scalenorth

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

January 10, 2024

Confidentiality Notice

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
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

270+
Team Members

650+
NetSuite Certifications Held by Staff

$2.5B+
Annual Revenue Transactions Processed

1,300+
Years of Collective NetSuite ERP Experience

8.0+
Avg Years of NetSuite Experience

56%
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 & Managed Services

Technical Services

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

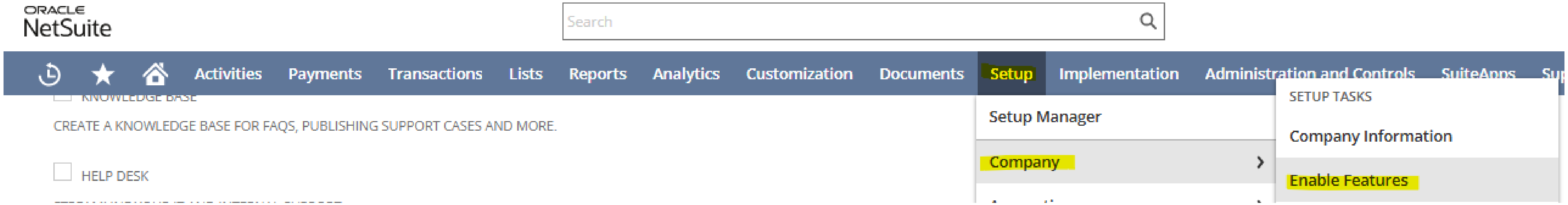
Automating Creation of Lead/Customer Using an Online Form

Creation of Lead/Customer Using an Online Form

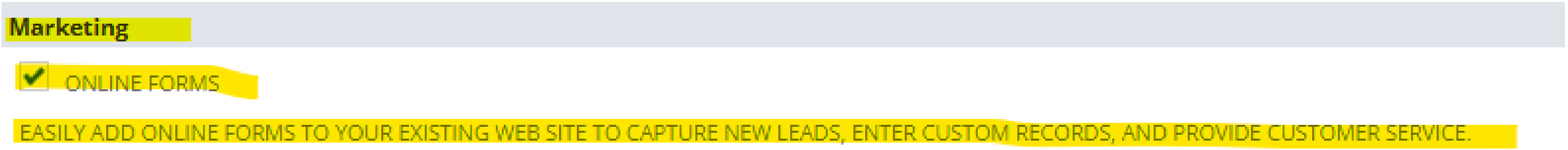
- Use Case
  - In this example, we want to setup an Online form that can be used as a way for potential customers to contact us with their inquiry so somebody from the sales department can reach out/follow up and help them with their inquiry.
  - What follows are the steps we will take to create the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

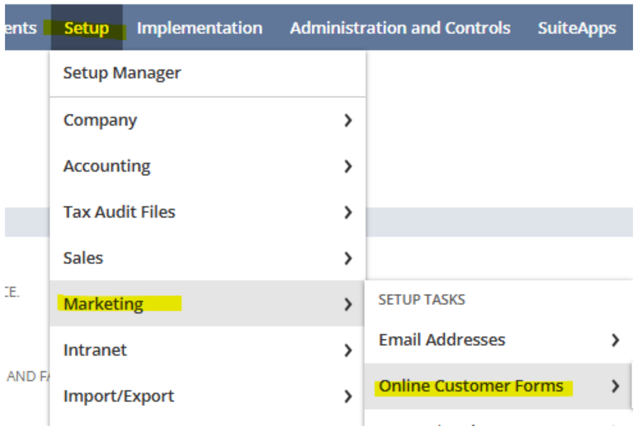


   - Make sure Online Forms is Checked

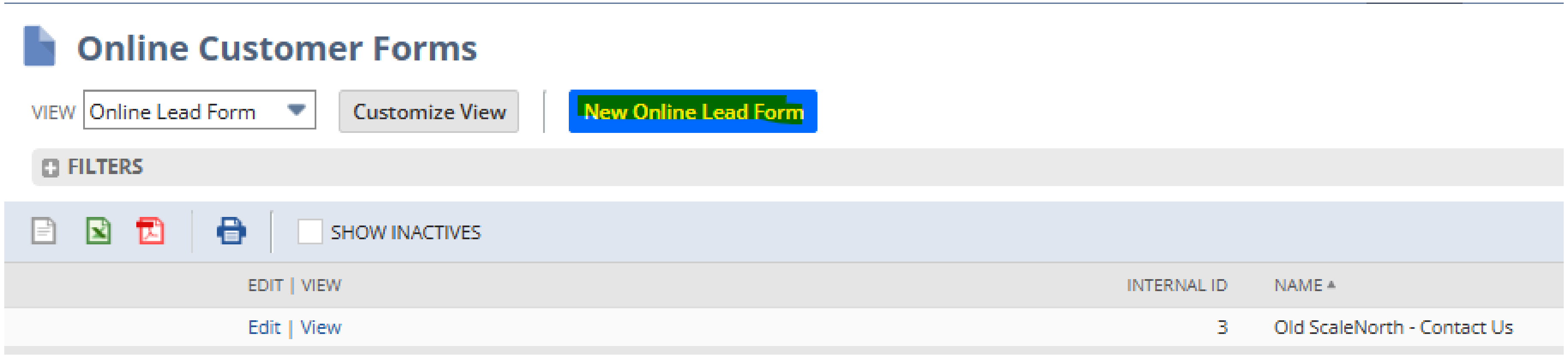


Creation of Lead/Customer Using an Online Form

2. Create an Online Form
   - Navigate to Setup>Company>Marketing>Online Forms

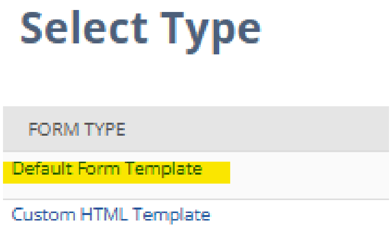


   - Click the New Online Lead Form Button

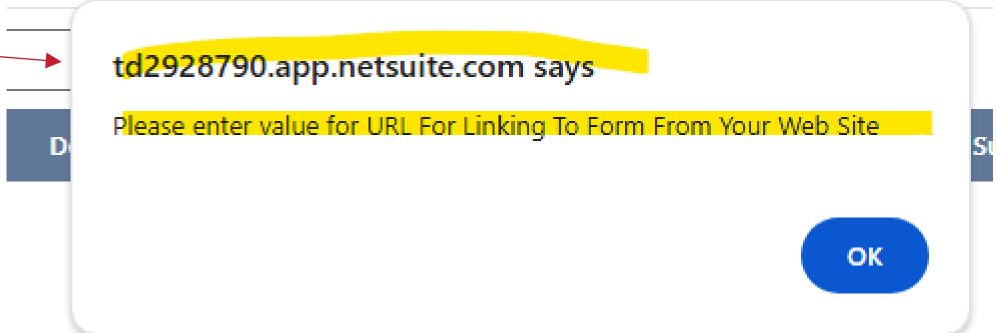


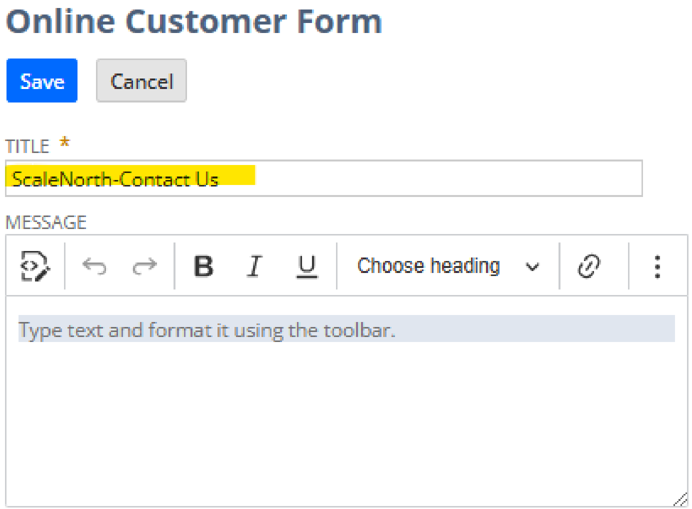
Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued
   - Select Type
     - Choose Default Form Template



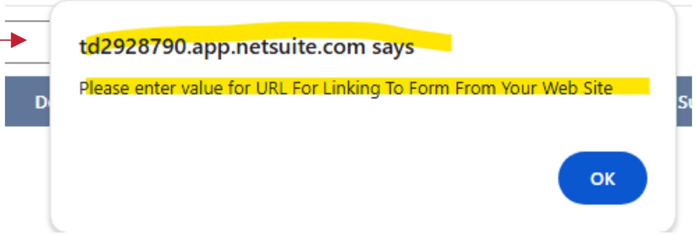
   - Title
     - Give a Title to your Form
     - *Note – Before you can save your form, you will have to provide the redirect to URL Field on the Setup Workflow Tab. Otherwise will get the following error message

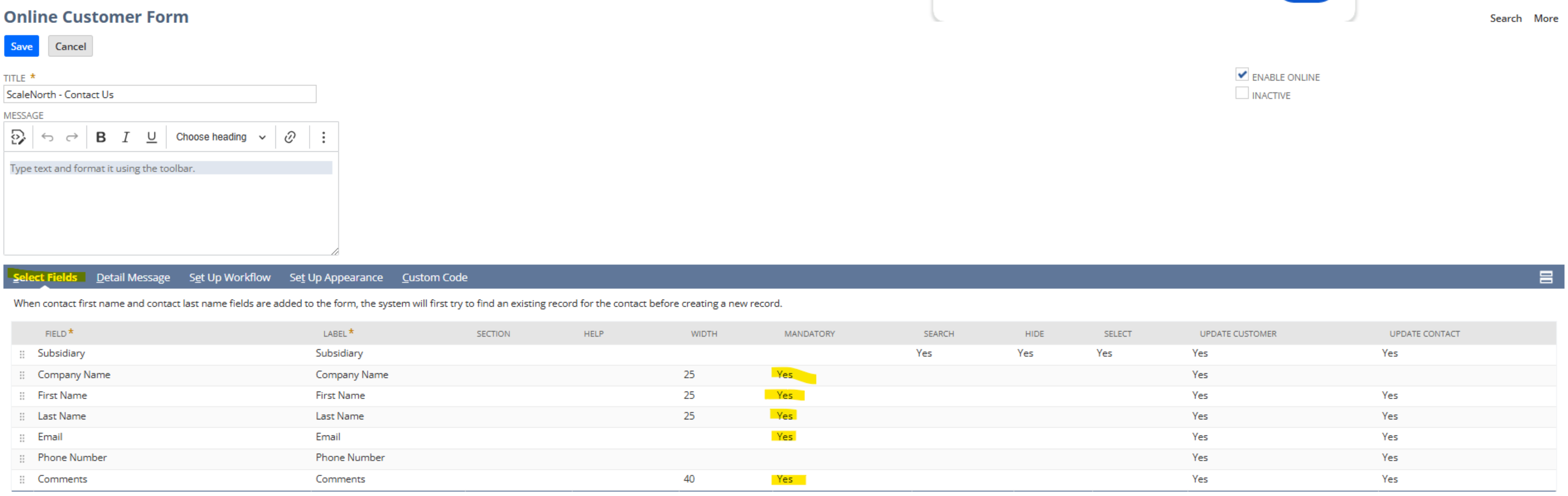




Creation of Lead/Customer Using an Online Form

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

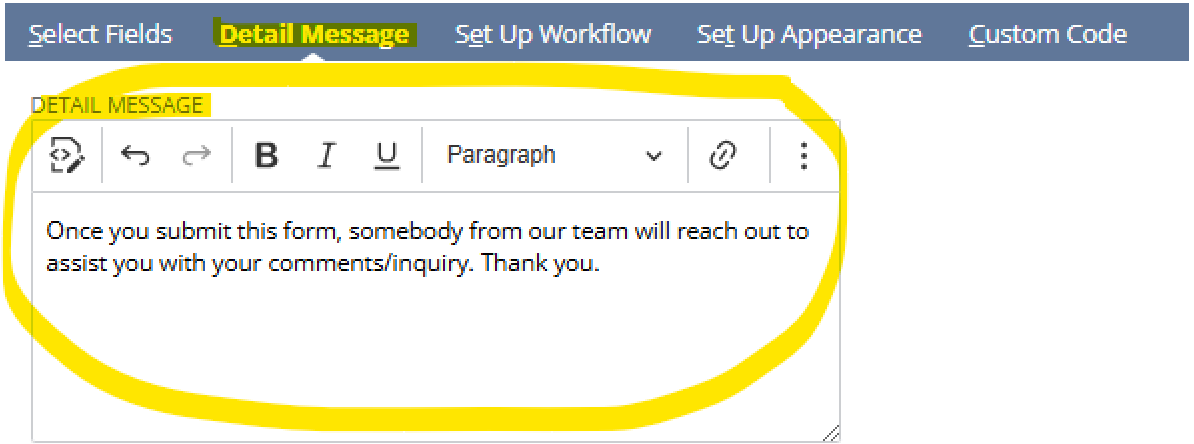




FIELD *	LABEL *	SECTION	HELP	WIDTH	MANDATORY	SEARCH	HIDE	SELECT	UPDATE CUSTOMER	UPDATE CONTACT
Subsidiary	Subsidiary					Yes	Yes	Yes	Yes	Yes
Company Name	Company Name			25	Yes				Yes	
First Name	First Name			25	Yes				Yes	Yes
Last Name	Last Name			25	Yes				Yes	Yes
Email	Email				Yes				Yes	Yes
Phone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

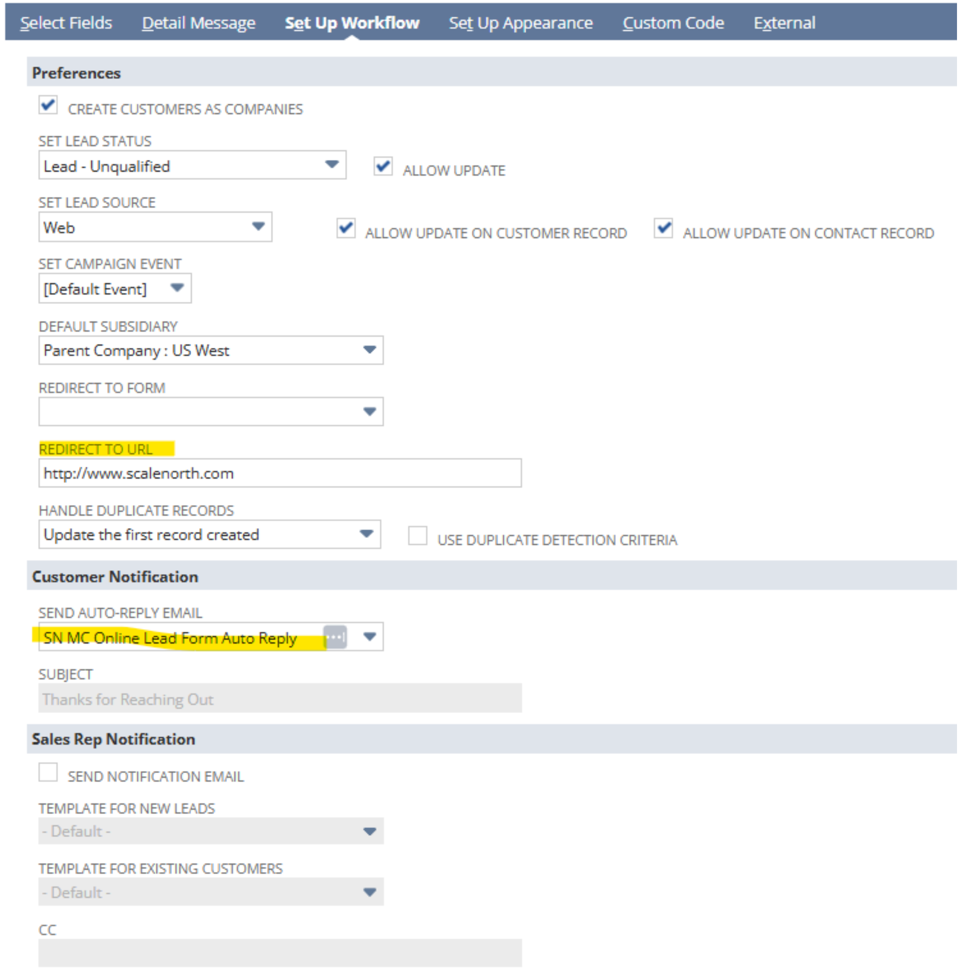
Creation of Lead/Customer Using an Online Form

