Contact Us

* Company Name

* First Name

* Last Name

* Email

Phone Number

* Comments

Once you submit this form, somebody from our team will reach out to assist you with your comments/inquiry. Thank you.

Creation of Lead/Customer Using an Online Form

3. Testing the Online Form

- Expectation is that if we fill out the form and submit it will do the following:
 - Redirect me to ScaleNorth website
 - Lead Record will be created
 - Send an automated email from our email template letting them know we received their inquiry and somebody will be reaching out (email will be logged on the communication>Messages tab of the Lead record).



ScaleNorth - Contact Us

* Company Name

* First Name

* Last Name

* Email

Phone Number

* Comments

Once you submit this form, somebody from our team will reach out to assist you with your comments/inquiry. Thank you.

A screenshot of the ScaleNorth website. The browser address bar shows 'scalenorth.com/?subsidiary=2&whence='. The page features the ScaleNorth logo in the top left and a navigation menu with 'Solutions', 'Services', 'Industries', 'Partners', and 'About' in the top right. The main content area has a dark red background with the headline 'The Only NetSuite Partner You Will Ever Need' in white. Below the headline, there is a paragraph of text: 'ScaleNorth provides NetSuite and accounting expertise, business infrastructure, and ongoing premium service to help drive your company's growth — now and in the future.'

Creation of Lead/Customer Using an Online Form

3. Testing the Online Form

- Expectation is that if we fill out the form and submit it will do the following:
 - Lead Record will be created
 - Send an automated email from our email template letting them know we received their inquiry and somebody will be reaching out (email will be logged on the communication>Messages tab of the Lead record).

The screenshot displays the NetSuite CRM interface for a lead record. At the top, there is a navigation bar with 'Lead' and search icons. Below this, the lead is identified as '135 Test Customer'. A secondary navigation bar contains buttons for 'Edit', 'Back', and 'Actions'. The main content area is divided into sections: 'Primary Information' and 'Communication'. The 'Primary Information' section lists fields such as CUSTOMER ID (135 Test Customer), TYPE (Company), COMPANY NAME (Test Customer), SUBSIDIARY (US West), STATUS (LEAD-Unqualified), SALES REP, LEAD SOURCE (Web), and COMMENTS (I need NetSuite Help with my Reporting and Dashboards). The 'Communication' section shows a list of messages with columns for #, VIEW, DATE, AUTHOR, PRIMARY RECIPIENT, SUBJECT, TYPE, FILES, ATTACHMENTS, INTERNAL ONLY, and REMOVE. A single message is listed with the subject 'Thanks for Reaching Out'. Below the message list, there are tabs for 'Recipients', 'Message', and 'Attachments'. The 'Message' tab is active, showing the subject 'Thanks for Reaching Out' and the message content: 'Hi Dean, Thanks for Reaching out and contacting us. We have received your inquiry and somebody from our team will be reaching out to you very shortly. Best Regards,'.

Lead

135 Test Customer

Primary Information

CUSTOMER ID
135 Test Customer

TYPE
Company

COMPANY NAME
Test Customer

SUBSIDIARY
US West

STATUS
LEAD-Unqualified

SALES REP

LEAD SOURCE
Web

COMMENTS
I need NetSuite Help with my Reporting and Dashboards

LAST MODIFIED DATE
01/09/2025

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

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	ATTACHMENTS	INTERNAL ONLY	REMOVE
1	View	01/09/2025 4:39 pm	sspure_svcs_mm_us_build@netsuite.com	dcarazza@scalenorh.com	Thanks for Reaching Out	Email	No		No	Remove

Recipients Message Attachments

SUBJECT
Thanks for Reaching Out

MESSAGE

Hi Dean,

Thanks for Reaching out and contacting us. We have received your inquiry and somebody from our team will be reaching out to you very shortly.

Best Regards,

Automating a New Vendor Setup Request using a Custom Record: Online Form and Workflow to Create Vendor Record with Approval

New Vendor Setup Request Online Form and Approval Workflow

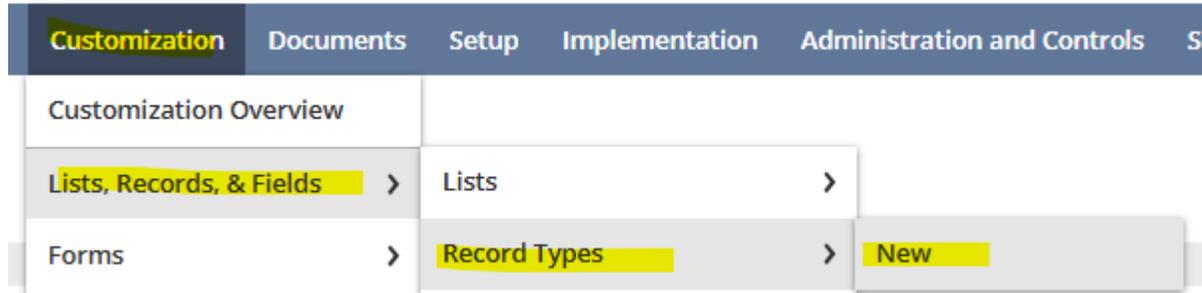
▲ Use Case

- In this example, we want to create a custom record:online form for a New Vendor Request.
- This will allow users to submit a Vendor Request using an online form
- We can create a workflow that will allow the ability to approve/reject the New Vendor Request and add an action that will automate creating the vendor record for approved New Vendor Requests.
- What follows are the steps we will take to create the custom record, online form, and workflow

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Navigate to Customization>List, Records, & Fields>Record Type>New



- Give it a name and ID

- Hit Save

Custom Record Type

NAME *

ID

ORIGINATING CUSTOM SEGMENT

OWNER

DESCRIPTION

INCLUDE NAME FIELD

SHOW ID

SHOW CREATION DATE ON RECORD ON LIST

SHOW LAST MODIFIED ON RECORD ON LIST

SHOW OWNER ON RECORD ON LIST ALLOW CHANGE

ACCESS TYPE

ALLOW UI ACCESS

ALLOW MOBILE ACCESS

ALLOW ATTACHMENTS

SHOW NOTES

ENABLE MAIL MERGE

RECORDS ARE ORDERED

SHOW REMOVE LINK ALLOW CHILD RECORD EDITING ALLOW DELETE

ALLOW QUICK SEARCH

ALLOW QUICK ADD

ENABLE SYSTEM NOTES

INCLUDE IN GLOBAL SEARCH

INCLUDE IN SEARCH MENU

ENABLE OPTIMISTIC LOCKING

ENABLE INLINE EDITING

ENABLE NAME TRANSLATION

HIERARCHY

INACTIVE

Subtabs: Sublists, Icon, Numbering, Permissions, Links, Managers, Translation

ID	TITLE *	TRANSLATION	PARENT

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
- Fields

DESCRIPTION	ID	TYPE	LIST/RECORD	TAB	SHOW IN LIST
Company Name	custrecord_sn_nvs_company_name	Free-Form Text			No
Comments	custrecord_sn_nvs_comments	Text Area			No
Approval Status	custrecord_sn_nvs_approval_status	List/Record	Vendor Bill Approval Status		No
Next Approver	custrecord_sn_nvs_next_approver	List/Record	Employee		No
Vendor	custrecord_sn_dc_nvs_vendor	List/Record	Vendor		No
Website	custrecord_sn_nvs_website	Hyperlink		General Information	No
Email	custrecord_sn_nvs_email	Email Address		General Information	No
Phone Number	custrecord_sn_nvs_phone	Phone Number		General Information	No
Category	custrecord_sn_nvs_category	List/Record	Vendor Category	General Information	No
Terms	custrecord_sn_nvs_terms	List/Record	Term	Financial Information	No

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
- Subtabs

ID	TITLE	TRANSLATION	PARENT
tab_396_td2928790_430	General Information		General Information
tab_397_td2928790_759	Financial Information		Financial Information

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
- Online Forms

Fields Subtabs Sublists Icon • Numbering • Forms • **Online Forms** P

SHOW INACTIVES

New Online Form New Online HTML Form

NAME ▲ EN

No records to show.

- Online Form>Fields

Online Custom Record Form

Edit Cancel Preview

TITLE

New Vendor Setup Request Form

MESSAGE

<div class='bgmd'>

</div>

ENABLE ONLINE

INACTIVE

FIELD	LABEL	SECTION	HELP	WIDTH	MANDATORY	SEARCH	HIDE	SELECT
Company Name	Company Name	General Information		25	Yes			
Website	Website	General Information			Yes			
Category	Category	General Information			Yes			Yes
Email	Email	General Information		25	Yes			
Phone Number	Phone Number	General Information						
Comments	Comments	General Information		25	Yes			
Terms	Terms	Financial Information						Yes

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
- Online Forms>Detail Message

Online Custom Record Form

Save | Cancel | Actions

TITLE *
New Vendor Setup Request Form

MESSAGE

Type text and format it using the toolbar.