2. Create an Online Form - Continued
   - Detail Message



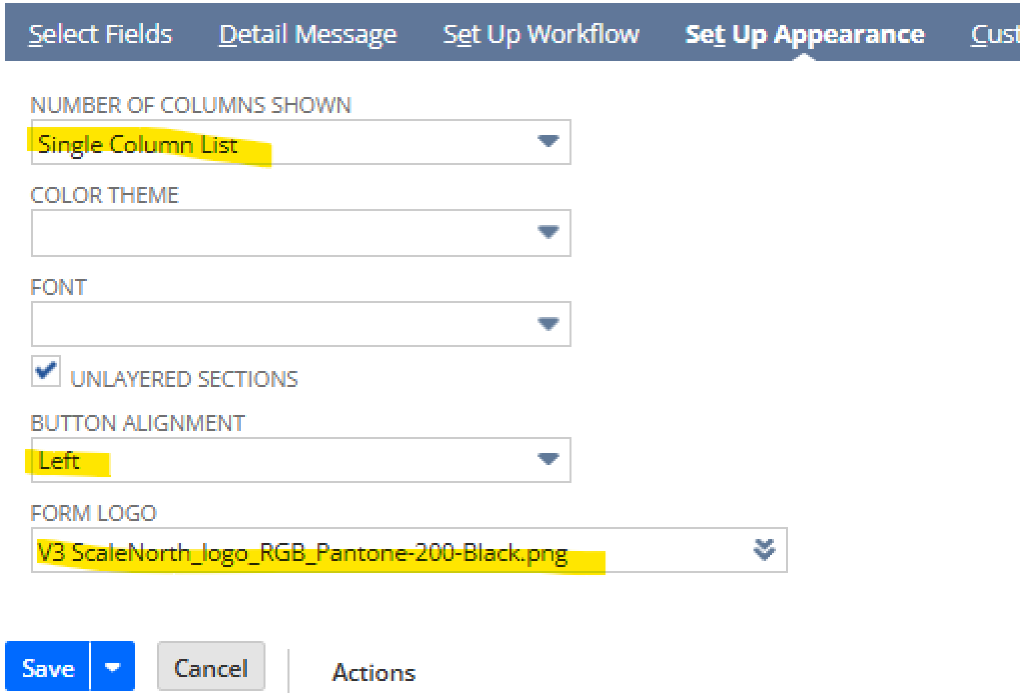
Creation of Lead/Customer Using an Online Form

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



Creation of Lead/Customer Using an Online Form

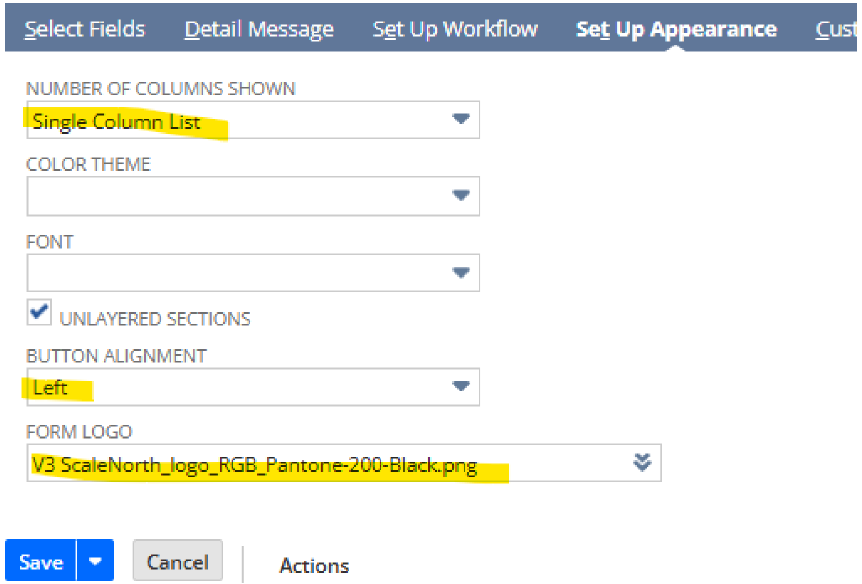
2. Create an Online Form - Continued
   - Set Up Appearance



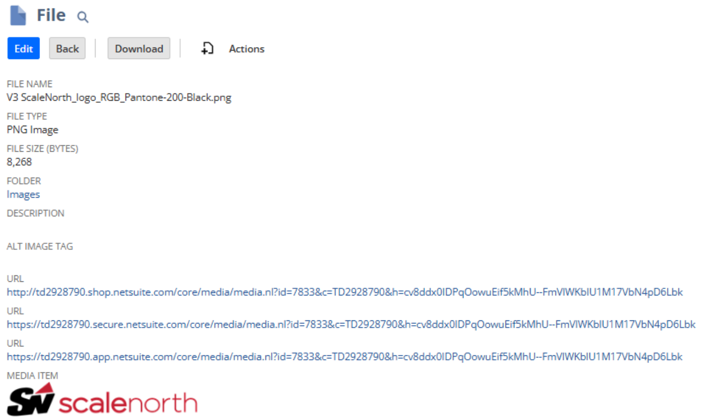
Creation of Lead/Customer Using an Online Form

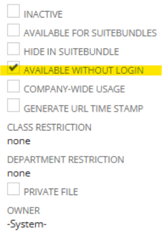
2. Create an Online Form - Continued

- Set Up Appearance



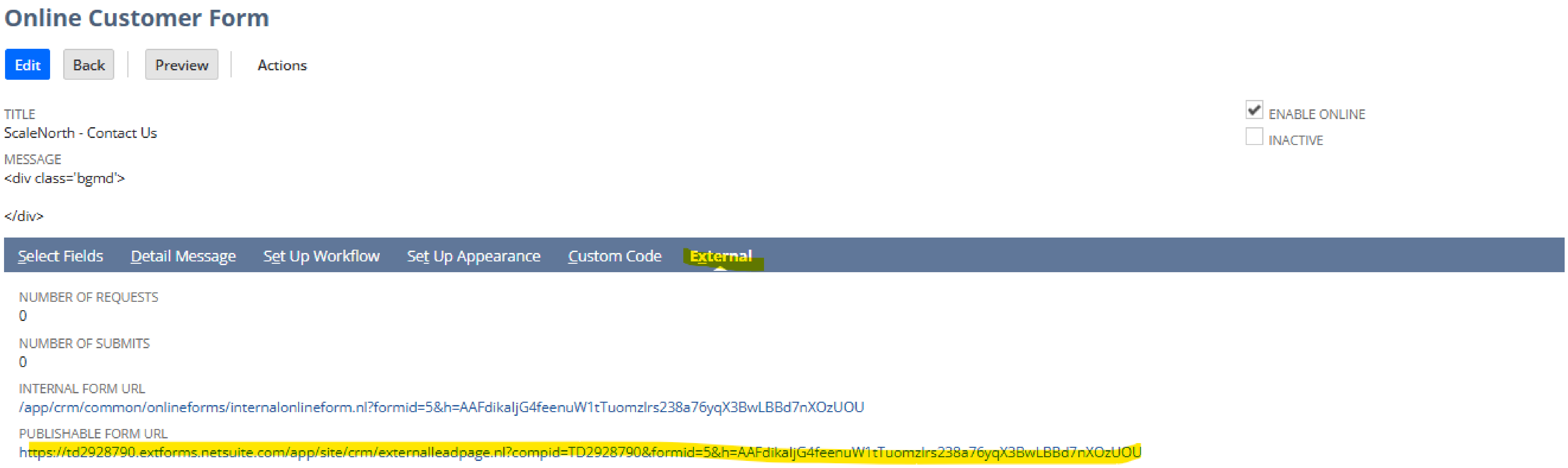
- Note, for logo to show up on form, had to check the Available without login checkbox on the file in the file cabinet





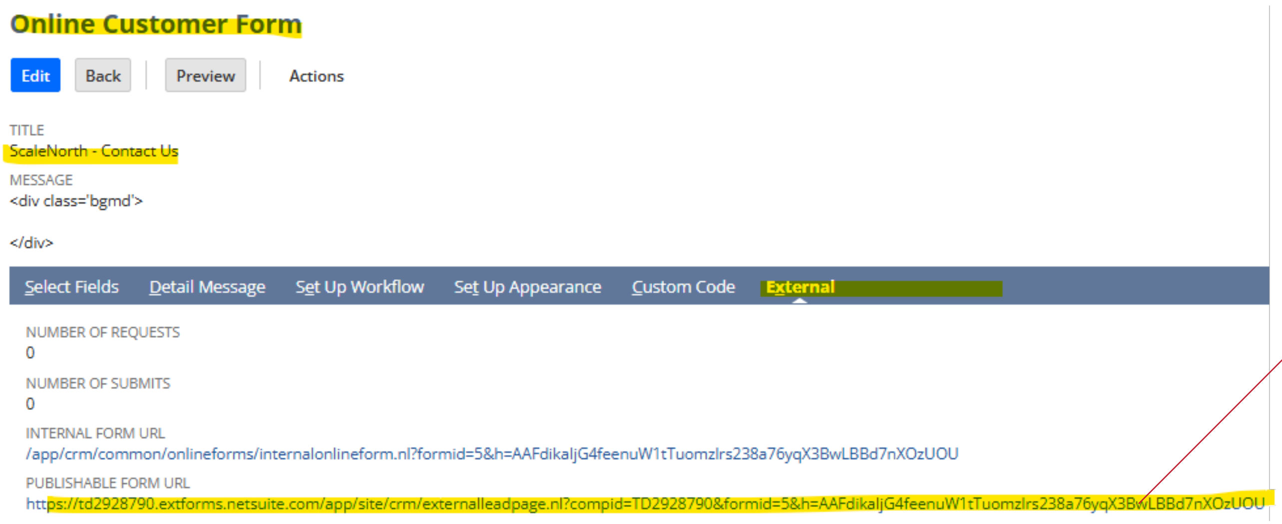
Creation of Lead/Customer Using an Online Form

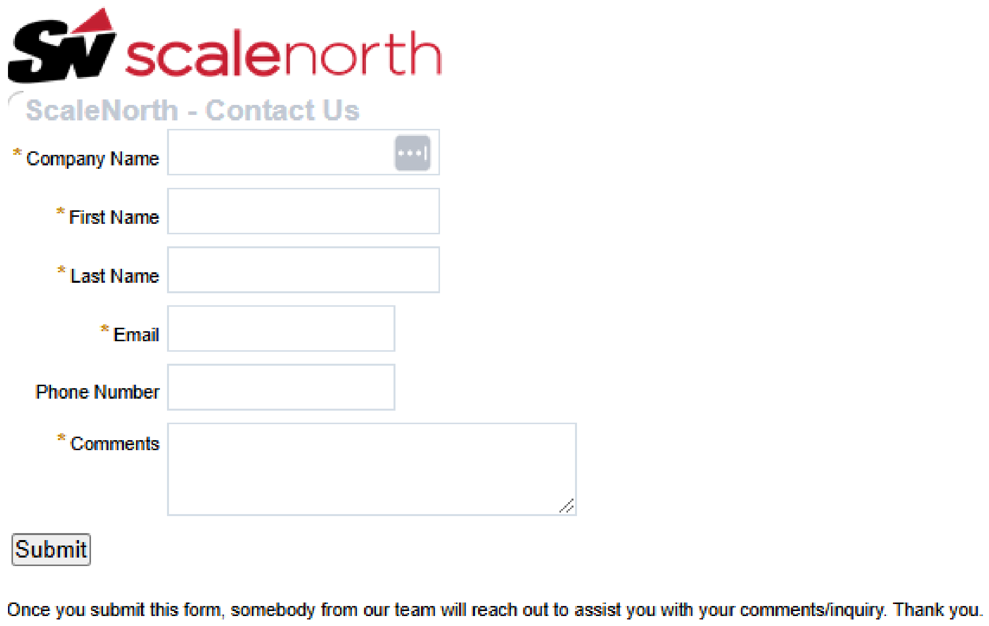
2. Create an Online Form - Continued
   - External
     - Note this is where the URL Link is for the online form you created
       - Can work with Website resource to embed on your website. If need help ScaleNorth can help if you don't have such resource.



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.

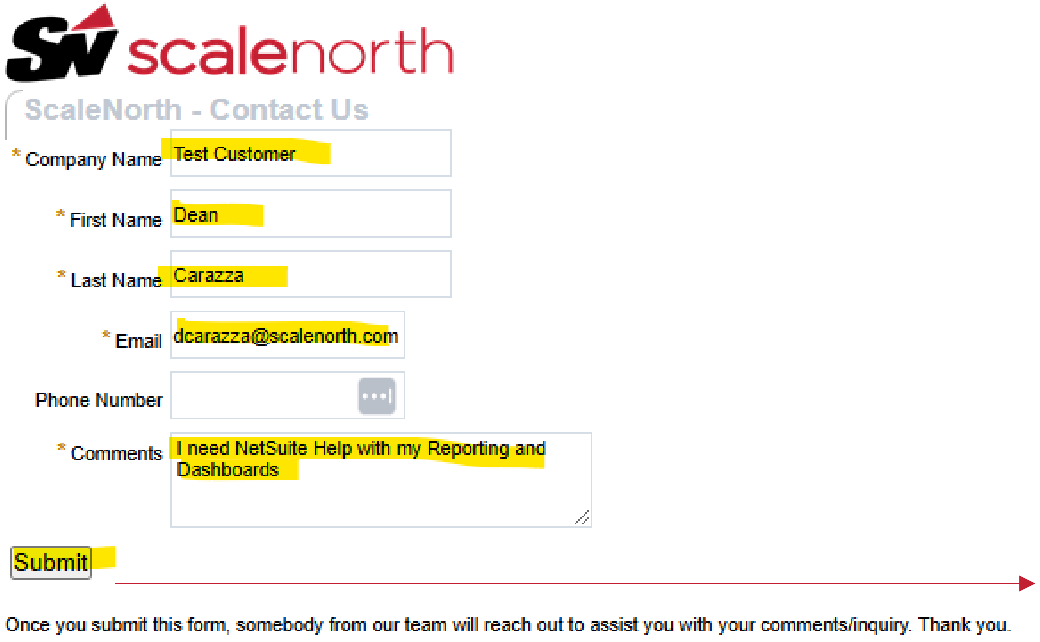


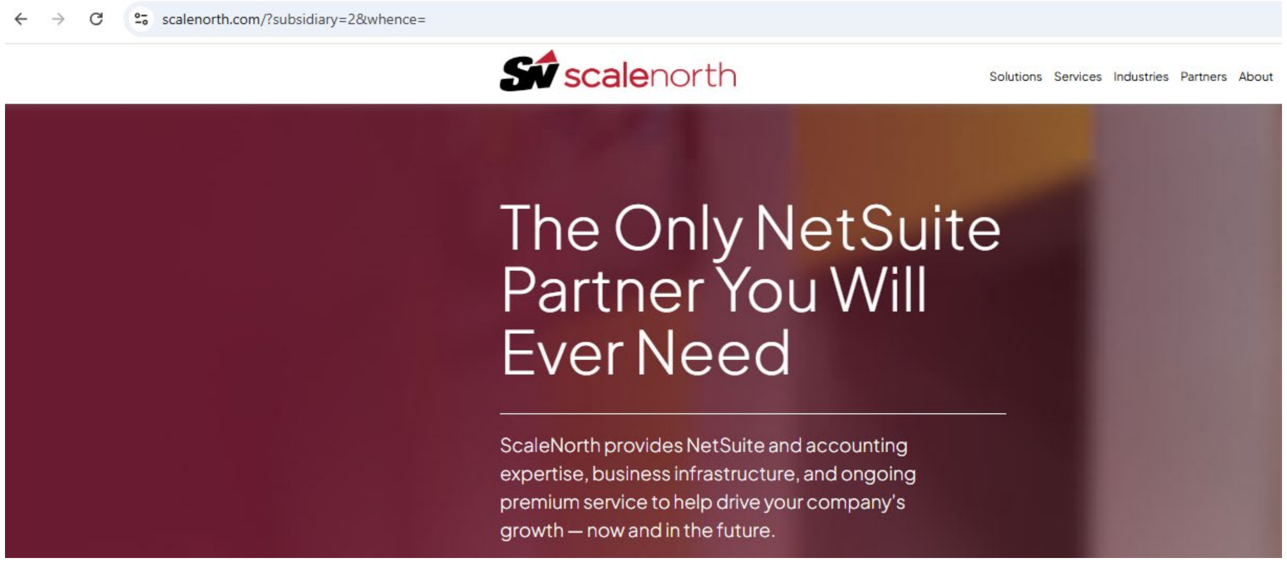


Creation of Lead/Customer Using an Online Form

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
ScaleNorth - Contact Us
* Company Name: Test Customer
* First Name: Dean
* Last Name: Carazza
* Email: dcarazza@scalenorth.com
Phone Number:
* Comments: I need NetSuite Help with my Reporting and Dashboards
Submit
Once you submit this form, somebody from our team will reach out to assist you with your comments/inquiry. Thank you.