Select Fields | **Detail Message** | Set Up Workflow | Set Up Appearance

DETAIL MESSAGE

Once you submit this form, one of our Accounts Payable Representative's will review this request and approve or reject accordingly. Please contact AP@email.com if you have any questions or concerns on this request. Thanks.

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
- Online Forms>Set Up Workflow

Online Custom Record Form

Save | Cancel | Actions

TITLE *
New Vendor Setup Request Form

MESSAGE

↻ ↶ ↷ **B** *I* U Choose heading ▾

Type text and format it using the toolbar.

Select Fields | Detail Message | **Set Up Workflow**

NOTIFY BY EMAIL

REDIRECT TO URL

HANDLE DUPLICATE RECORDS

Save | Cancel | Actions

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
- Online Forms>Set Up Appearance

Online Custom Record Form

Save Cancel Actions

TITLE *
New Vendor Setup Request Form

MESSAGE

Type text and format it using the toolbar.

Select Fields Detail Message Set Up Workflow **Set Up Appearance**

NUMBER OF COLUMNS SHOWN
Single Column List

COLOR THEME

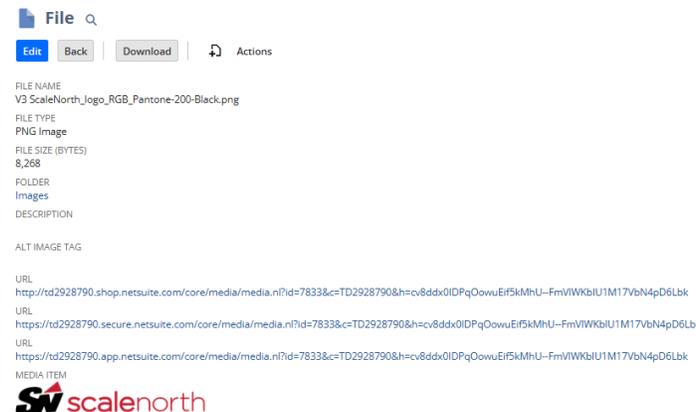
FONT

UNLAYERED SECTIONS

BUTTON ALIGNMENT
Left

FORM LOGO
V3 ScaleNorth_logo_RGB_Pantone-200-BI

Note, for logo to show up on form, had to check the Available without login checkbox on the file in the file cabinet



- INACTIVE
- AVAILABLE FOR SUITEBUNDLES
- HIDE IN SUITEBUNDLE
- AVAILABLE WITHOUT LOGIN
- COMPANY-WIDE USAGE
- GENERATE URL TIME STAMP
- CLASS RESTRICTION
none
- DEPARTMENT RESTRICTION
none
- PRIVATE FILE
- OWNER
-System-

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
- Online Forms>Set Up Appearance

Online Custom Record Form

Save Cancel Actions

TITLE *
New Vendor Setup Request Form

MESSAGE

Type text and format it using the toolbar.

Select Fields Detail Message Set Up Workflow **Set Up Appearance**

NUMBER OF COLUMNS SHOWN
Single Column List

COLOR THEME

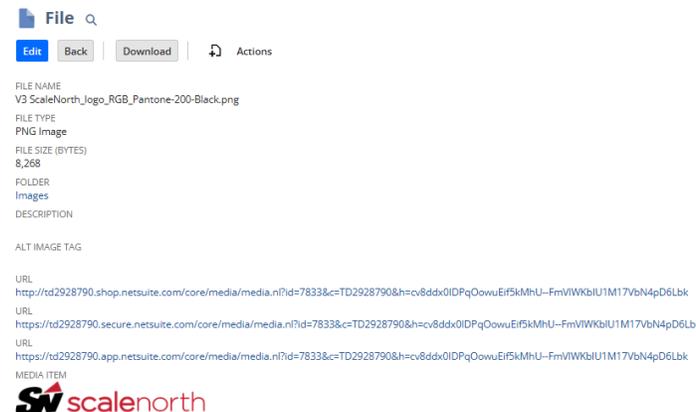
FONT

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V3 ScaleNorth_logo_RGB_Pantone-200-BI

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- INACTIVE
- AVAILABLE FOR SUITEBUNDLES
- HIDE IN SUITEBUNDLE
- AVAILABLE WITHOUT LOGIN
- COMPANY-WIDE USAGE
- GENERATE URL TIME STAMP
- CLASS RESTRICTION
none
- DEPARTMENT RESTRICTION
none
- PRIVATE FILE
- OWNER
-System-

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
- Online Forms>External
 - Note this is where the URL Link is for the online form you created
 - › You can share this with people and tell users to save as a shortcut in NetSuite so they can easily access the form when they need to submit a New Vendor Request

Online Custom Record Form

The screenshot shows the configuration page for an online custom record form. At the top, there are buttons for 'Save', 'Cancel', and 'Actions'. Below this is a 'TITLE' field with a red asterisk, containing the text 'New Vendor Setup Request Form'. Underneath is a 'MESSAGE' field with a rich text editor toolbar (including icons for undo, redo, bold, italic, underline, heading, link, and list) and a text area containing the placeholder text 'Type text and format it using the toolbar.' Below the message field is a dark blue navigation bar with tabs: 'Select Fields', 'Detail Message', 'Set Up Workflow', 'Set Up Appearance', 'Custom Code', and 'External' (which is highlighted in yellow). Below the navigation bar, there are three sections: 'NUMBER OF REQUESTS' with the value '43', 'NUMBER OF SUBMITS' with the value '15', and 'INTERNAL FORM URL' with the value '/app/crm/common/onlineforms/internalonlineform.nl?formid=4&h=AAFdikal_Eap63PEn9gf-bn2r8QkjRgnKxp12JbC9noggxj86fQ'. The 'PUBLISHABLE FORM URL' is highlighted in yellow and shows the full URL: 'https://td2928790.extforms.netsuite.com/app/site/crm/externalcustrecordpage.nl?compid=TD2928790&formid=4&h=AAFdikal_Eap63PEn9gf-bn2r8QkjRgnKxp12JbC9noggxj86fQ'.

Save | Cancel | Actions

TITLE *

New Vendor Setup Request Form

MESSAGE

Type text and format it using the toolbar.

Select Fields | Detail Message | Set Up Workflow | Set Up Appearance | Custom Code | **External**

NUMBER OF REQUESTS
43

NUMBER OF SUBMITS
15

INTERNAL FORM URL
/app/crm/common/onlineforms/internalonlineform.nl?formid=4&h=AAFdikal_Eap63PEn9gf-bn2r8QkjRgnKxp12JbC9noggxj86fQ

PUBLISHABLE FORM URL
https://td2928790.extforms.netsuite.com/app/site/crm/externalcustrecordpage.nl?compid=TD2928790&formid=4&h=AAFdikal_Eap63PEn9gf-bn2r8QkjRgnKxp12JbC9noggxj86fQ

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Now that we have created our Custom Record and configured the Online Form, we can test it out
- Click on the External URL Link

Online Custom Record Form

Save Cancel Actions

TITLE *
New Vendor Setup Request Form

MESSAGE

Type text and format it using the toolbar.

Select Fields Detail Message Set Up Workflow Set Up Appearance Custom Code **External**

NUMBER OF REQUESTS
43

NUMBER OF SUBMITS
15

INTERNAL FORM URL
/app/crm/common/onlineforms/internalonlineform.nl?formid=4&h=AAFdikaI_Eap63PE9gf-bn2r8QkjRgnKxp12JbC9noggxj86fQ

PUBLISHABLE FORM URL
https://td2928790.extforms.netsuite.com/app/site/crm/externalcustrecordpage.nl?compid=TD2928790&formid=4&h=AAFdikaI_Eap63PE9gf-bn2r8QkjRgnKxp12JbC9noggxj86fQ