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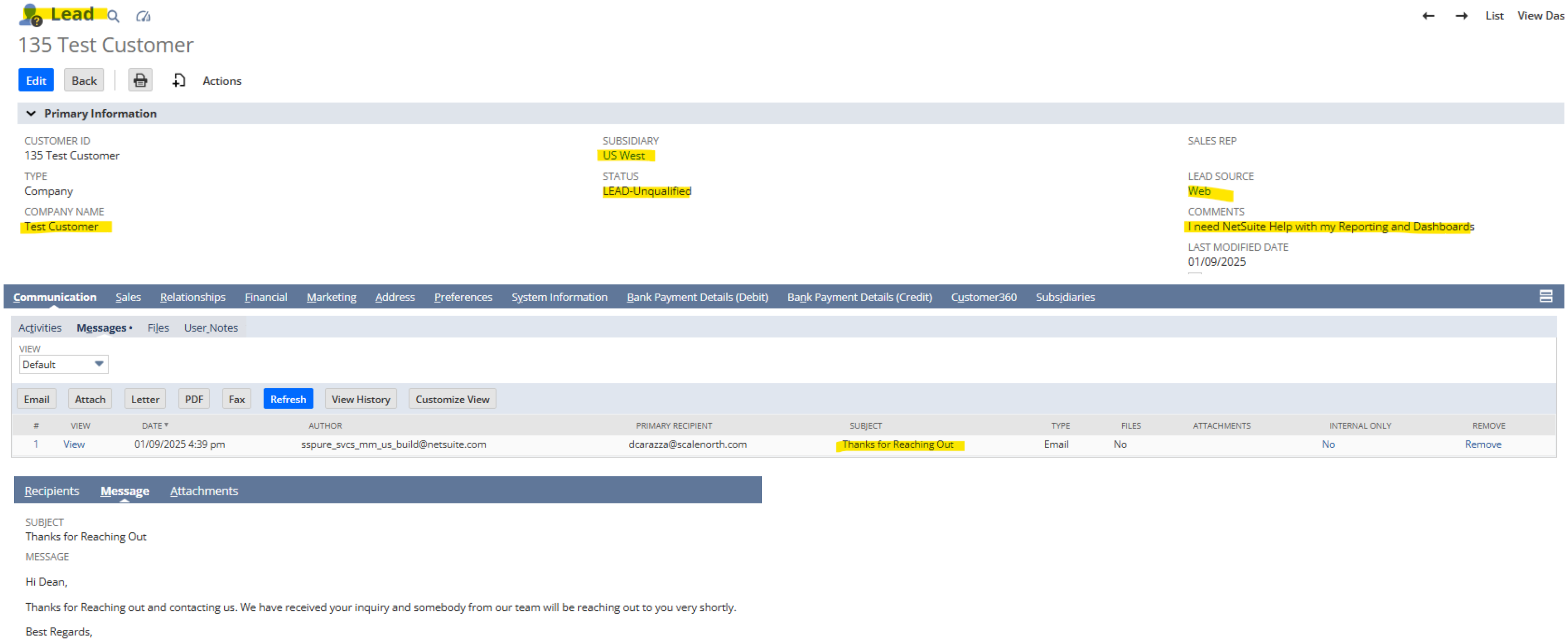


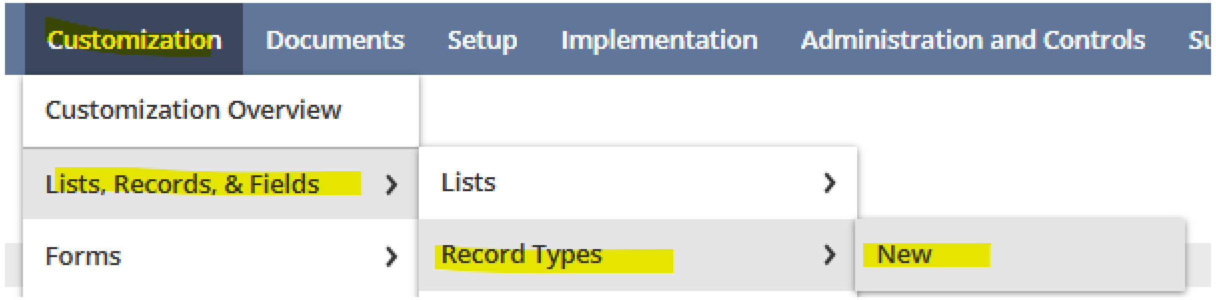
Automating a New Vendor Setup Request using a Custom Record: Online Form and Workflow to Create Vendor Record with Approval

New Vendor Setup Request Online Form and Approval Workflow

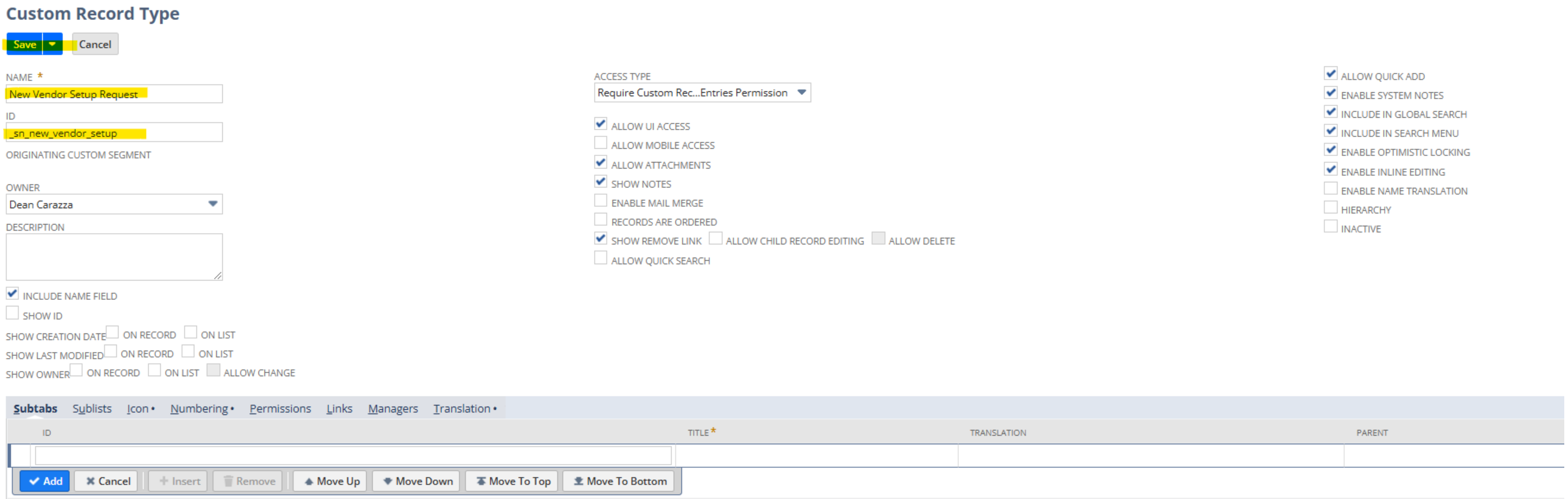
- Use Case
  - In this example, we want to create a custom record:online form for a New Vendor Request.
  - This will allow users to submit a Vendor Request using an online form
  - We can create a workflow that will allow the ability to approve/reject the New Vendor Request and add an action that will 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



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

Fields • Subtabs • Sublists Icon • Numbering • Forms • Online Forms • Permissions Links Managers Translation • Child Records Parent Records History • System Notes •

New Field

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

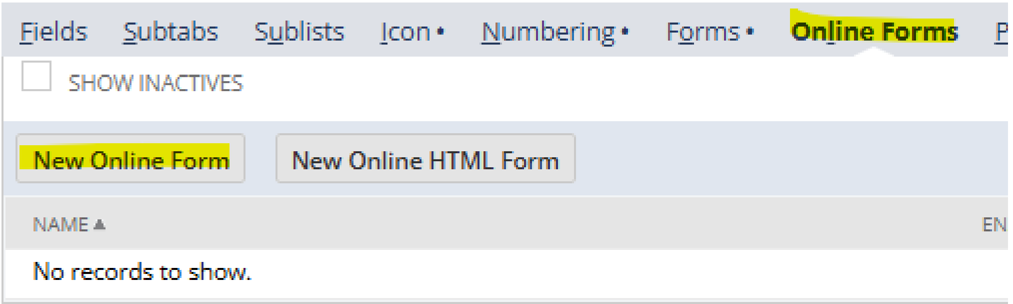
1. Create Custom Record
   - Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
   - Subtabs

Fields • **Subtabs** • Sublists Icon • Numbering • Forms • Online Forms • Permissions Links Managers Translation • Child Records Parent Records History • System Notes •

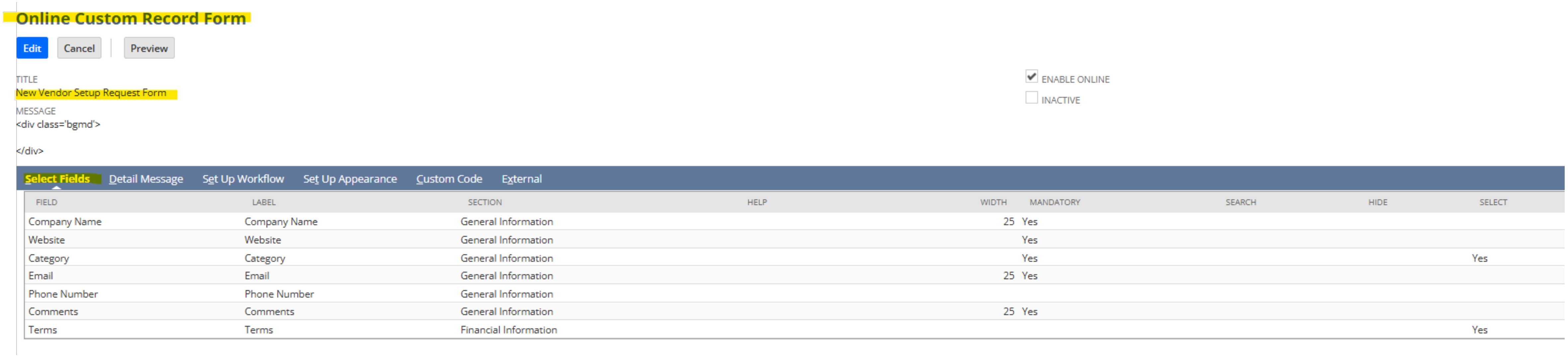
ID	TITLE	TRANSLATION	PARENT
tab_396_td2928790_430	General Information		General Information
tab_397_td2928790_759	Financial Information		Financial Information

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

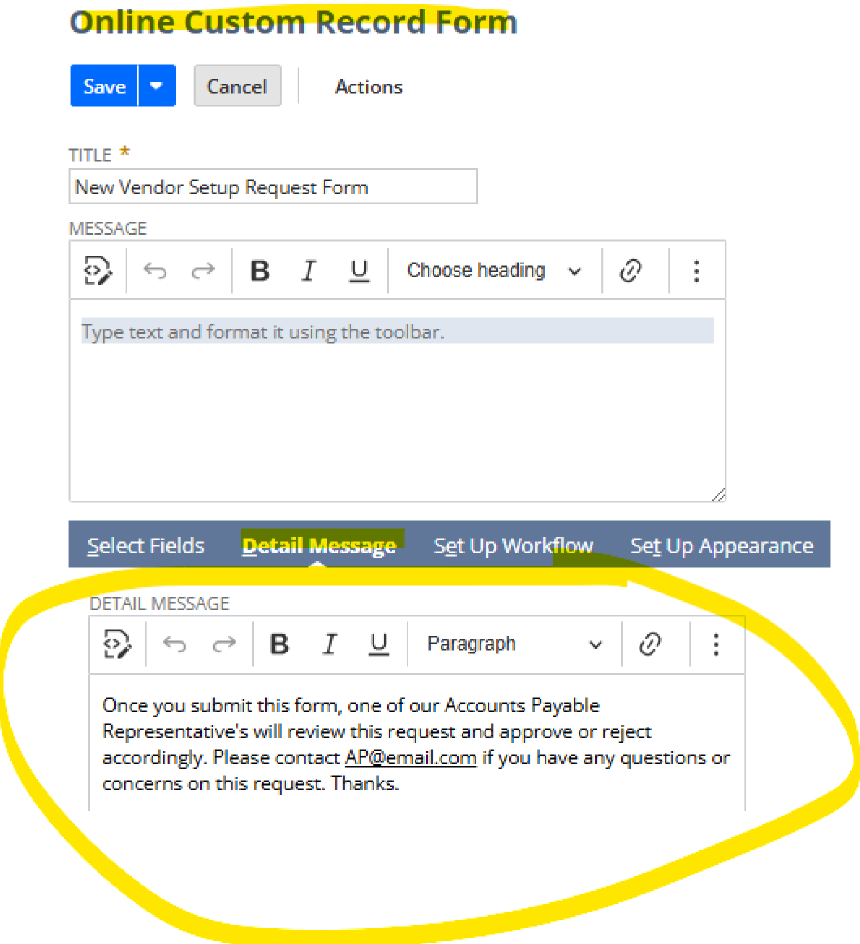


   - Online Form>Fields



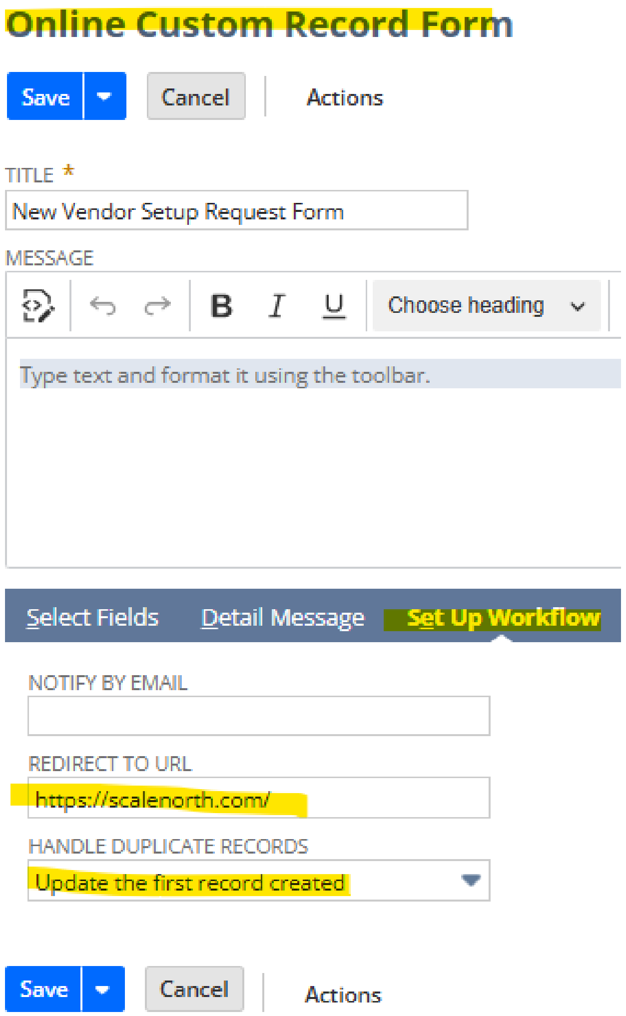
New Vendor Setup Request Online Form and Approval Workflow

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



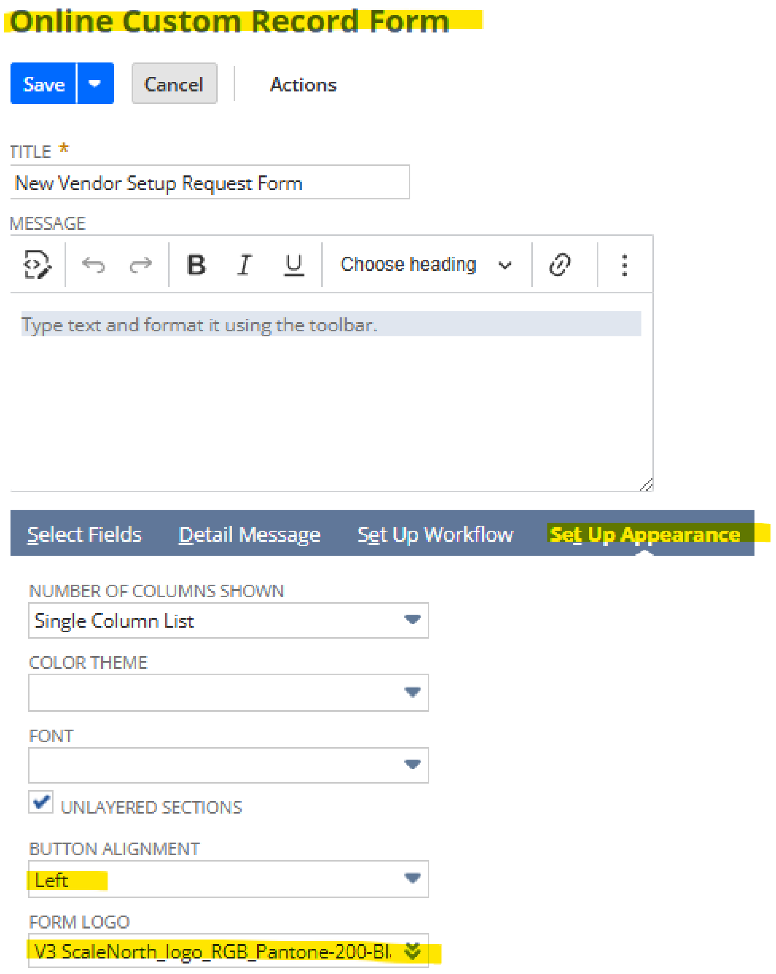
New Vendor Setup Request Online Form and Approval Workflow

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

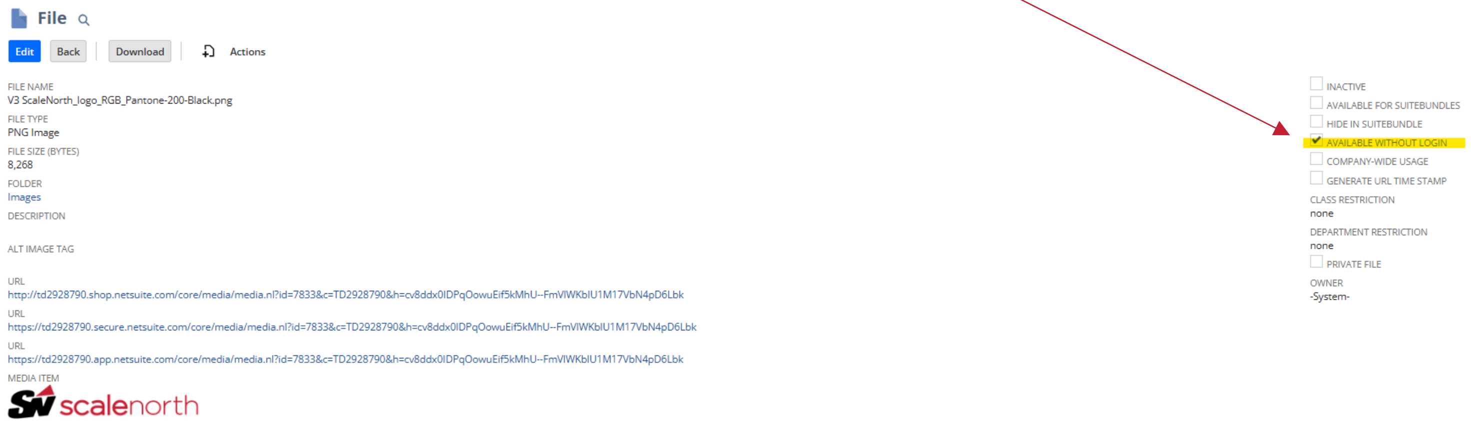


New Vendor Setup Request Online Form and Approval Workflow

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



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



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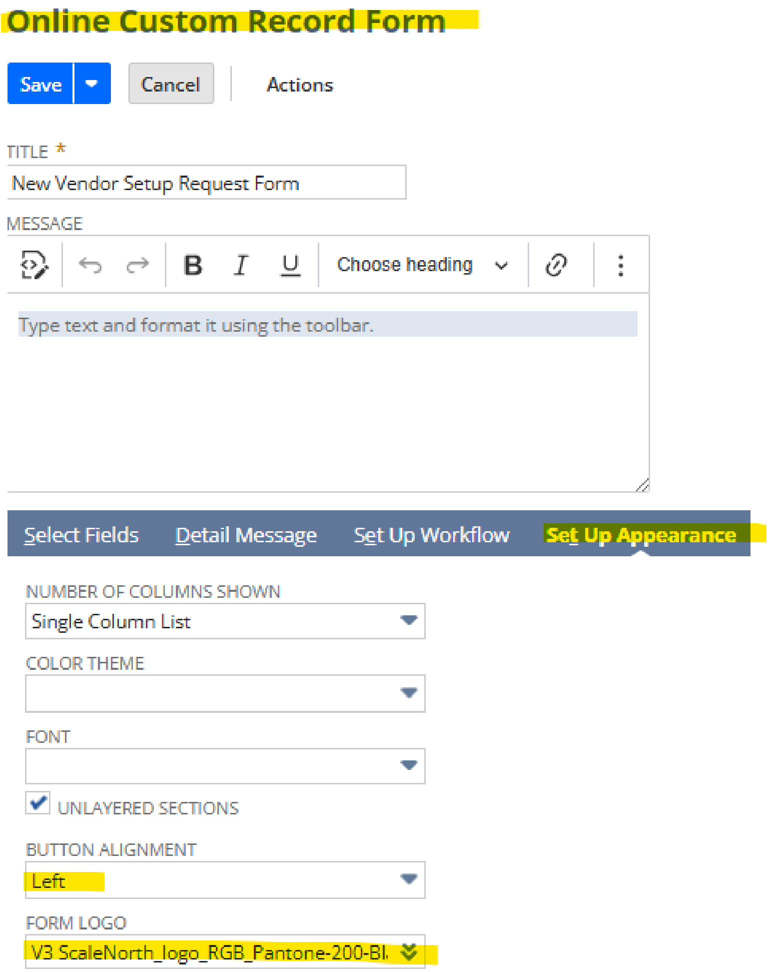

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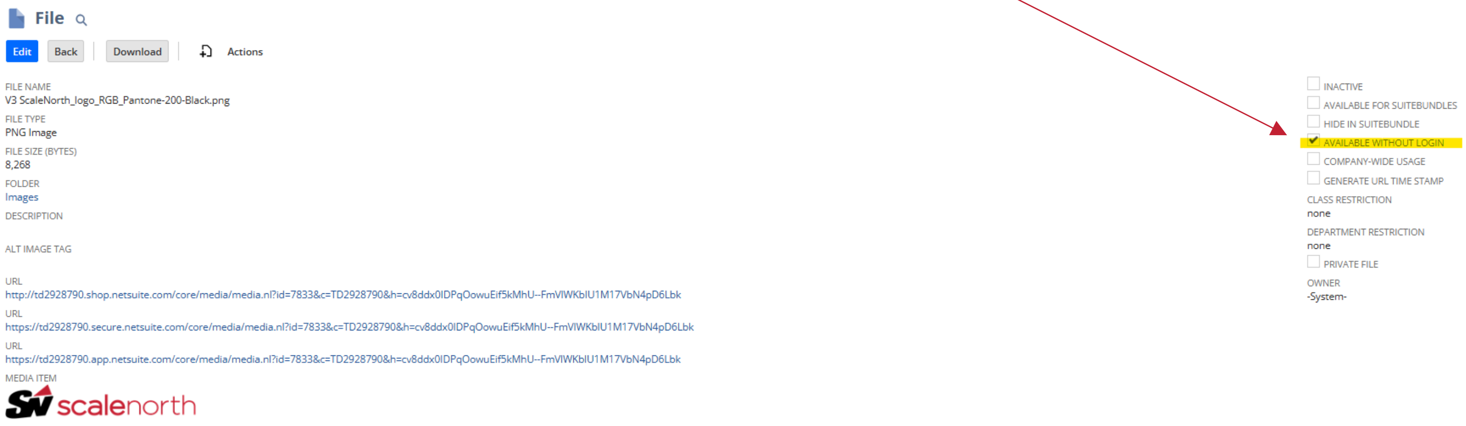
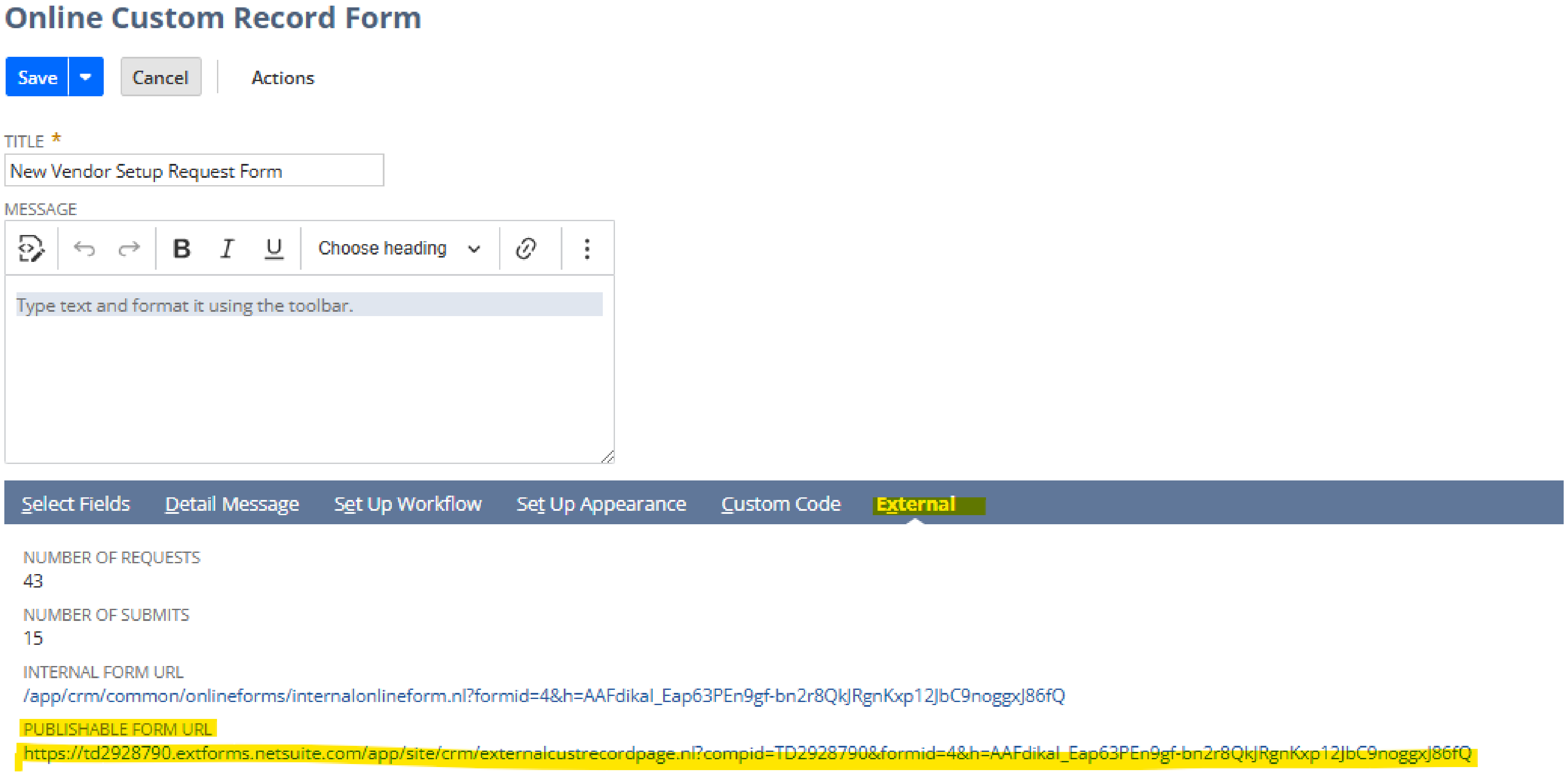


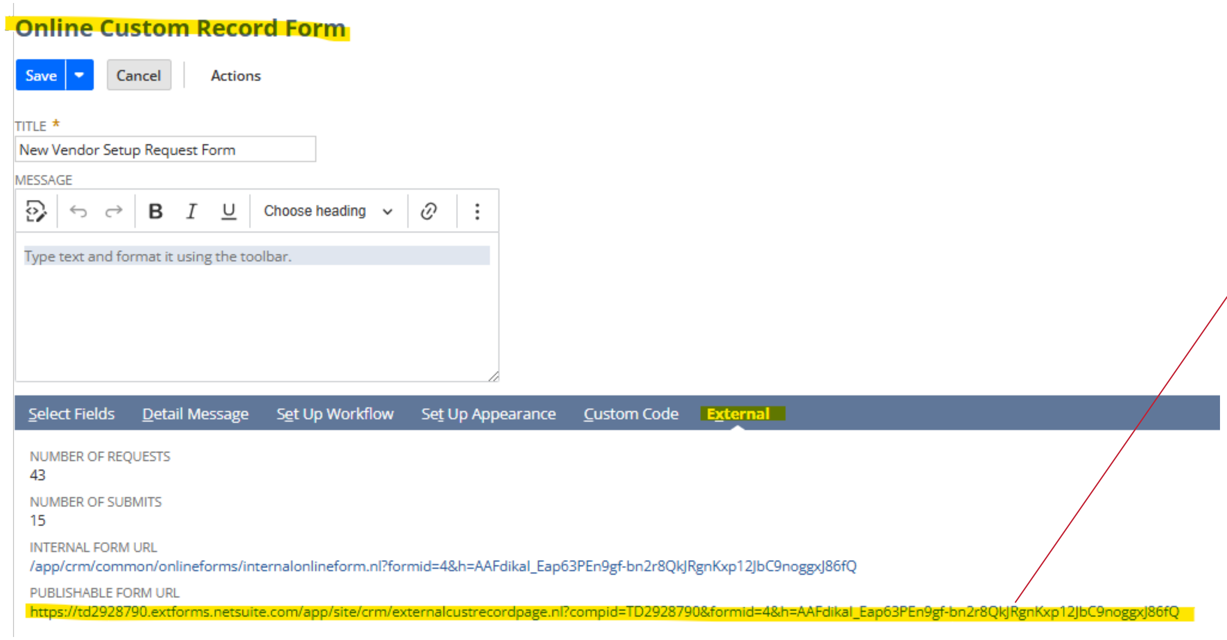
New Vendor Setup Request Online Form and Approval Workflow