General Information

* Company Name

* Website

* Category

* Email

Phone Number

* Comments

Financial Information

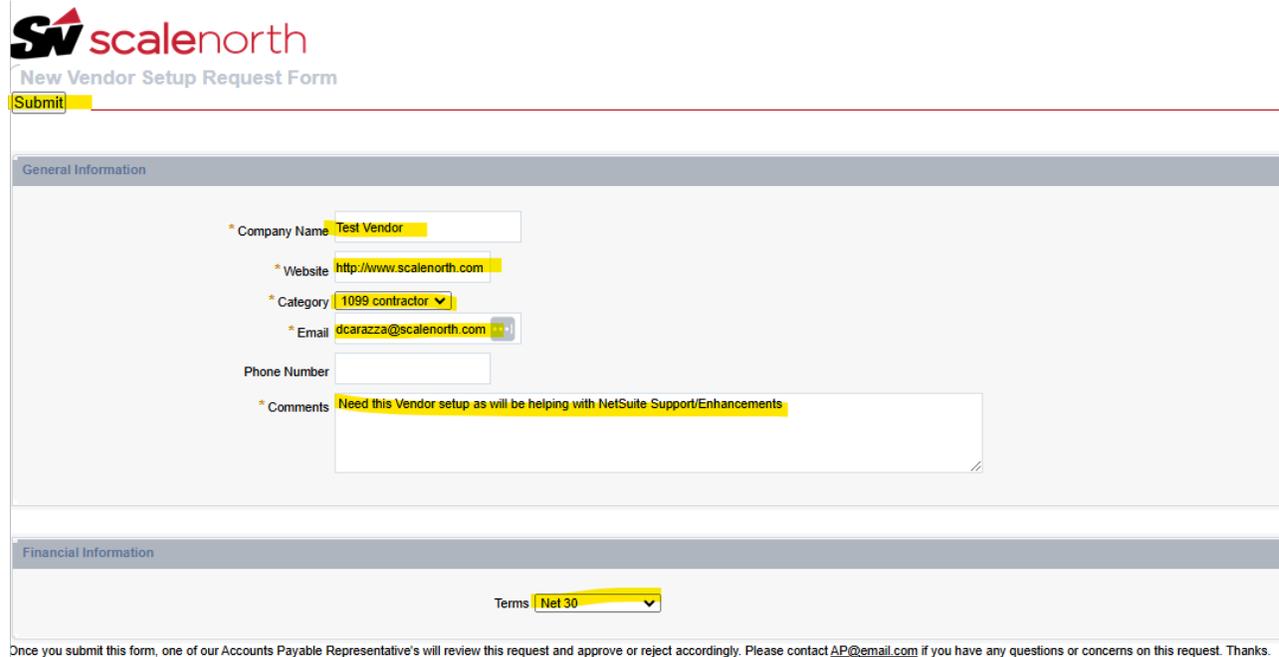
Terms

Once you submit this form, one of our Accounts Payable Representative's will review this request and approve or reject accordingly. Please contact AP@email.com if you have any questions or concerns on this request. Thanks.

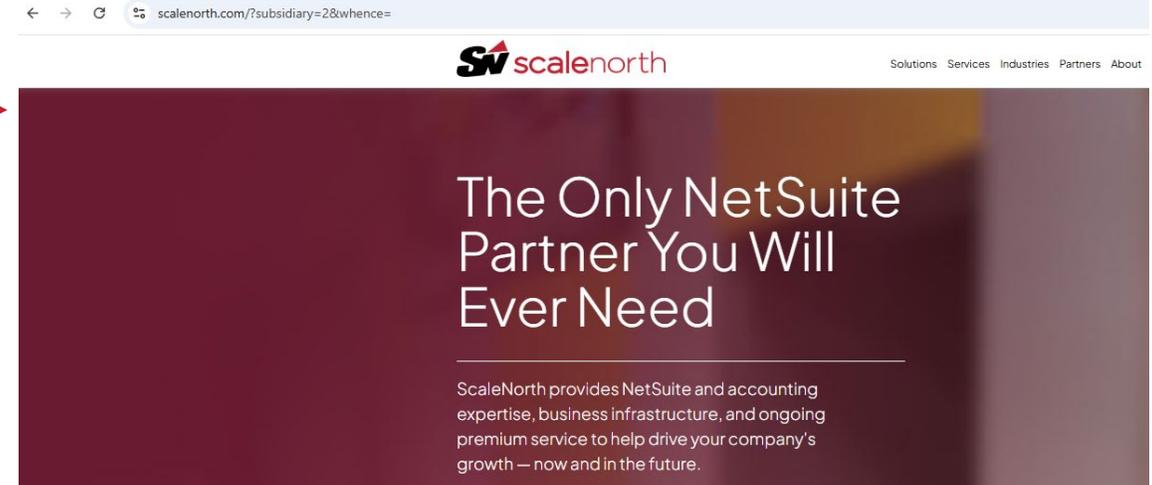
New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Test filling out the form. Expectation is following after submit
 - Redirects to the ScaleNorth Website
 - Creates a New Vendor Request Record



The screenshot shows the 'New Vendor Setup Request Form' on the ScaleNorth website. The form is divided into two main sections: 'General Information' and 'Financial Information'. In the 'General Information' section, the following fields are filled out: Company Name (Test Vendor), Website (http://www.scalenorth.com), Category (1099 contractor), Email (dcarazza@scalenorth.com), and Comments (Need this Vendor setup as will be helping with NetSuite Support/Enhancements). The 'Financial Information' section shows the Terms set to Net 30. A red arrow points from the 'Submit' button in the top left corner of the form to the right-hand screenshot.



Once you submit this form, one of our Accounts Payable Representative's will review this request and approve or reject accordingly. Please contact AP@email.com if you have any questions or concerns on this request. Thanks.

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Test filling out the form. Expectation is following after submit
 - Creates a New Vendor Request Record
 - › Navigate to Customization>Lists, Records, & Fields>Record Types>
 - Search for New Vendor Setup Request
 - Can click on the List button to show the list of these records that have been created

Record Types

[New Type](#)

[FILTERS](#)

SHOW INACTIVES

102 — 192 [◀](#) [▶](#) TOTAL: 192

EDIT	FROM BUNDLE	ID	INTERNAL ID *	OWNER	CUSTOM SEGMENT	LIST	NEW RECORD	SEARCH
	Deployment Type	39609	customrecord_ns_ibe_act_conf_deploy_type	102	Dean Carazza	List	New Record	Search
	New Vendor Setup Request		customrecord_sn_new_vendor_setup_req	1025	Dean Carazza	List	New Record	Search

- Can view #16 which is the one we just created

[New Vendor Setup Request List](#)

VIEW [Default](#) [Customize View](#) [New New Vendor Setup Request](#)

[FILTERS](#)

SHOW INACTIVES [EDIT](#) [X](#)

EDIT VIEW	INTERNAL ID *	NAME
Edit View	1	1
Edit View	3	3
Edit View	4	4
Edit View	5	5
Edit View	6	6
Edit View	7	7
Edit View	9	9
Edit View	10	10
Edit View	12	12
Edit View	13	13
Edit View	14	14
Edit View	15	15
Edit View	16	16

New Vendor Setup Request Online Form and Approval Workflow

1. Create Custom Record

- Test filling out the form. Expectation is following after submit
- Can view #16 which is the one we just created

New Vendor Setup Request

16

Edit Back Actions

NAME
16
 INACTIVE
COMPANY NAME
Test Vendor
COMMENTS
Need this Vendor setup as will be helping with NetSuite Support/Enhancements

APPROVAL STATUS
Pending Submit For Approval
NEXT APPROVER
VENDOR
SCRIPT ID
val_329241_td2928790_989

Note - Can customize the form to move the General and Financial Subtabs to be first

General Information Financial Information Notes Files Workflow

WEBSITE
http://www.scalenorth.com

EMAIL
dcarazza@scalenorth.com

PHONE NUMBER

CATEGORY
1099 contractor

New Vendor Setup Request

16

Edit Back Actions

NAME
16
 INACTIVE
COMPANY NAME
Test Vendor
COMMENTS
Need this Vendor setup as will be helping with NetSuite Support/Enhancements

APPROVAL STATUS
Pending Submit For Approval
NEXT APPROVER
VENDOR
SCRIPT ID
val_329241_td2928790_989

General Information Financial Information Notes Files Workflow

TERMS
Net 30

Custom Entry Form

Save Cancel Save & Move Elements

NAME *
Custom V3 New Vendor Setup Request Form

ID

TYPE
Custom Record

RECORD TYPE
V3 New Vendor Setup Request

PRINT TEMPLATE
Default

Subtabs Field Groups Fields Actions Sublists

Move To Top Move To Bottom

DESCRIPTION

- General Information
- Financial Information
- Notes
- File Cabinet

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Now that we have successfully created and tested our custom record and online form, we can create a workflow to handle adding an approval process as well as automating the creation of a Vendor when the New Vendor Setup Request has been approved.
 - Note one of the benefits of learning workflows is you can often repurpose things you have done on other workflows. For example, the approval part of this workflow is an exact copy of the Approval Workflow we did for Vendor Bill Approvals back in Master Class Session 2. Would recommend re-visiting that class for detailed step by step instruction.
 - What follows here are the screen shots of creating the workflow and each related state, transition, and actions

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Now that we have successfully created and tested our custom record and online form, we can create a workflow to handle adding an approval process as well as automating the creation of a Vendor when the New Vendor Setup Request has been approved.
 - Note one of the benefits of learning workflows is you can often repurpose things you have done on other workflows. For example, the approval part of this workflow is an exact copy of the Approval Workflow we did for Vendor Bill Approvals back in Master Class Session 2. Would recommend re-visiting that class for detailed step by step instruction.
 - What follows here are the screen shots of creating the workflow and each related state, transition, and actions

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Creating the Workflow

Workflow

Save | Cancel | Change ID | Actions

Basic Information

RECORD TYPE
New Vendor Setup Request

DESCRIPTION

NAME *
Create Vendor from New Vendor Setup Form

ID
customworkflow_sn_nvs_workflow

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Testing

KEEP INSTANCE AND HISTORY
Only When Testing

ENABLE LOGGING

INACTIVE

Initiation

EVENT BASED | SCHEDULED

Event Definition

ON CREATE | ON VIEW OR UPDATE

USE VISUAL BUILDER | CUSTOM FORMULA

TRIGGER TYPE
- All -

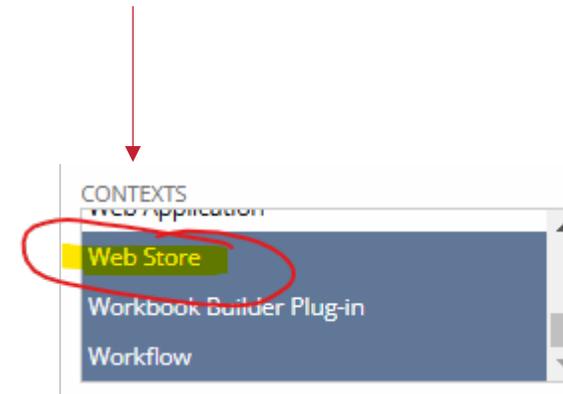
CONDITION

EVENT TYPES

SAVED SEARCH CONDITION

Note - Since the New Vendor Request record is created from an online form which system uses context of Webstore, we need to make sure Web Store Context is also selected see screen shot below

For Demo - Make sure select version of record using for demo

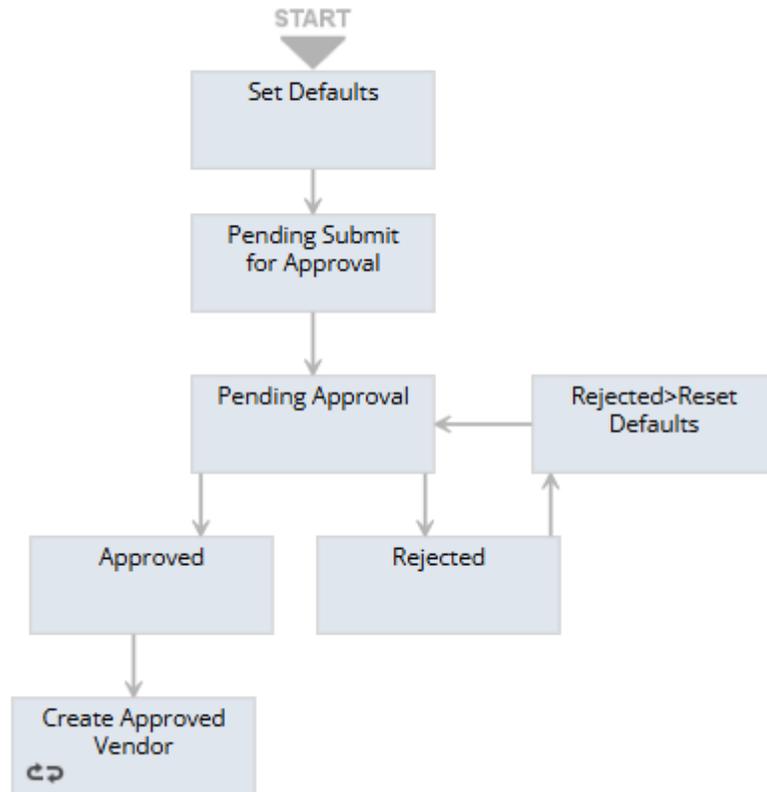


New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow

- Creating the Workflow

- Screen shot below is finished workflow. What will follow is screen shots of each State, Actions, and Transition



New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Set Defaults – State

Workflow State

Save Cancel Change ID Actions

WORKFLOW
Create Vendor from New Vendor Setup Form

NAME *
Set Defaults

ID
workflowstate97

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

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	RECCURENCE	UNIT	ACTIVE
workflaction350	Set Field Value	Approval Status=Pending Submit For Approval	Entry	Selected All	Selected 38 of 39							<input checked="" type="checkbox"/>

Parameters

FIELD *
Approval Status

Value

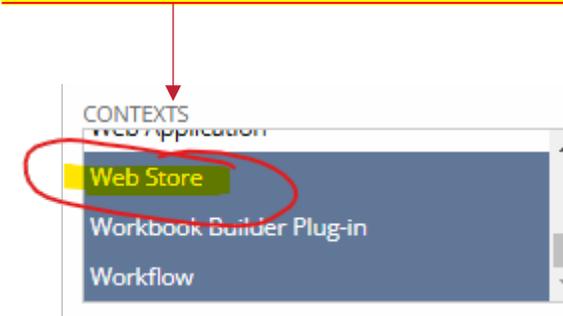
STATIC VALUE

TEXT

CHECKED

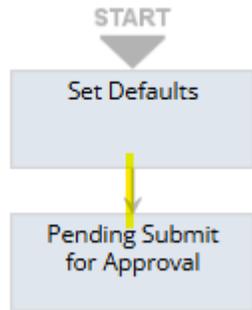
SELECTION
Pending Submit For Approval

Note – Since the New Vendor Request record is created from an online form which system uses context of Webstore, we need to make sure Web Store Context is also selected see screen shot below



New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - While in Edit mode create a New State for Pending Submit for Approval
 - Drag a transition arrow from Set Defaults to Pending Submit for Approval



New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Pending Submit for Approval - State

Workflow State

Save Cancel Change ID Actions

WORKFLOW
Create Vendor from New Vendor Setup Form

NAME *
Pending Submit for Approval

ID
workflowstate98

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

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	RECCURENCE	UNIT	ACTIVE
workflowaction351	Add Button	Label: Submit for Approval	Before Record Load	Selected All	Selected 37 of 39	Approval Status = Pending Submit For Approval						<input checked="" type="checkbox"/>

Workflow Action

Save Cancel Make Copy Change ID Actions

Basic Information

WORKFLOW
Create Vendor from New Vendor Setup Form

STATE
Pending Submit for Approval

TYPE
Add Button

ID
workflowaction351

INSERT BEFORE
- Unchanged -

TRIGGER ON
Before Record Load

EVENT TYPES
Copy
Create
Edit

Selected All

CONTEXTS
Action
Bank Connectivity
Bank Statement Parser

Selected 37 of 39

INACTIVE

Parameters

LABEL *
Submit for Approval

SAVE RECORD FIRST

CHECK CONDITION BEFORE EXECUTION

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION
Approval Status = Pending Submit For Approval

Open

Workflow Condition

Save Cancel Actions

USE EXPRESSIONS

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

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow

- Next while in edit mode create a New State and call it Pending Approval
- Drag an arrow from Pending Submit for Approval to Pending Approval
- Once have arrow connecting Pending Submit for Approval to Pending Approval, double click on the arrow so we can add a Transition condition

The screenshot displays a workflow configuration interface. On the left, a vertical flowchart shows three steps: 'START' (indicated by a downward arrow), 'Set Defaults', and 'Pending Submit for Approval'. A yellow arrow points from 'Pending Submit for Approval' down to a box labeled 'Pending Approval'. A red arrow points from this yellow arrow to the 'Workflow Transition' configuration panel on the right.

The 'Workflow Transition' panel has a title bar with 'Workflow Transition' and a yellow highlight. Below the title bar are buttons for 'Save', 'Cancel', 'Change ID', and 'Actions'. The panel is divided into two main sections: 'Basic Information' and 'Condition'.