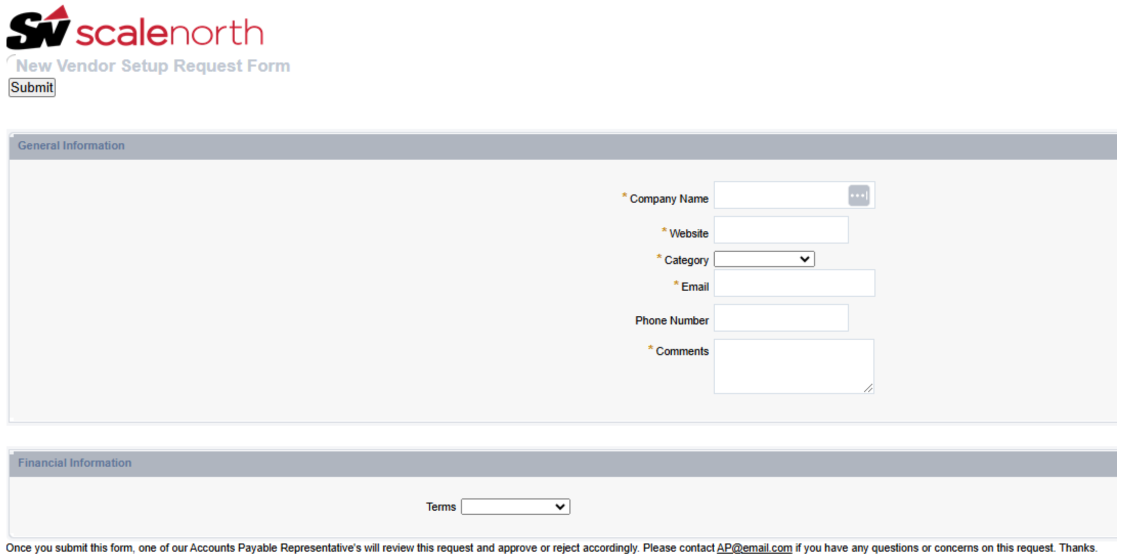
1. Create Custom Record
   - Now that we have named our custom record, what follows is the steps to complete the Fields, Subtabs and Online Forms tab
   - Online Forms>External
     - Note this is where the URL Link is for the online form you created
       - You can share this with people and tell users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



New Vendor Setup Request Online Form and Approval Workflow

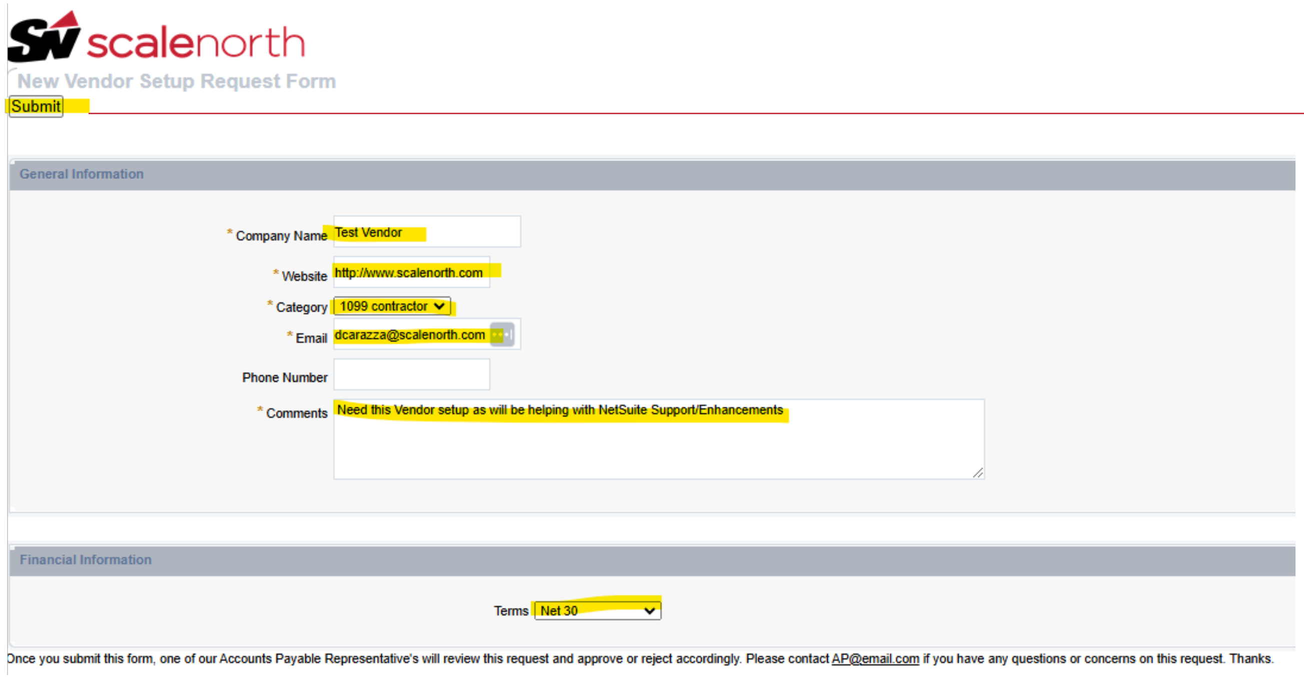
1. Create Custom Record
   - Now that we have created our Custom Record and configured the Online Form, we can test it out
   - Click on the External URL Link

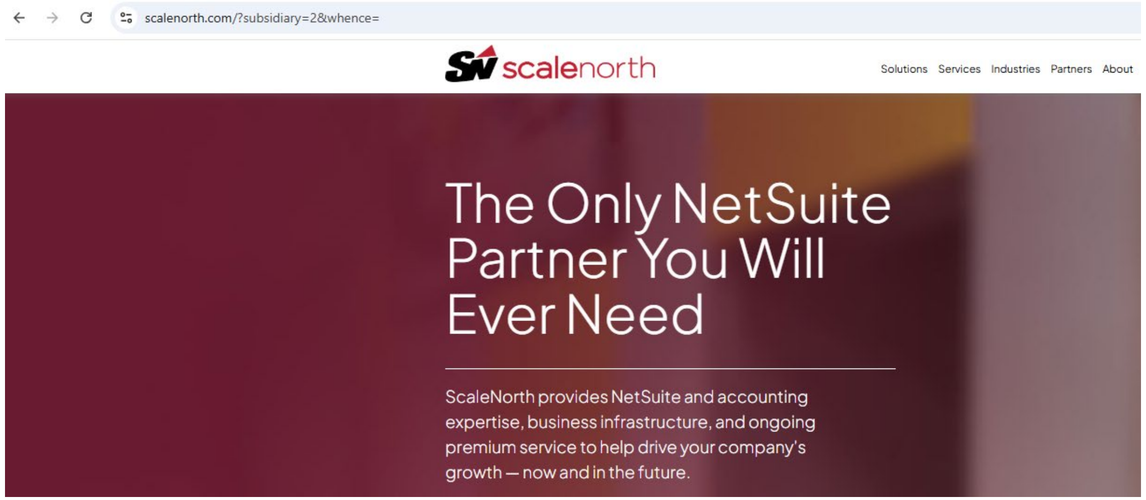




New Vendor Setup Request Online Form and Approval Workflow

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





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:

EDIT	FROM BUNDLE	ID	INTERNAL ID ▲	OWNER	CUSTOM SEGMENT	LIST	NEW RECORD	SEARCH
Deployment Type	39609	customrecord_ns_ibe_act_conf_deply_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

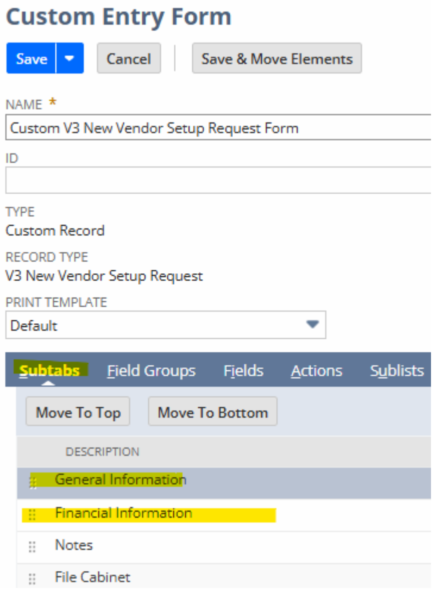
SHOW INACTIVES — EDIT

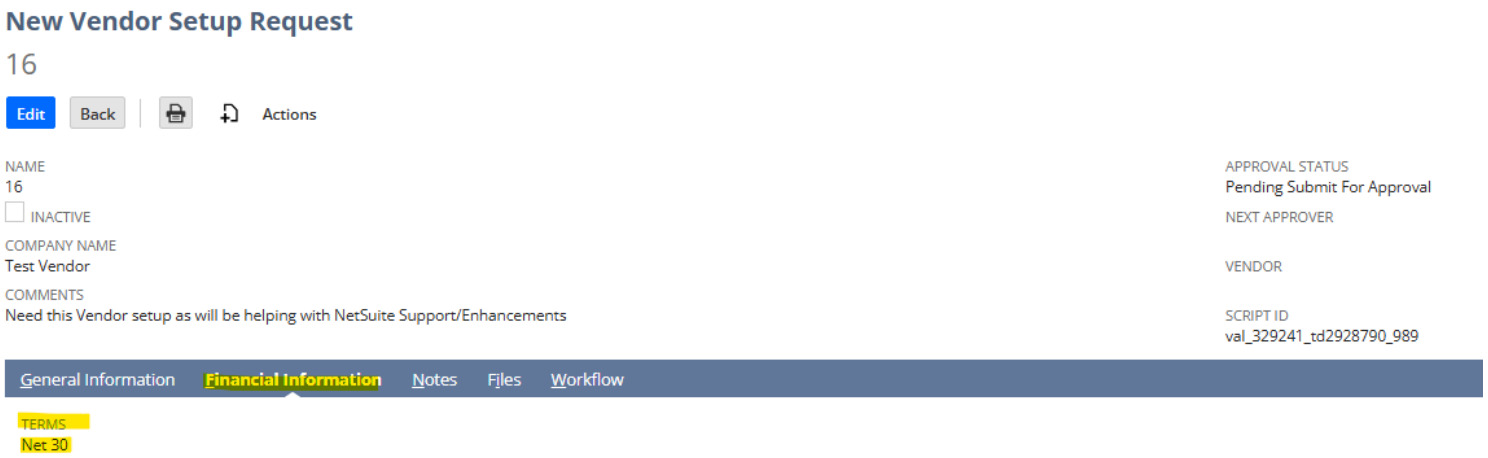
EDIT | VIEW	INTERNAL ID ▲	NAME
Edit | View	1	1
Edit | View	3	3
Edit | View	4	4
Edit | View	5	5
Edit | View	6	6
Edit | View	7	7
Edit | View	9	9
Edit | View	10	10
Edit | View	12	12
Edit | View	13	13
Edit | View	14	14
Edit | View	15	15
Edit | View	16	16

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

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





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

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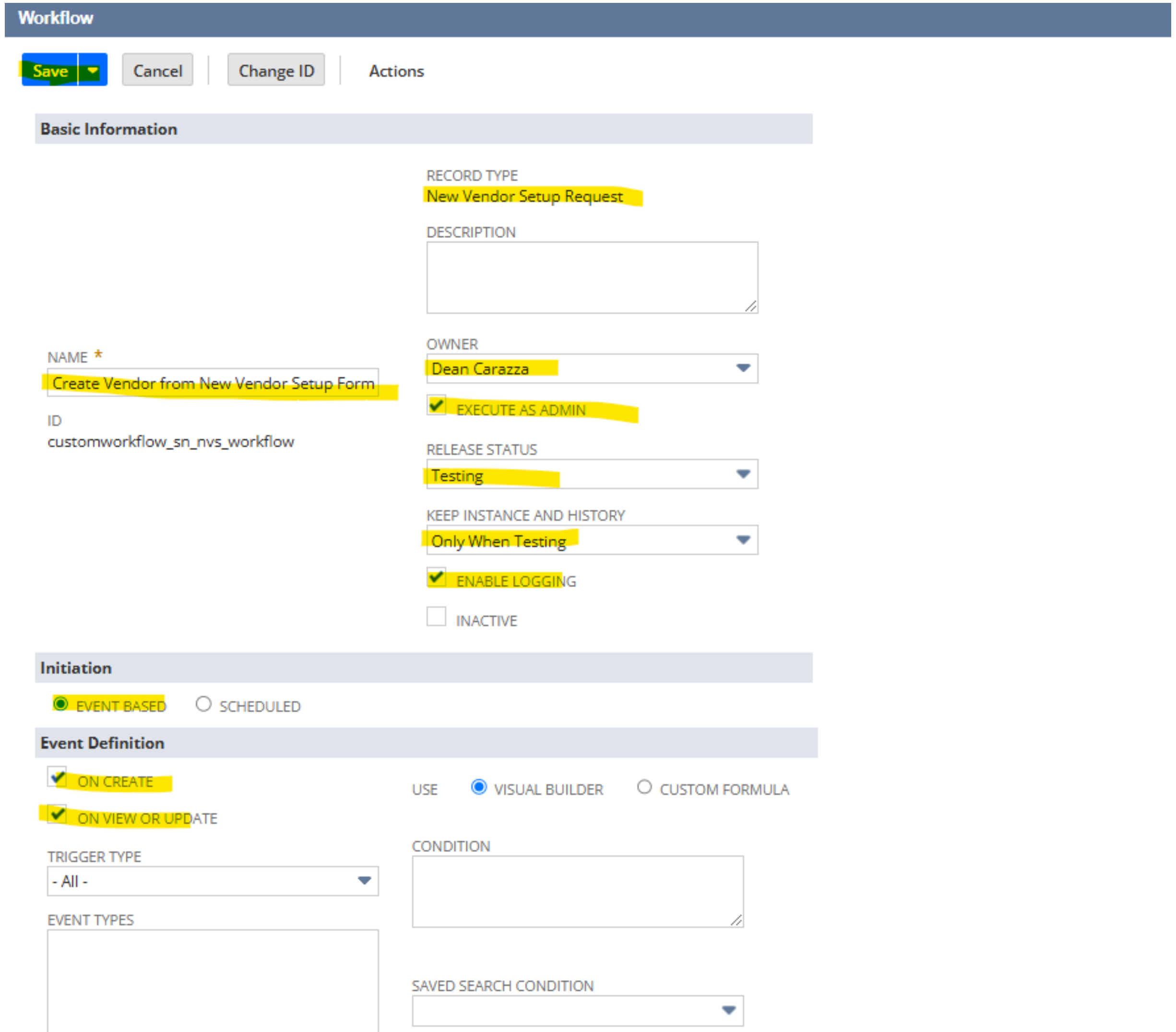
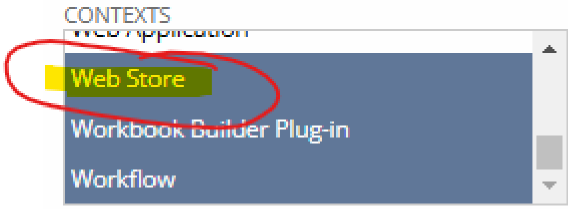
New Vendor Setup Request Online Form and Approval Workflow

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



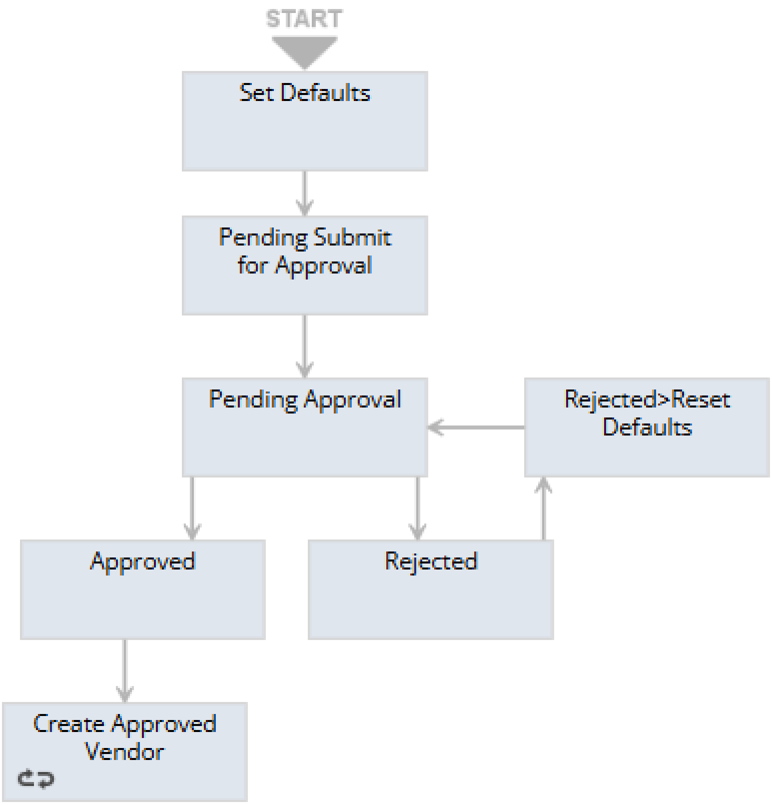
Note – Since the New Vendor Request record is created from an online form which system uses context of Webstore, we need to make sure Web Store Context is also selected see screen shot below