Basic Information

- WORKFLOW: Create Vendor from New Vendor Setup Form
- ID: workflowtransition270
- FROM: Pending Submit for Approval
- TO: Pending Approval
- INSERT BEFORE: - Unchanged -
- TRANSITION ON: [Empty dropdown]
- EVENT TYPES: [Empty text area]
- CONTEXTS: [List of contexts including Action, Bank Connectivity, Bank Statement Parser]

Condition

- USE: VISUAL BUILDER 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
- DELAY: [Empty text area]
- UNIT: [Empty dropdown]

Selected 37 of 39

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Pending Approval - State

Workflow State

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

WORKFLOW
Create Vendor from New Vendor Setup Form

NAME *

ID
workflowstate99

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

Actions

[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
workflowaction352	Set Field Value	Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39							✓
workflowaction353	Set Field Value	Next Approver=Dean Carazza	Entry	Selected All	Selected 37 of 39							✓
workflowaction354	Add Button	Label: Approve	Before Record Load	Selected All	Selected 37 of 39	User = Next Approver						✓
workflowaction355	Add Button	Label: Reject	Before Record Load	Selected All	Selected 37 of 39	User = Next Approver						✓
workflowaction356	Lock Record		Before Record Load	Selected All	Selected 37 of 39	User != Next Approver						✓

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Pending Approval – State
 - Set Approval Status to Pending Approval

Parameters

FIELD *

Approval Status

Value

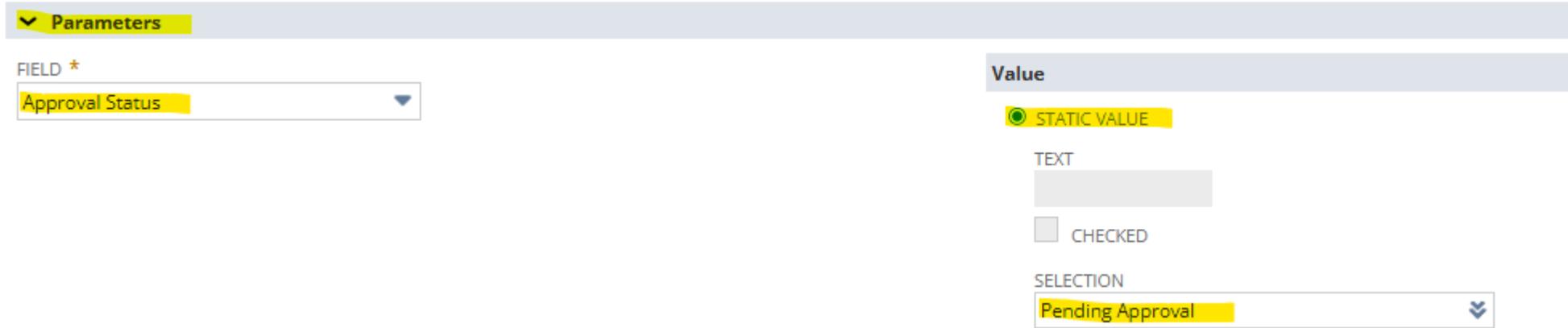
STATIC VALUE

TEXT

CHECKED

SELECTION

Pending Approval



- Set Next Approver to me

Parameters

FIELD *

Next Approver

Value

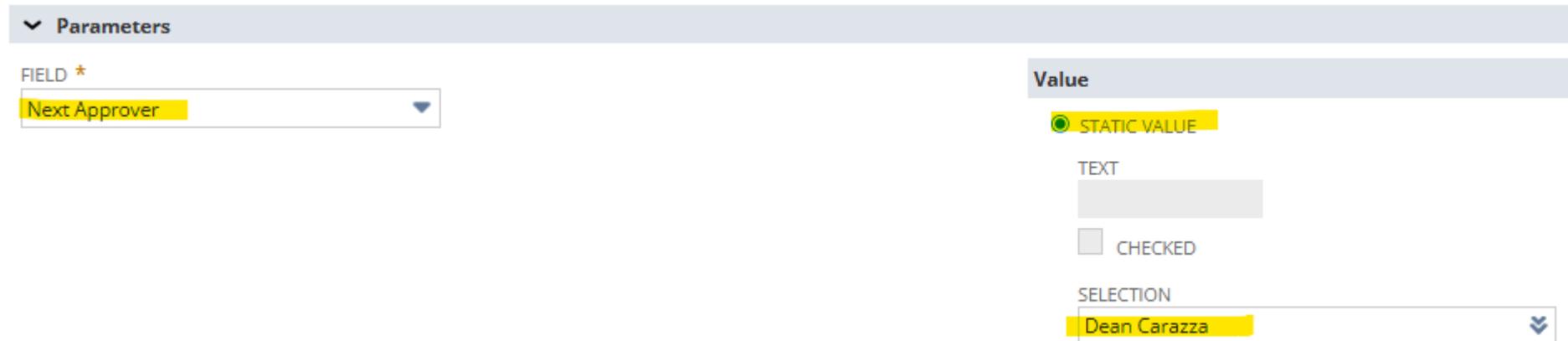
STATIC VALUE

TEXT

CHECKED

SELECTION

Dean Carazza



New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Pending Approval – State
 - Add Approve and Reject Buttons
 - › Add Approve Button with condition to show when User = Next Approver

The image displays the SAP Workflow Builder interface for configuring a workflow action. The main window is titled "Workflow Action" and contains several panels:

- Basic Information:** Shows workflow details such as "Create Vendor from New Vendor Setup Form", "STATE: Pending Approval", "TYPE: Add Button", "ID: workflowaction354", "INSERT BEFORE: - Unchanged -", "TRIGGER ON: Before Record Load", and "EVENT TYPES: Copy, Create, Edit".
- Condition:** A section for defining the button's visibility condition. It includes radio buttons for "VISUAL BUILDER" (selected) and "CUSTOM FORMULA". A text box contains the condition "User = Next Approver". Below it is a "SAVED SEARCH CONDITION" dropdown.
- Parameters:** A section for defining the button's label and behavior. It includes a "LABEL" field with the value "Approve" and checkboxes for "SAVE RECORD FIRST" (unchecked) and "CHECK CONDITION BEFORE EXECUTION" (checked).

Red arrows indicate the flow of configuration: from the "Condition" field in the main window to a detailed view of the condition, and from the "Open" button in that view to the "Workflow Condition" table below.

The detailed view shows the condition "User = Next Approver" with a checkmark icon and an "Open" button.

The "Workflow Condition" table below shows the configuration for the condition:

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

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow

- Pending Approval – State
 - Add Approve and Reject Buttons
 - › Add Reject Button with condition to show when User = Next Approver

Workflow Action

Save Cancel Make Copy Change ID Actions

Basic Information

WORKFLOW
Create Vendor from New Vendor Setup Form

STATE
Pending Approval

TYPE
Add Button

ID
workflowaction355

INSERT BEFORE
- Unchanged -

TRIGGER ON
Before Record Load

EVENT TYPES
Copy
Create
Edit

Selected All

CONTEXTS
Action
Bank Connectivity
Bank Statement Parser

Selected 37 of 39

INACTIVE

Parameters

LABEL *
Reject

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

User = Next Approver

SAVED SEARCH CONDITION

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

User = Next Approver

Open

Workflow Condition

Save Cancel Actions

USE EXPRESSIONS

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

SAVE RECORD FIRST

CHECK CONDITION BEFORE EXECUTION

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow

- Pending Approval – State
 - Lock the Record while in Pending Approval State if user is not same as the next approver

Workflow Action

Save Cancel Make Copy Change ID Actions

Basic Information

WORKFLOW
Create Vendor from New Vendor Setup Form

STATE
Pending Approval

TYPE
Lock Record

ID
workflowaction356

INSERT BEFORE
- Unchanged -

TRIGGER ON
Before Record Load

EVENT TYPES
Copy
Create
Edit

Selected All

CONTEXTS
Action
Bank Connectivity
Bank Statement Parser

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION
User != Next Approver

SAVED SEARCH CONDITION

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION
User != Next Approver

Open

Workflow Condition

Save Cancel Actions

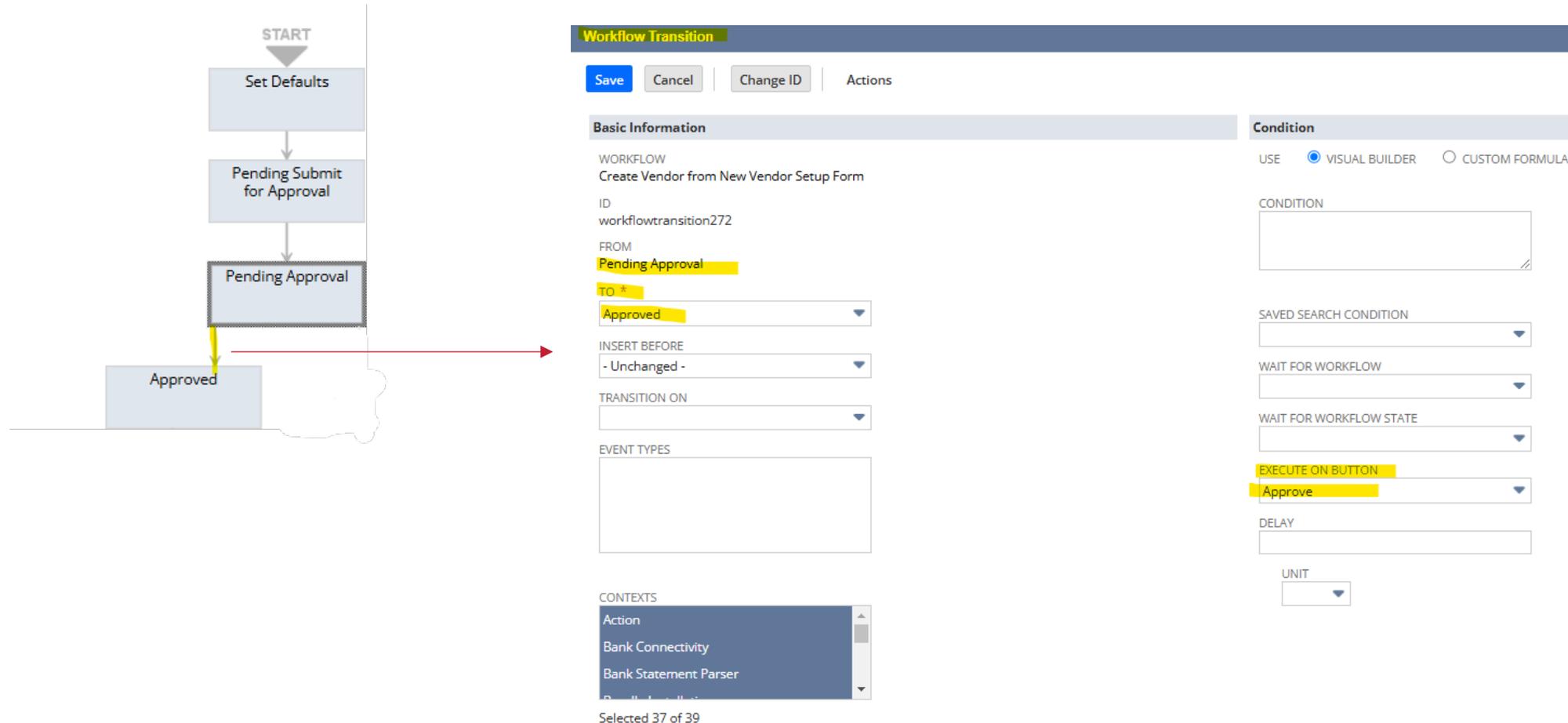
USE EXPRESSIONS

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

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow

- Next while in edit mode create a new state called Approved
- Draw a transition arrow from the Pending Approval State to the Approved State
- Double click on the transition arrow connecting Pending Approval to Approved to add a transition condition so only moves to approval state on the click of the Approve button



New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Approved - State

Workflow State

Save Cancel Change ID Actions

WORKFLOW
Create Vendor from New Vendor Setup Form

NAME *
Approved

ID
workflowstate100

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

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
workflowaction357	Set Field Value	Approval Status=Approved	Entry	Selected All	Selected 37 of 39							✓
workflowaction358	Lock Record		Before Record Load	Selected All	Selected 37 of 39	User Role != Administrator						✓

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow

- Approved - State

▪ Set Field Value

- › Set Approval Status to Approved when enters this state

Parameters

FIELD *
Approval Status

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
Approved

▪ Lock the Record once has been approved except for users with administrator role

Workflow Action

Save Cancel Make Copy Change ID Actions

Basic Information

WORKFLOW
Create Vendor from New Vendor Setup Form

STATE
Approved

TYPE
Lock Record

ID
workflowaction358

INSERT BEFORE
- Unchanged -

TRIGGER ON
Before Record Load

EVENT TYPES
Copy
Create
Edit

Selected All

CONTEXTS
Action
Bank Connectivity
Bank Statement Parser

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION
User Role != Administrator

SAVED SEARCH CONDITION

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION
User Role != Administrator

Open

Workflow Condition

Save Cancel Actions

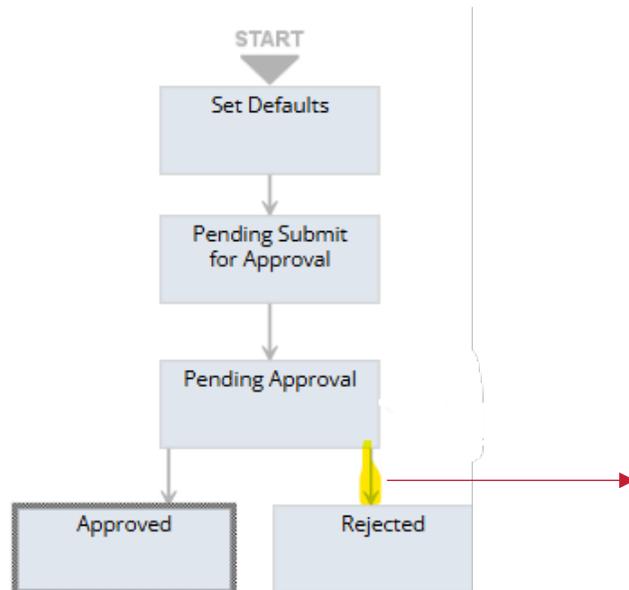
USE EXPRESSIONS

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

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow

- Next while in Edit mode, create a New State called Rejected
- Draw a Transition arrow from Pending Approval to Rejected
- Double click on arrow connecting Pending Approval to Rejected and add a condition to only transition on the click of the Rejected Button



Workflow Transition

Save Cancel Change ID Actions

Basic Information

WORKFLOW
Create Vendor from New Vendor Setup Form

ID
workflowtransition273

FROM
Pending Approval

TO *
Rejected

INSERT BEFORE
- Unchanged -

TRANSITION ON

EVENT TYPES

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

SAVED SEARCH CONDITION

WAIT FOR WORKFLOW

WAIT FOR WORKFLOW STATE

EXECUTE ON BUTTON
Reject

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Rejected - State

Workflow State

Save

Cancel

Change ID

Actions

WORKFLOW

Create Vendor from New Vendor Setup Form

NAME *

Rejected

ID

workflowstate101

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

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
workflowaction360	Set Field Value	Approval Status=Rejected	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>
workflowaction361	Add Button	Label: Resubmit for Approval	Before Record Load	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow

- Rejected - State

- Set Field Value to Rejected upon entering this state

Parameters

FIELD *
Approval Status

Value

STATIC VALUE

TEXT

CHECKED

SELECTION
Rejected

- Add Button to show option to Resubmit for Approval

Workflow Action

Save Cancel Make Copy Change ID Actions

Basic Information

WORKFLOW
Create Vendor from New Vendor Setup Form

STATE
Rejected

TYPE
Add Button

ID
workflowaction361

INSERT BEFORE
- Unchanged -

TRIGGER ON
Before Record Load

EVENT TYPES
Copy
Create
Edit
Selected All

CONTEXTS
Action
Bank Connectivity
Bank Statement Parser
Selected 37 of 39

INACTIVE

Parameters

LABEL *
Resubmit for Approval

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

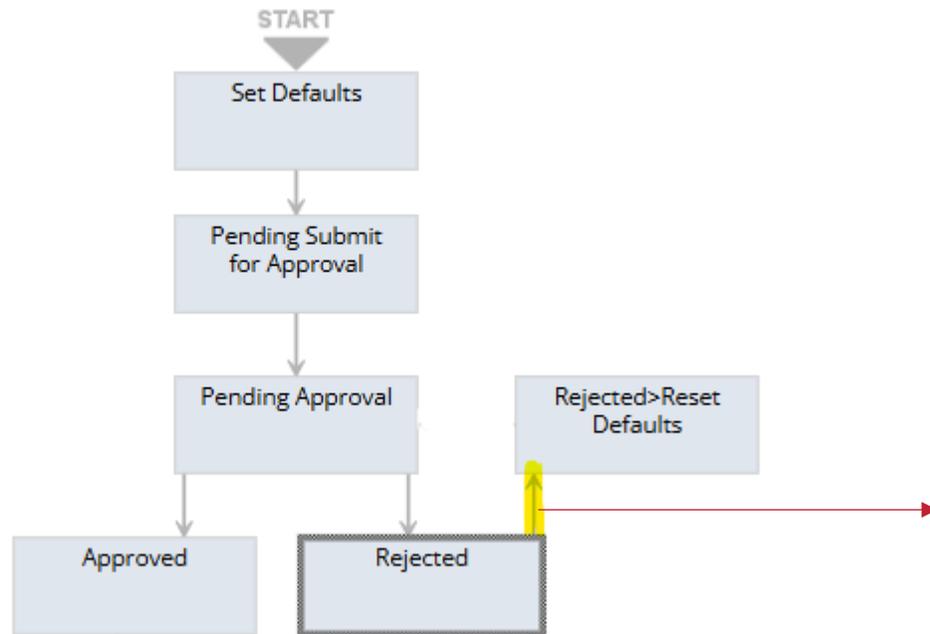
SAVED SEARCH CONDITION

SAVE RECORD FIRST

CHECK CONDITION BEFORE EXECUTION

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Next, while in edit mode create another state called Rejected>Reset Defaults
 - Draw transition arrow from Rejected to Rejected>Reset Defaults
 - Double click on Transition arrow connecting Rejected to Rejected>Reset Defaults and add a condition to only transition to Rejected>Reset Defaults on clicking the Rejected Button



The screenshot shows the 'Workflow Transition' configuration interface. The title bar is 'Workflow Transition'. Below the title bar are buttons for 'Save', 'Cancel', 'Change ID', and 'Actions'. The interface is divided into two main sections: 'Basic Information' and 'Condition'.