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



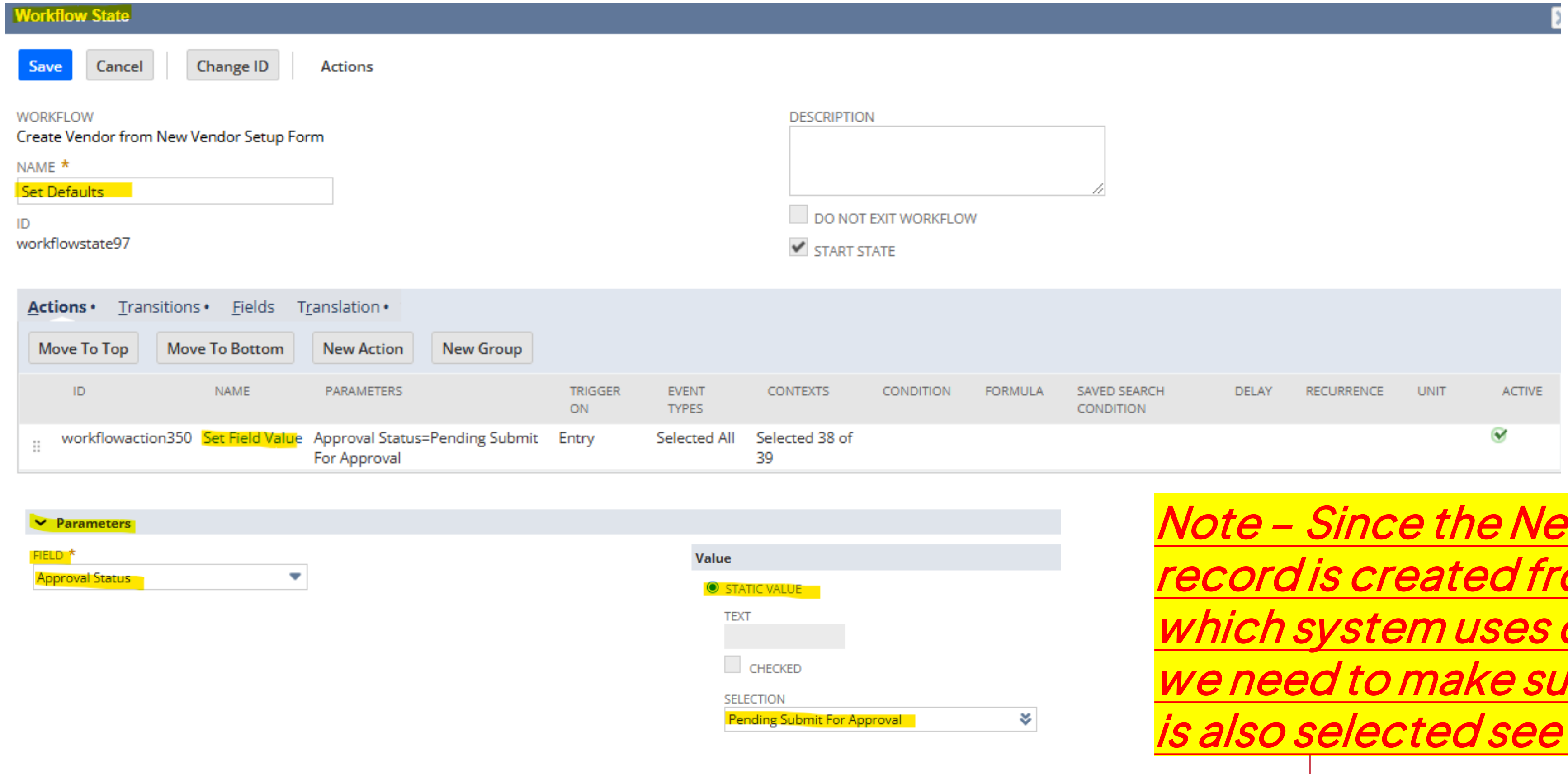
New Vendor Setup Request Online Form and Approval Workflow

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

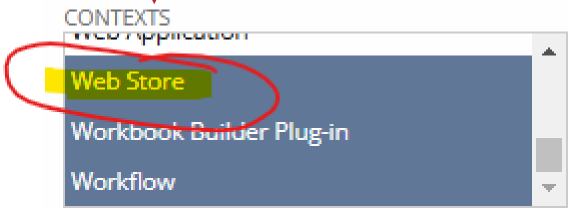


New Vendor Setup Request Online Form and Approval Workflow

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

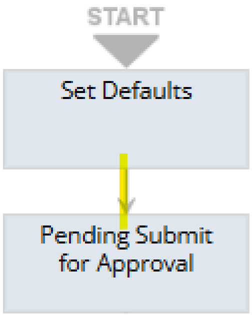


Note – Since the New Vendor Request record is created from an online form which system uses context of Webstore, we need to make sure Web Store Context is also selected see screen shot below



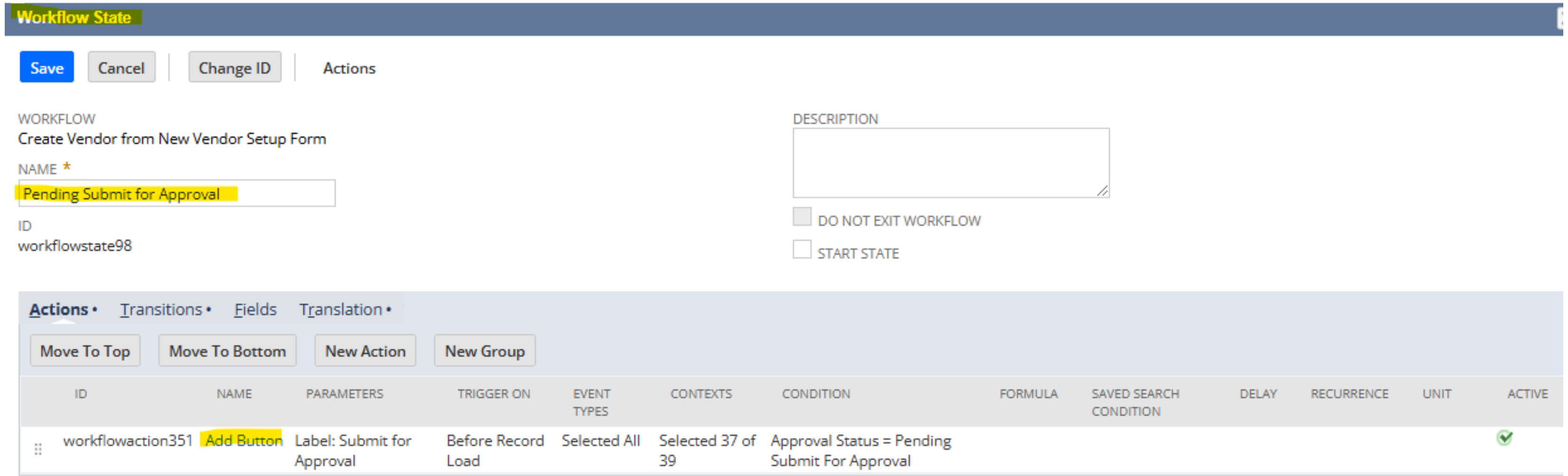
New Vendor Setup Request Online Form and Approval Workflow

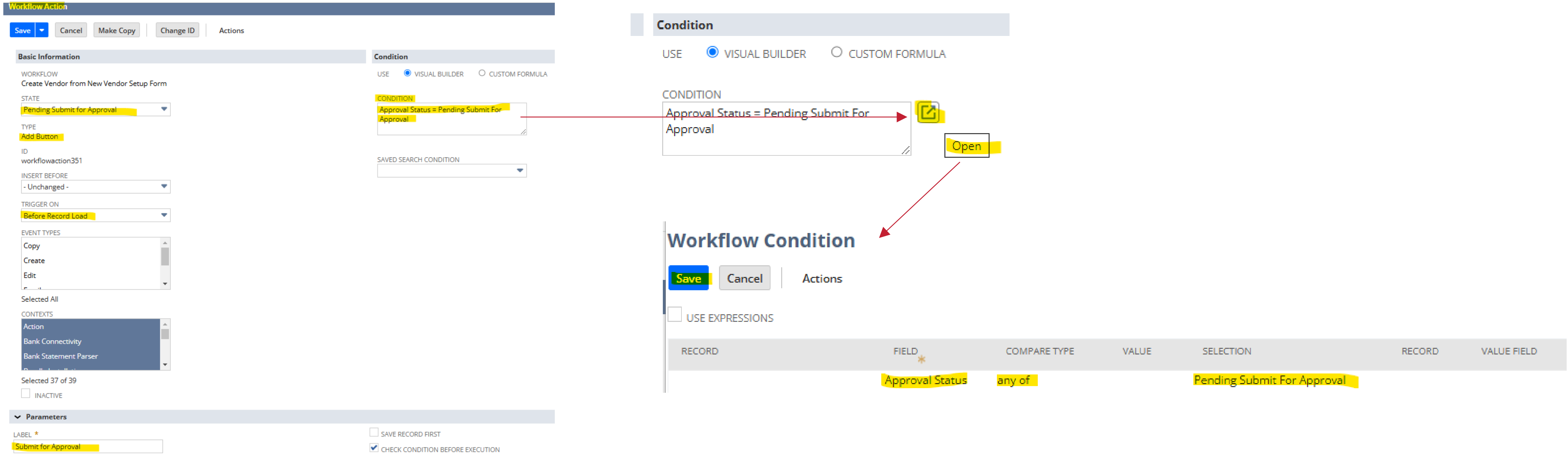
1. Create Approval and Approved Vendor Creation Workflow
   - While in Edit mode create a New State for Pending Submit for Approval
   - Drag a transition arrow from Set Defaults to Pending Submit for Approval



New Vendor Setup Request Online Form and Approval Workflow

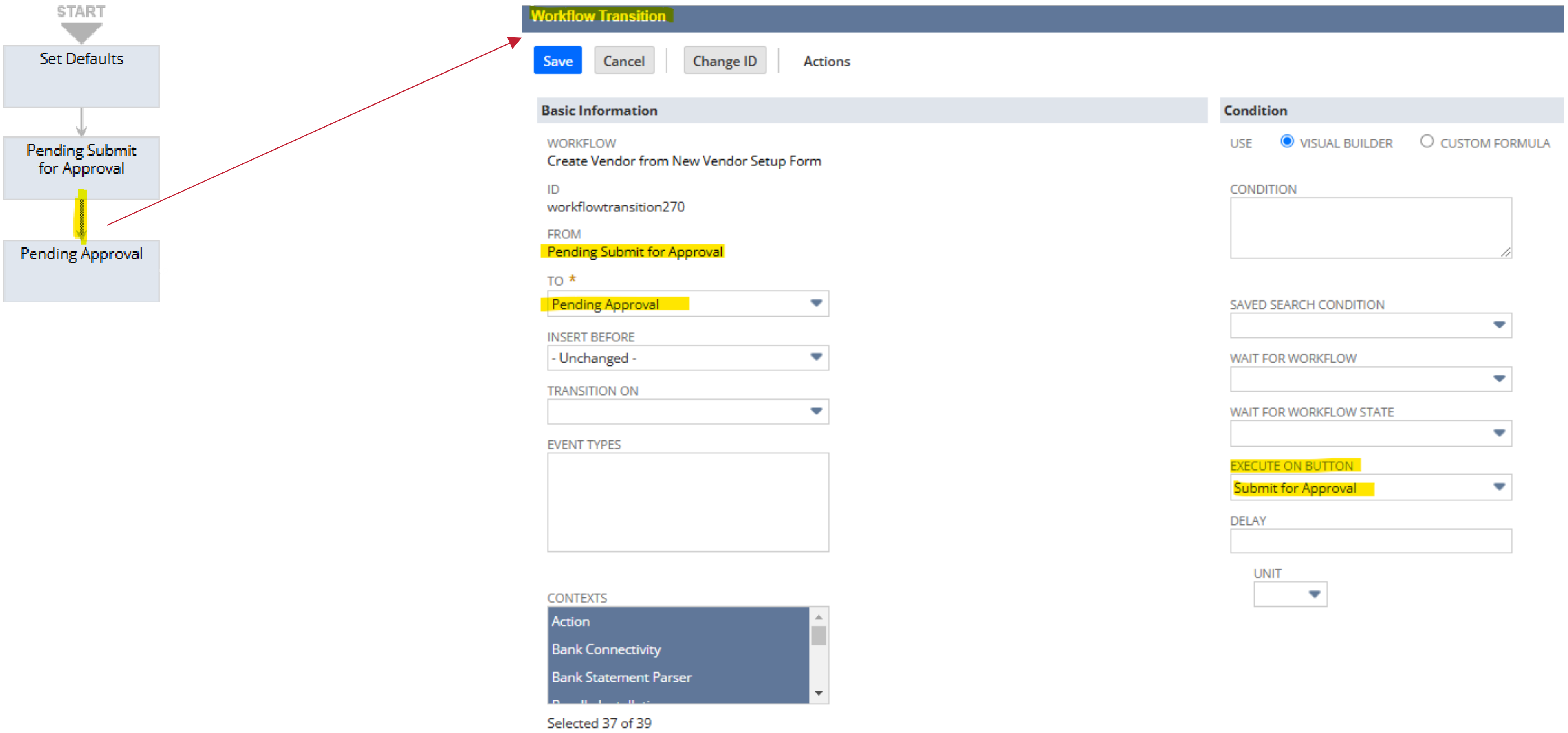
1. Create Approval and Approved Vendor Creation Workflow
   - Pending Submit for Approval - State





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



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 *
Pending Approval

ID
workflowstate99

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

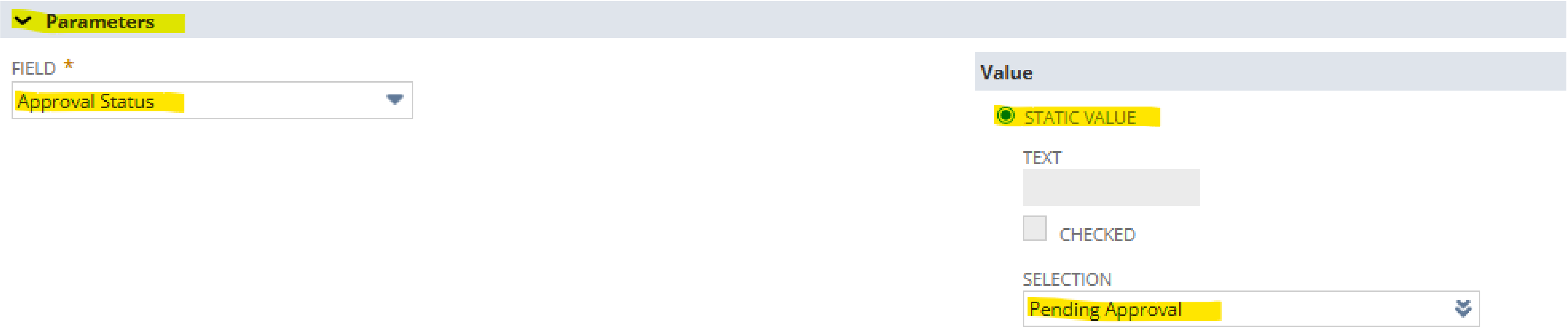
Actions • | Transitions • | Fields | Translation •