Basic Information

- WORKFLOW: Create Vendor from New Vendor Setup Form
- ID: workflowtransition274
- FROM: Rejected
- TO: Rejected>Reset Defaults
- INSERT BEFORE: - Unchanged -
- TRANSITION ON: [Empty dropdown]
- EVENT TYPES: [Empty text area]

Condition

- USE: VISUAL BUILDER 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: Resubmit for Approval

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Rejected>Reset Defaults – State

Workflow State

Save Cancel Change ID Actions

WORKFLOW
Create Vendor from New Vendor Setup Form

NAME *
Rejected>Reset Defaults

ID
workflowstate102

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

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
workflowaction362	Set Field Value	Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>

- Set Approval Status back to Pending Approval upon entering this state

Parameters

FIELD *
Approval Status

Value

STATIC VALUE

TEXT

CHECKED

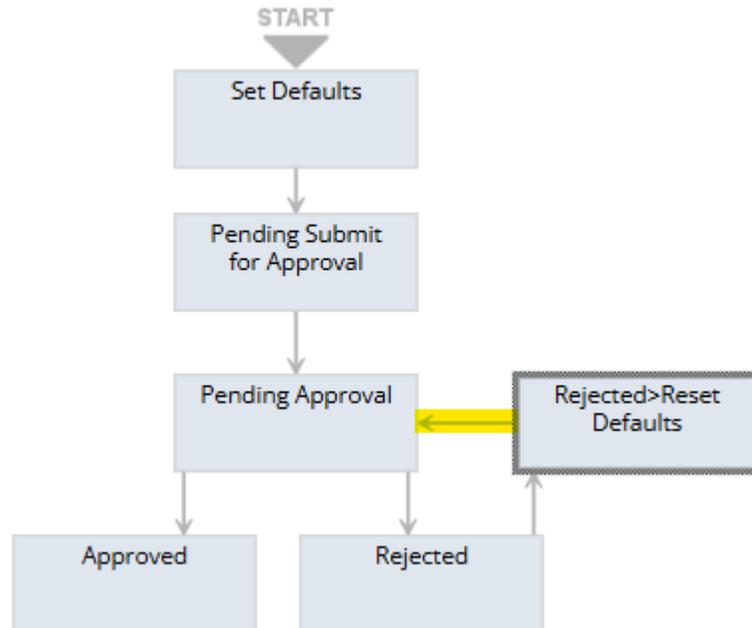
SELECTION

Pending Approval

New Vendor Setup Request Online Form and Approval Workflow

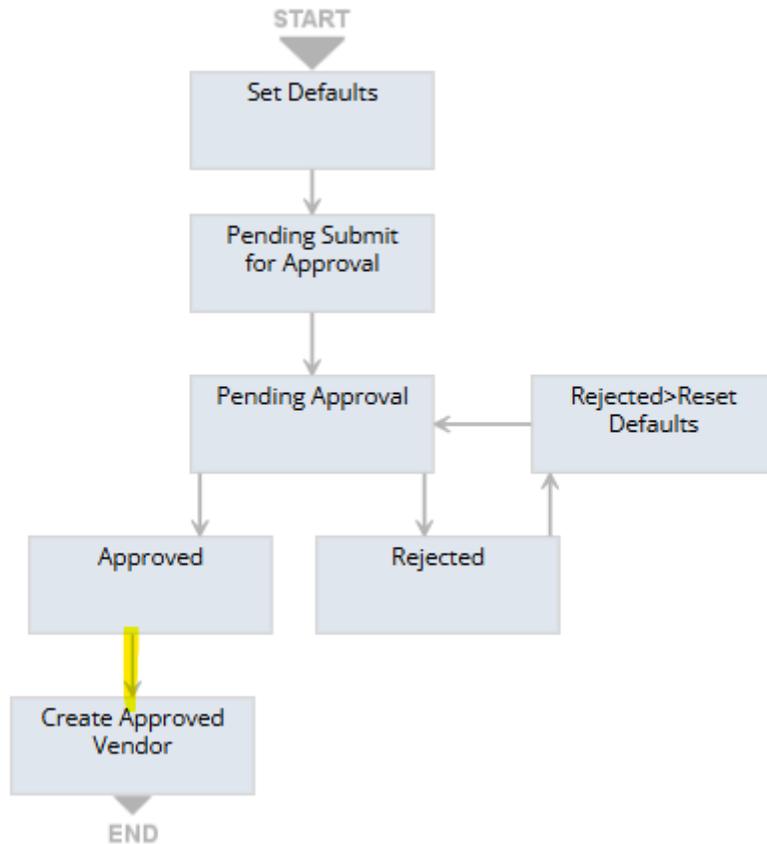
1. Create Approval and Approved Vendor Creation Workflow

- Next, we can draw a transition arrow from Rejected>Reset Defaults to Pending Approval
- Note, this transition just needs to be drawn to connect these states, no condition on transition is needed



New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Next, while in edit mode create another state called Create Approved Vendor
 - Draw a transition arrow from Approved to Create Approved Vendor
 - Note this transition doesn't need any conditions



New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Create Approved Vendor – State
 - Note as this is the desired last state/end of our workflow want to check the Do Not Exit Workflow

Workflow State

Save Cancel Change ID Actions

WORKFLOW
Create Vendor from New Vendor Setup Form

NAME *
Create Approved Vendor

ID
workflowstate103

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

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
:: workflowaction363	Create Record	Vendor (Into Vendor)	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Create Approved Vendor – State
 - Create a Vendor Record upon entering this state

Workflow Action

Save Cancel Make Copy Change ID Actions

Basic Information

WORKFLOW
Create Vendor from New Vendor Setup Form

STATE
Create Approved Vendor

TYPE
Create Record

ID
workflowaction363

INSERT BEFORE
- Unchanged -

TRIGGER ON
Entry

EVENT TYPES
Approve
Cancel
Copy

Selected All

CONTEXTS
Action
Bank Connectivity
Bank Statement Parser

Selected 37 of 39
 INACTIVE

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

SAVED SEARCH CONDITION

Schedule

USE DELAY TIME OF DAY

DELAY

START TIME

RECURRENCE

UNIT

Parameters

RECORD TYPE *
Vendor

STORE RESULT IN
Vendor

Parameters

RECORD TYPE *
Vendor

STORE RESULT IN
Vendor

FIELD *	TEXT	CHECKED	DATE	SELECTION	JOIN	VALUE FIELD	FORMULA
Company Name						Company Name	
E-mail							
Terms						Terms	
Web Address						Website	
Phone						Phone Number	
Subsidiary				US West			
New Vendor Setup Request				Current Record			
Comments						Comments	

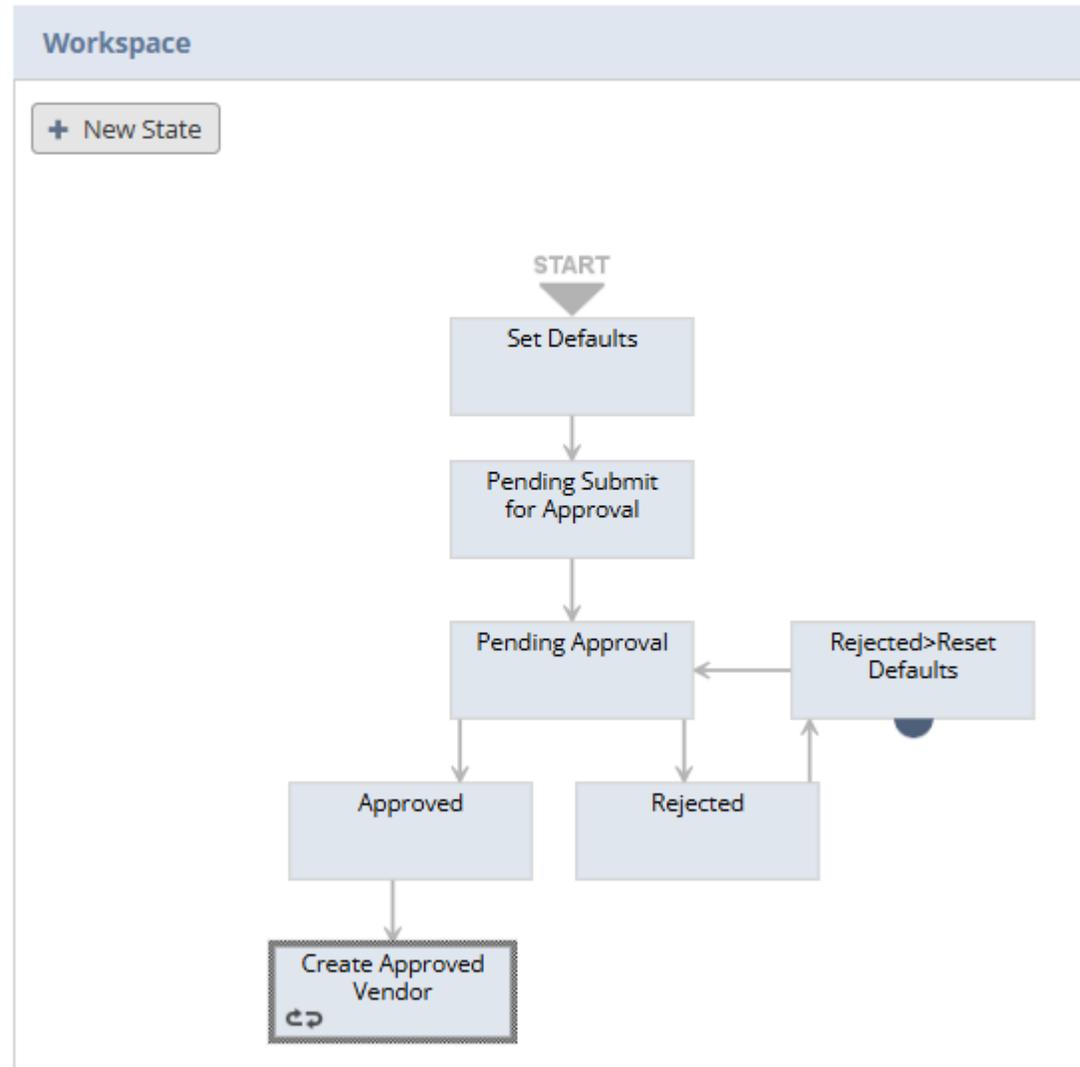
Note, by setting New Vendor Setup Request Field we created on the Vendor Record/Form to Current Record means it will store a link to the New Vendor Request that created the Vendor Record

Note – for demo update this Entity Field to point to version of record demoing

New Vendor Setup Request Online Form and Approval Workflow

1. Create Approval and Approved Vendor Creation Workflow
 - Now that we have finished creating our workflow here is what the finished workflow looks like

Workflow: Create Vendor from New Vendor Setup Form



New Vendor Setup Request Online Form and Approval Workflow

2. Test the Workflow

- Now that we have finished our workflow we should test the workflow to see if working as expected. We will perform the following Test
 - **** Note release the workflow before testing, because while workflow is in testing mode only runs for you the owner, but the online form creates records as system with a context of web store.
 - **** Note you must put the Workflow in to View Mode before testing.
1. Create a New Vendor Request using the online form we created
 2. Should see the button and option to Submit for Approval
 3. We should have the option to approve or reject the New Vendor Request
 4. Upon Approval of the New Vendor Request it should automatically create a Vendor Record and have the link to the New Vendor Request form that Vendor was created from

What follows are the screen shots for the steps above

New Vendor Setup Request Online Form and Approval Workflow

2. Test the Workflow

- Now that we have finished our workflow we should test the workflow to see if working as expected. We will perform the following Test
 - ******Note you must put the Workflow in to View Mode before testing.**
1. Create a New Vendor Request using the online form we created

sv scalenorth
New Vendor Setup Request Form
Submit

General Information

* Company Name Test Run Vendor
* Website http://scalenorth.com
* Category 1099 contractor
* Email dcarazza@scalenorth.com
Phone Number
* Comments Test Run Vendor Comments

Financial Information

Terms Net 30

Once you submit this form, one of our Accounts Payable Representative's will review this request and approve or reject accordingly. Please contact AP@email.com if you have any questions or concerns on this request. Thanks.

New Vendor Setup Request

17

Edit Back Submit for Approval Actions

NAME
17
 INACTIVE
COMPANY NAME
Test Run Vendor
COMMENTS
Test Run Vendor Comments

APPROVAL STATUS
Pending Submit For Approval
NEXT APPROVER
VENDOR
SCRIPT ID
val_329262_td2928790_225

General Information Financial Information Notes Files Workflow

WEBSITE
http://scalenorth.com
EMAIL
dcarazza@scalenorth.com

PHONE NUMBER
CATEGORY
1099 contractor

New Vendor Setup Request Online Form and Approval Workflow

2. Test the Workflow

- Now that we have finished our workflow we should test the workflow to see if working as expected. We will perform the following Test
 - ******Note you must put the Workflow in to View Mode before testing.**
- ### 2. Should see the button and option to Submit for Approval

New Vendor Setup Request

17

[Edit](#) [Back](#) [Submit for Approval](#) [Print](#) [Refresh](#) [Actions](#)

NAME
17
 INACTIVE
COMPANY NAME
Test Run Vendor
COMMENTS
Test Run Vendor Comments

APPROVAL STATUS
Pending Submit For Approval
NEXT APPROVER

VENDOR

SCRIPT ID
val_329262_td2928790_225

[General Information](#) [Financial Information](#) [Notes](#) [Files](#) [Workflow](#)

WEBSITE
http://scalenorth.com
EMAIL
dcarazza@scalenorth.com

PHONE NUMBER

CATEGORY
1099 contractor

- Upon clicking submit for Approval expect the following:
- Approval Status becomes Pending Approval
 - Next Approver will be set to Me
 - Will see Approve and Reject Buttons Available

3. We should have the option to approve or reject the New Vendor Request

New Vendor Setup Request

17

[Edit](#) [Back](#) [Approve](#) [Reject](#) [Print](#) [Refresh](#) [Actions](#)

NAME
17
 INACTIVE
COMPANY NAME
Test Run Vendor
COMMENTS
Test Run Vendor Comments

APPROVAL STATUS
Pending Approval
NEXT APPROVER
Dean Carazza
VENDOR

SCRIPT ID
val_329262_td2928790_225

[General Information](#) [Financial Information](#) [Notes](#) [Files](#) [Workflow](#)

WEBSITE
http://scalenorth.com
EMAIL
dcarazza@scalenorth.com

PHONE NUMBER

CATEGORY
1099 contractor

New Vendor Setup Request Online Form and Approval Workflow

2. Test the Workflow

- Now that we have finished our workflow we should test the workflow to see if working as expected. We will perform the following Test
 - *******Note you must put the Workflow in to View Mode before testing.***
4. Upon Approval of the New Vendor Request it should automatically create a Vendor Record and have the link to the New Vendor Request form that Vendor was created from

New Vendor Setup Request

17

[Edit](#) [Back](#) |   Actions

NAME

17

INACTIVE

COMPANY NAME

Test Run Vendor

COMMENTS

Test Run Vendor Comments

APPROVAL STATUS

Approved

NEXT APPROVER

Dean Carazza

VENDOR

Test Run Vendor

SCRIPT ID

val_329262_td2928790_225

[General Information](#) [Financial Information](#) [Notes](#) [Files](#) [Workflow](#)

WEBSITE

<http://scalenorth.com>

EMAIL

dcarazza@scalenorth.com

PHONE NUMBER

CATEGORY

1099 contractor

New Vendor Setup Request Online Form and Approval Workflow

2. Test the Workflow

- We can see the steps were successful and can even click on the link to the Vendor Record that was created showing it mapped the fields properly as well as has referenced link on Vendor back to the New Vendor Setup Request that created the Vendor

Vendor 🔍 🔄

Test Run Vendor

Edit Back Make Payment 🖨️ ↺ Actions

▼ Primary Information

VENDOR ID Test Run Vendor	ADDRESS	<input type="checkbox"/> INACTIVE
TYPE Company	PRINT ON CHECK AS	CATEGORY
COMPANY NAME Test Run Vendor	WEB ADDRESS http://scalenorth.com	<input type="checkbox"/> PROJECT RESOURCE
PRIMARY SUBSIDIARY US West		DATE CREATED 01/10/2025 6:43 am
REPRESENTS SUBSIDIARY		COMMENTS Test Run Vendor Comments
		NEW VENDOR SETUP REQUEST 17

Subsidiaries Relationships Address **Financial**

▼ Account Information

LEGAL NAME
Test Run Vendor

ACCOUNT

TERMS

Net 30

Questions?

Next Steps

- ▲ Follow me and ScaleNorth on LinkedIn. Will be posting the materials from today on our LinkedIn Group “NetSuite Made Easy”. Material from prior classes are posted out there as well. Can request to join group using link below
 - <https://www.linkedin.com/groups/14571179/>
- ▲ Will be hosting monthly with next one targeted to be Friday 02/21/25 12–1PM PST
 - Target Agenda:
 - How to Create a Dynamic Form in NetSuite
 - Dependent Dropdowns via sourcing and filtering that can be dynamically made required or shown/visible via workflow
- ▲ 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 or grab time on my calendar
 - dcarazza@scalenorth.com
 - 714–350–6211
 - <https://calendly.com/dcarazza-1>



NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

scalenorth.com

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