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

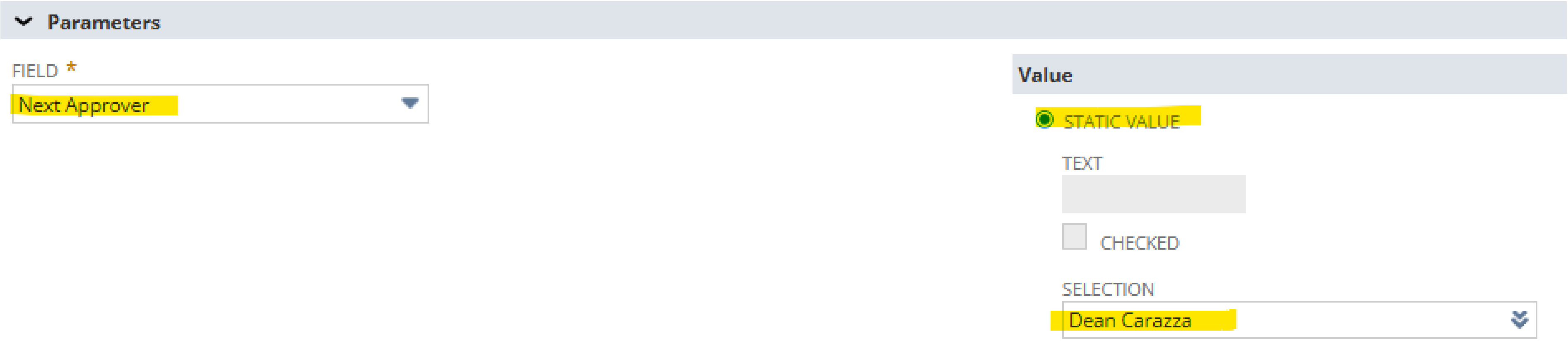
ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction352	Set Field Value	Approval Status=Pending Approval	Entry	Selected All	Selected 37 of 39							✓
workflowaction353	Set Field Value	Next Approver=Dean Carazza	Entry	Selected 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

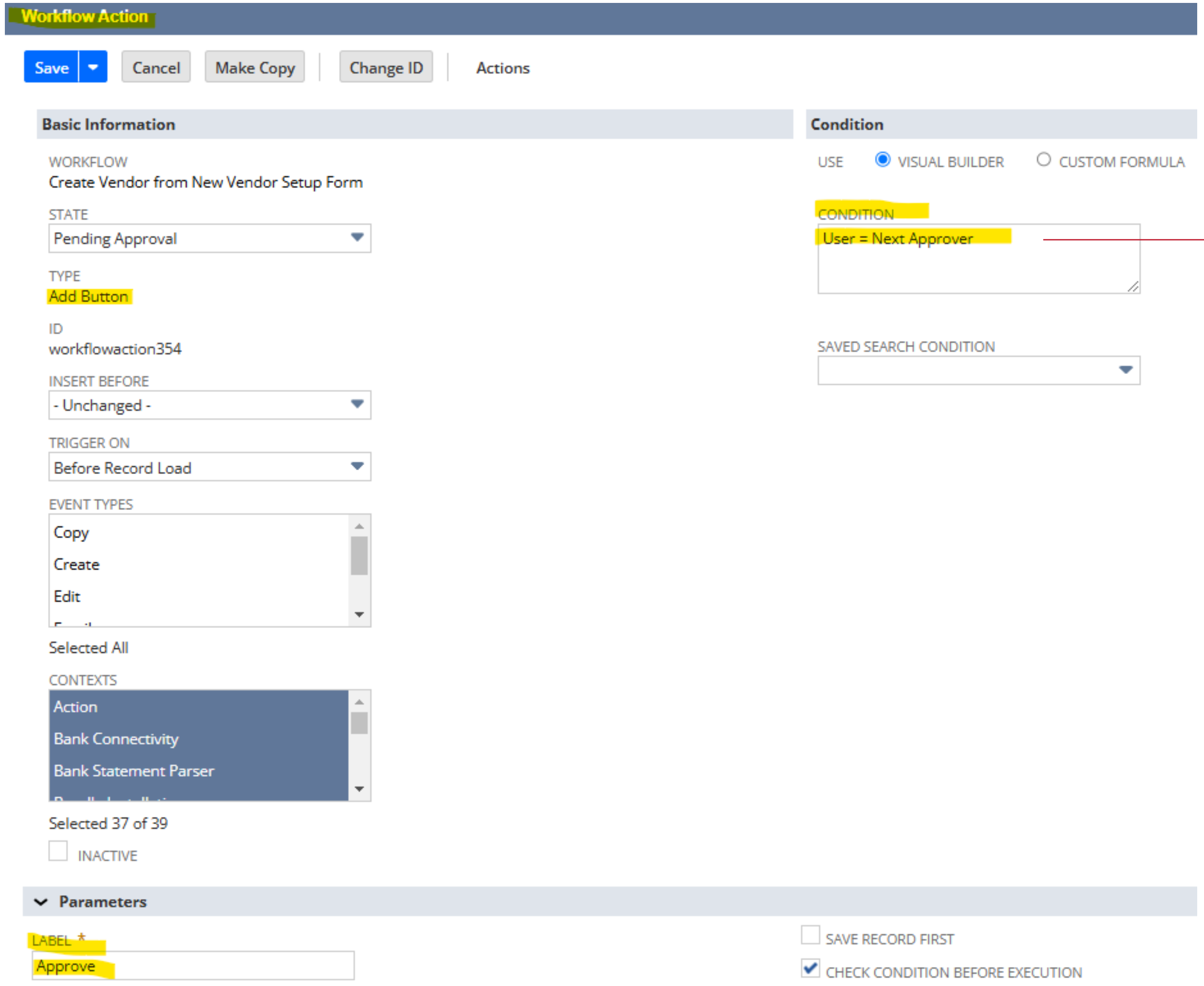


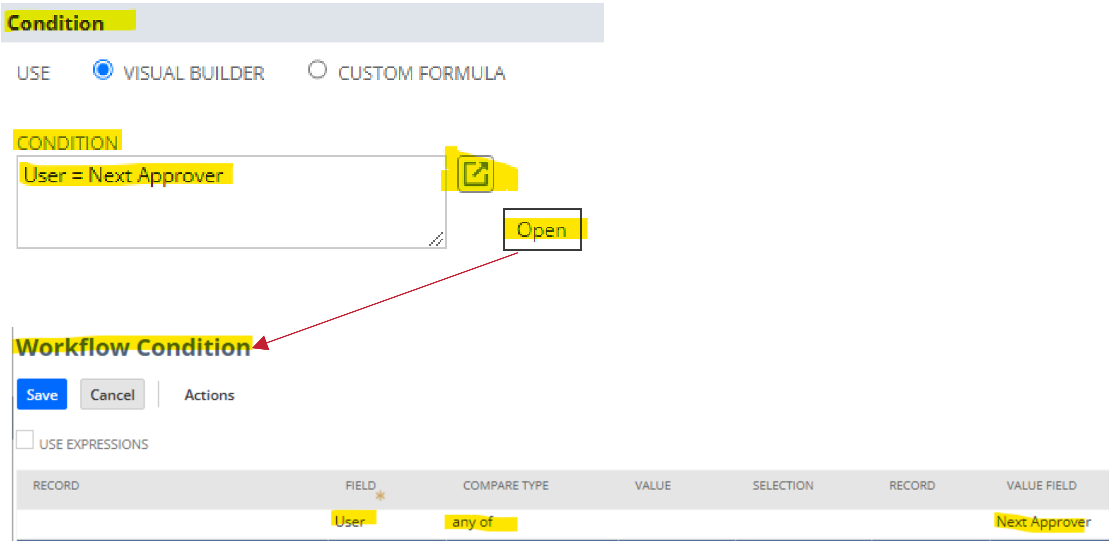
     - Set Next Approver to me



New Vendor Setup Request Online Form and Approval Workflow

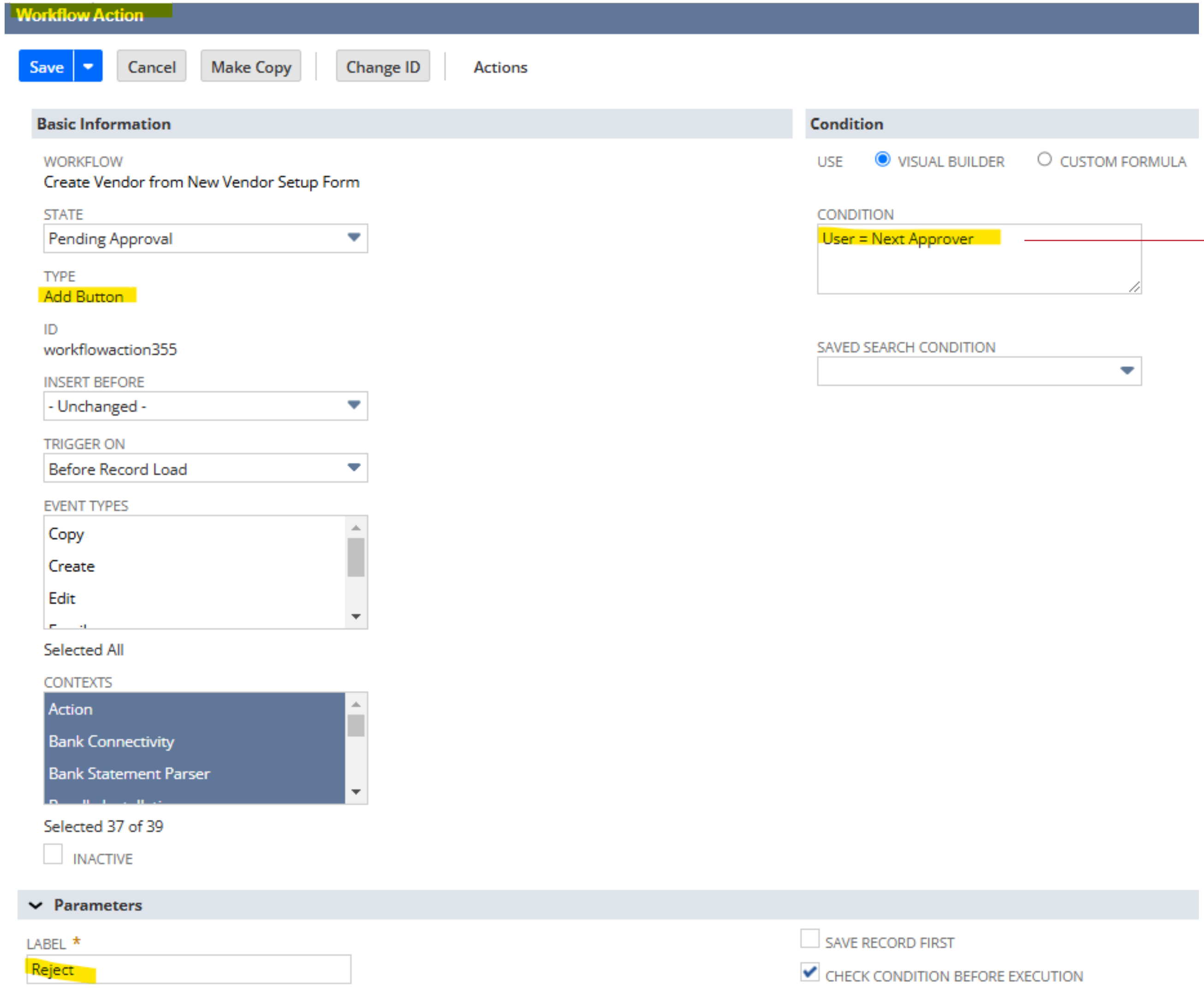
1. Create Approval and Approved Vendor Creation Workflow
   - Pending Approval – State
     - Add Approve and Reject Buttons
       - Add Approve Button with condition to show when User = Next Approver

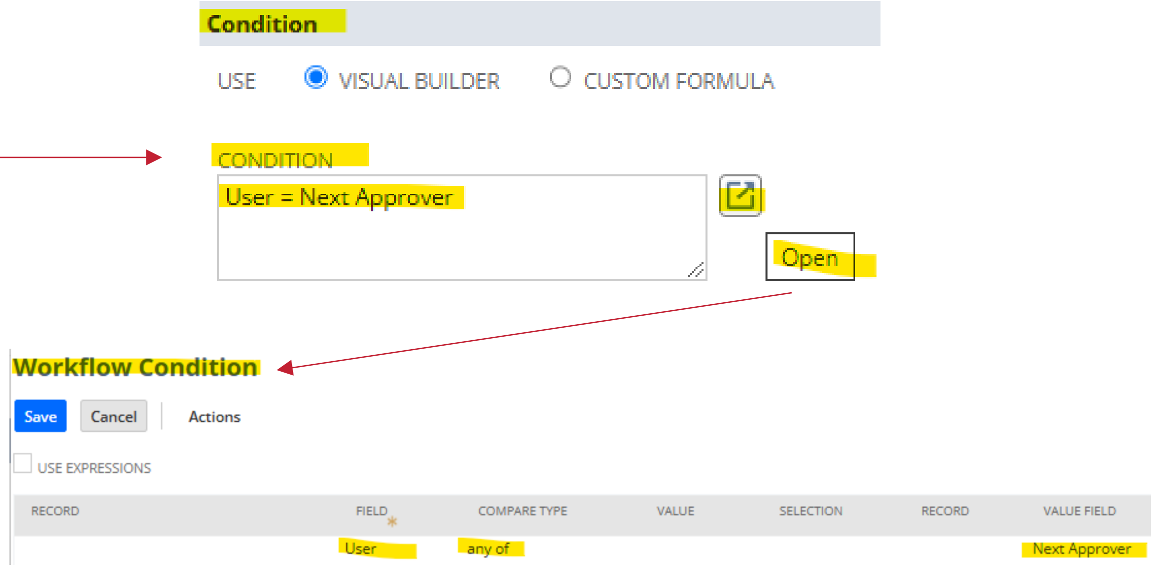




New Vendor Setup Request Online Form and Approval Workflow

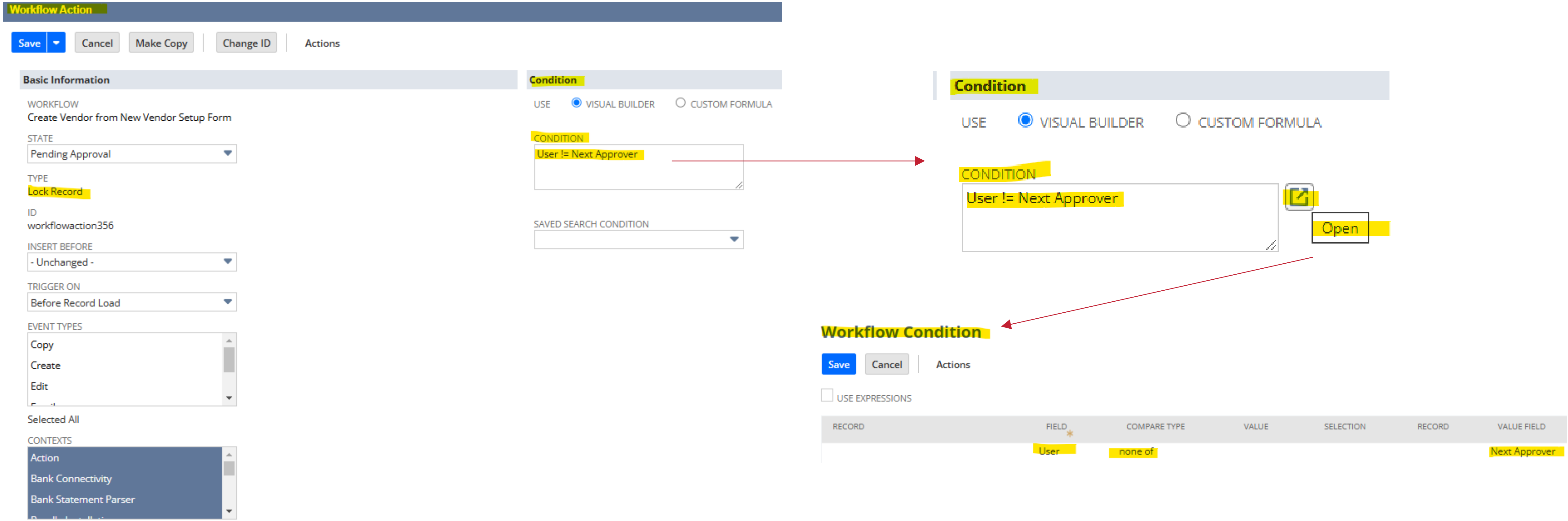
1. Create Approval and Approved Vendor Creation Workflow
   - Pending Approval – State
     - Add Approve and Reject Buttons
       - Add Reject Button with condition to show when User = Next Approver





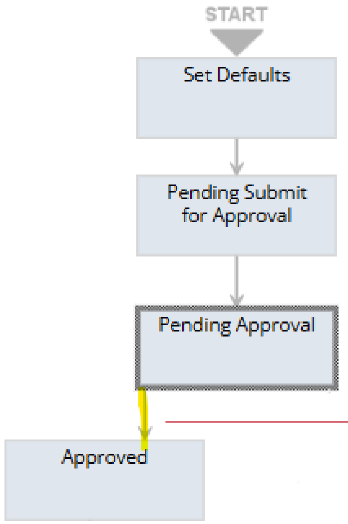
New Vendor Setup Request Online Form and Approval Workflow

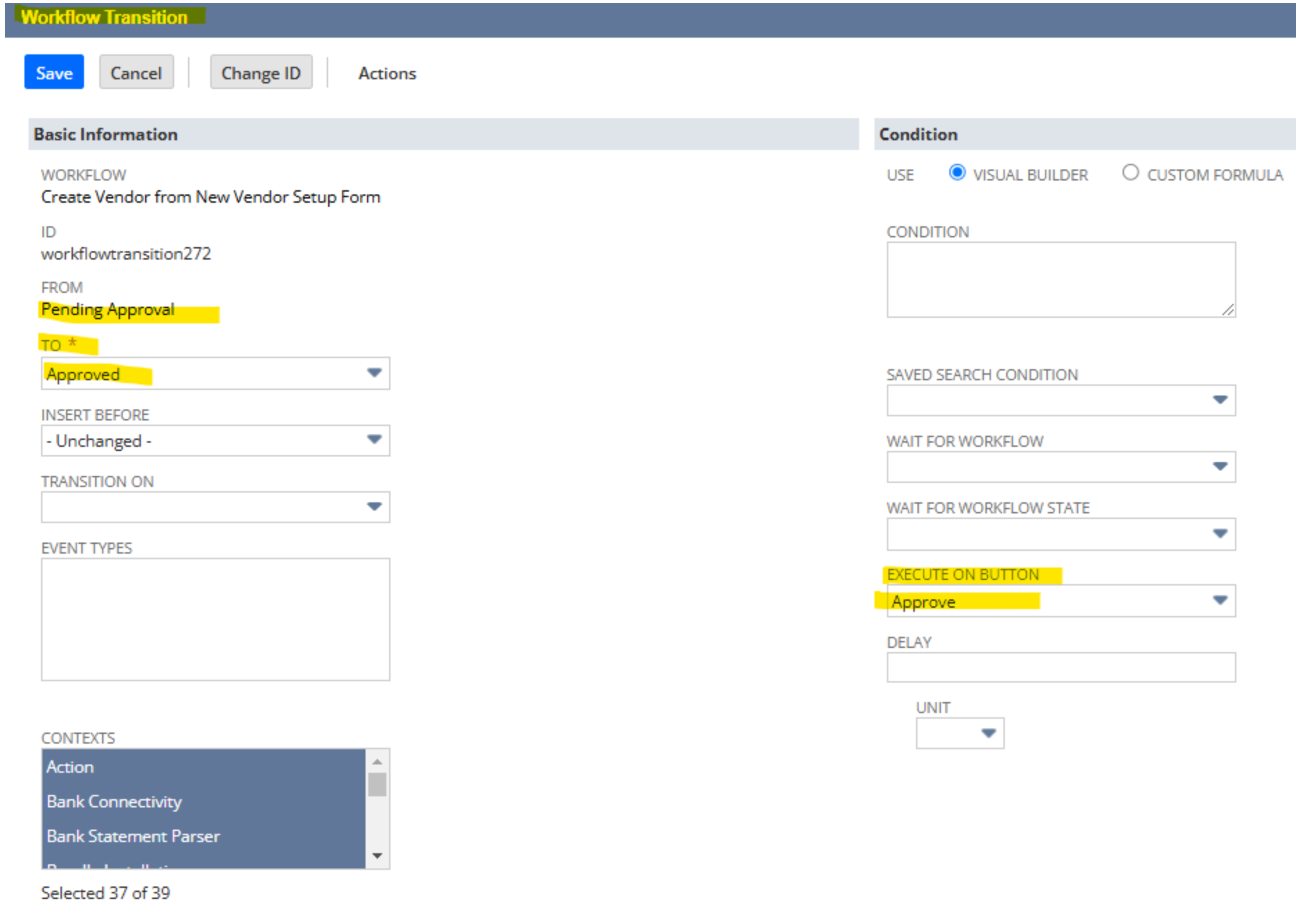
1. Create Approval and Approved Vendor Creation Workflow
   - Pending Approval – State
     - Lock the Record while in Pending Approval State if user is not same as the next approver



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

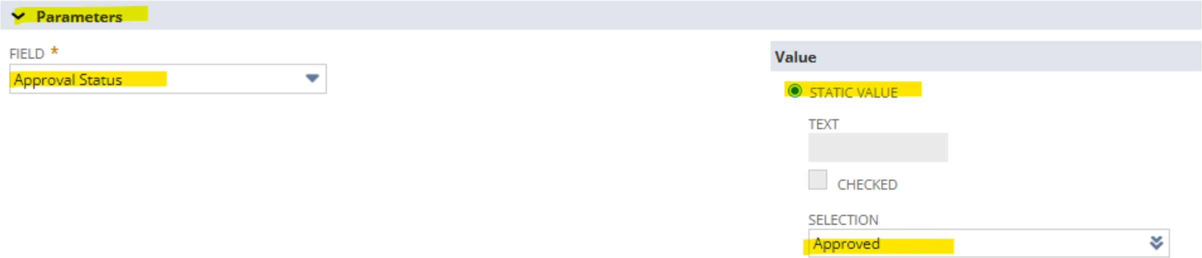
Actions • | Transitions • | Fields | Translation •

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

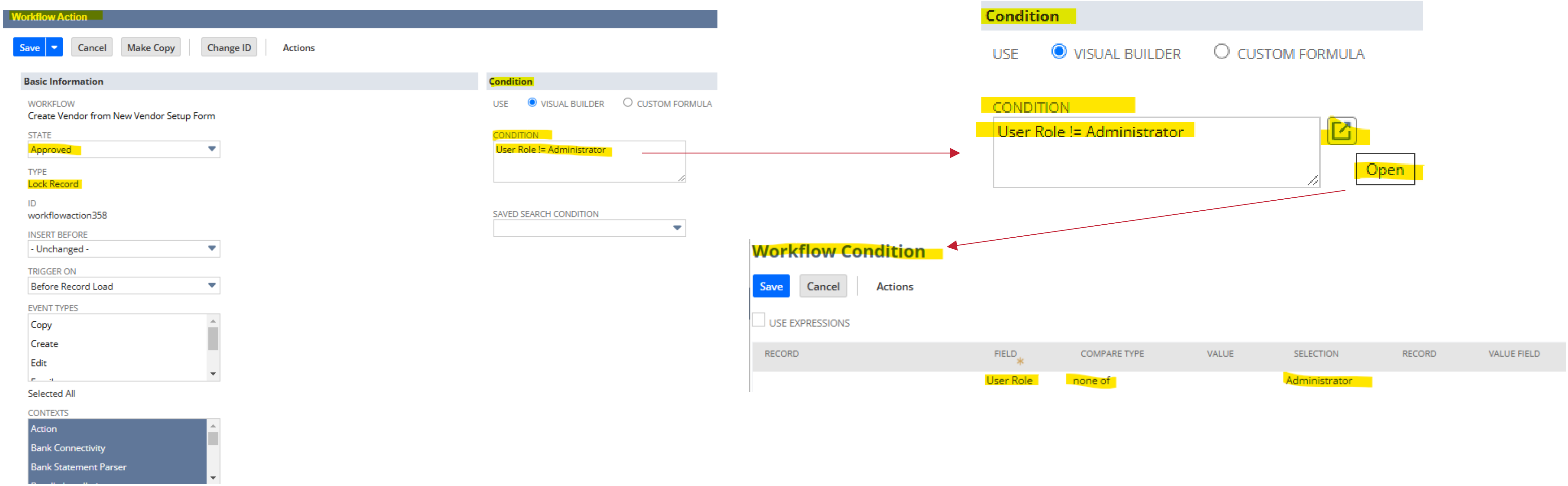
ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction357	Set Field Value	Approval Status=Approved	Entry	Selected All	Selected 37 of 39							✔
workflowaction358	Lock Record		Before Record Load	Selected All	Selected 37 of 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

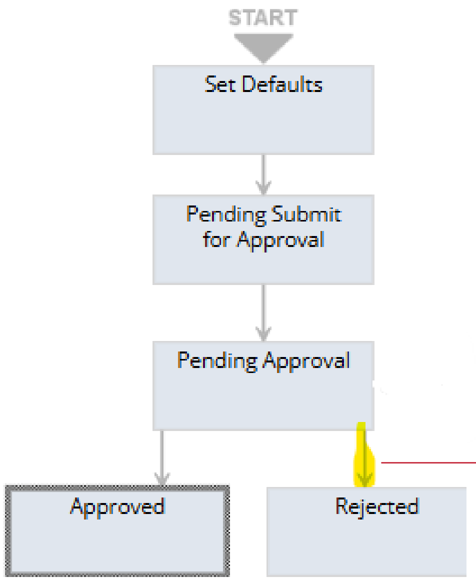


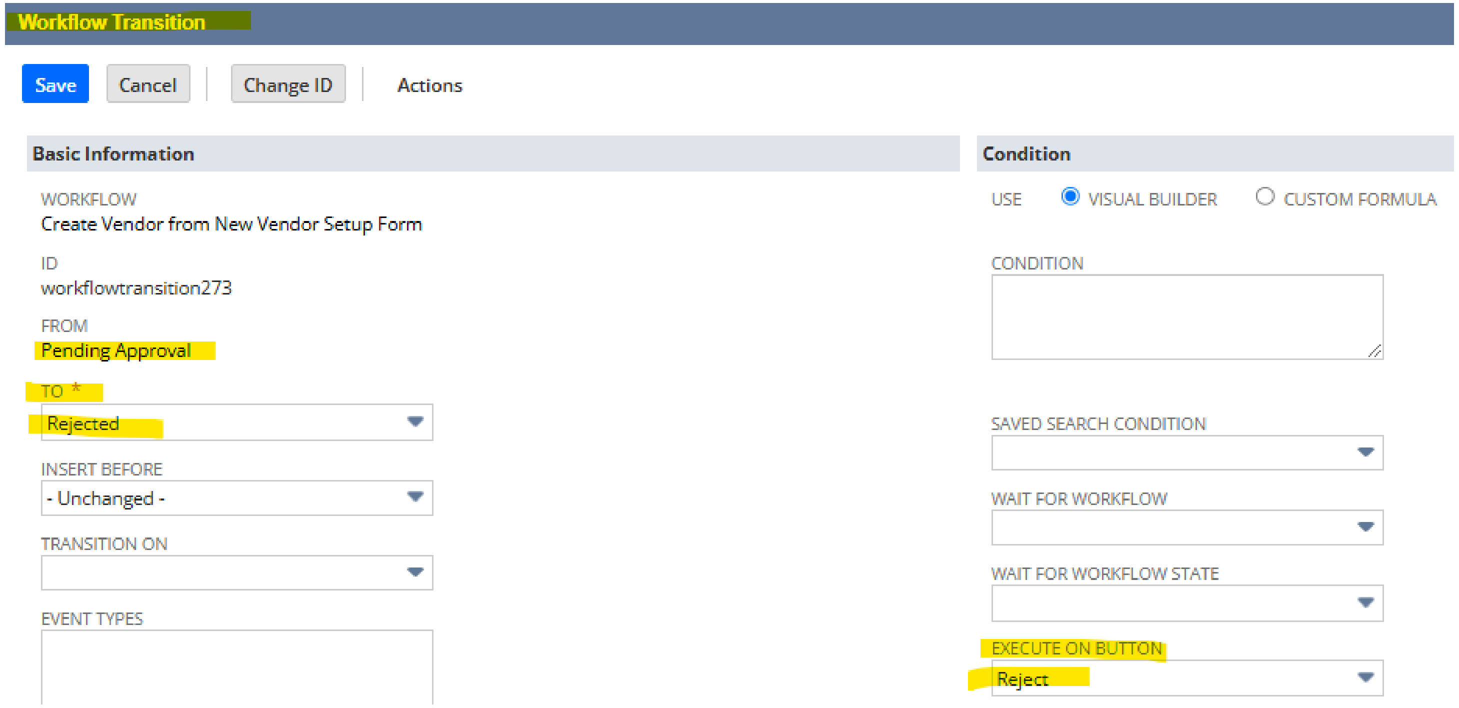
     - Lock the Record once has been approved except for users with administrator role



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 Sate 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

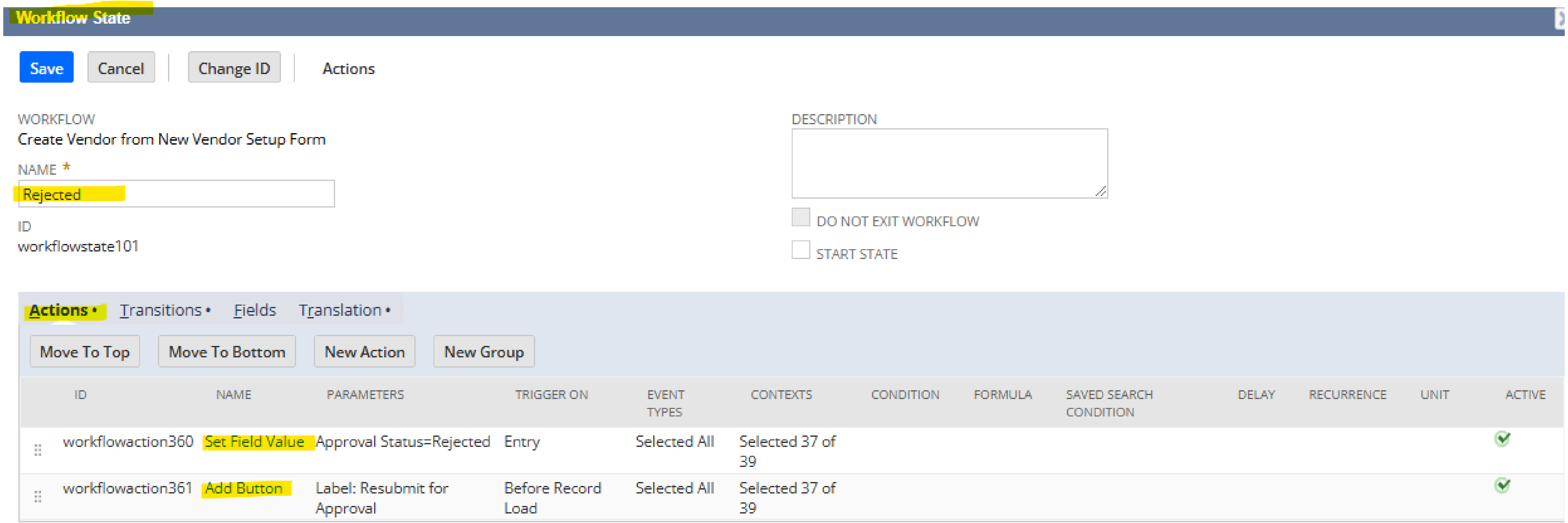




New Vendor Setup Request Online Form and Approval Workflow

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

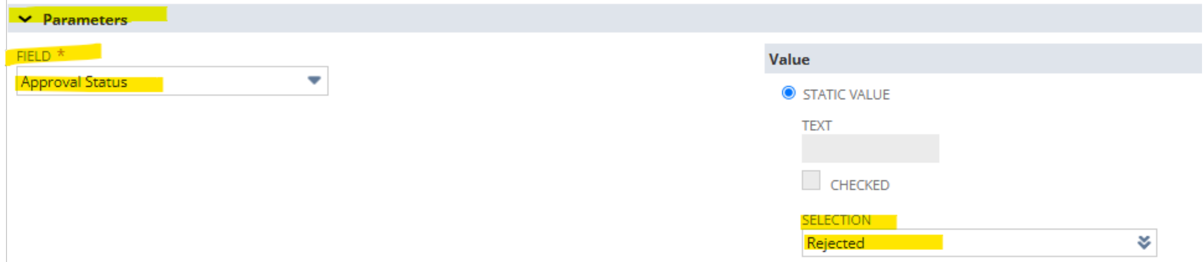
Actions • | Transitions • | Fields | Translation •

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

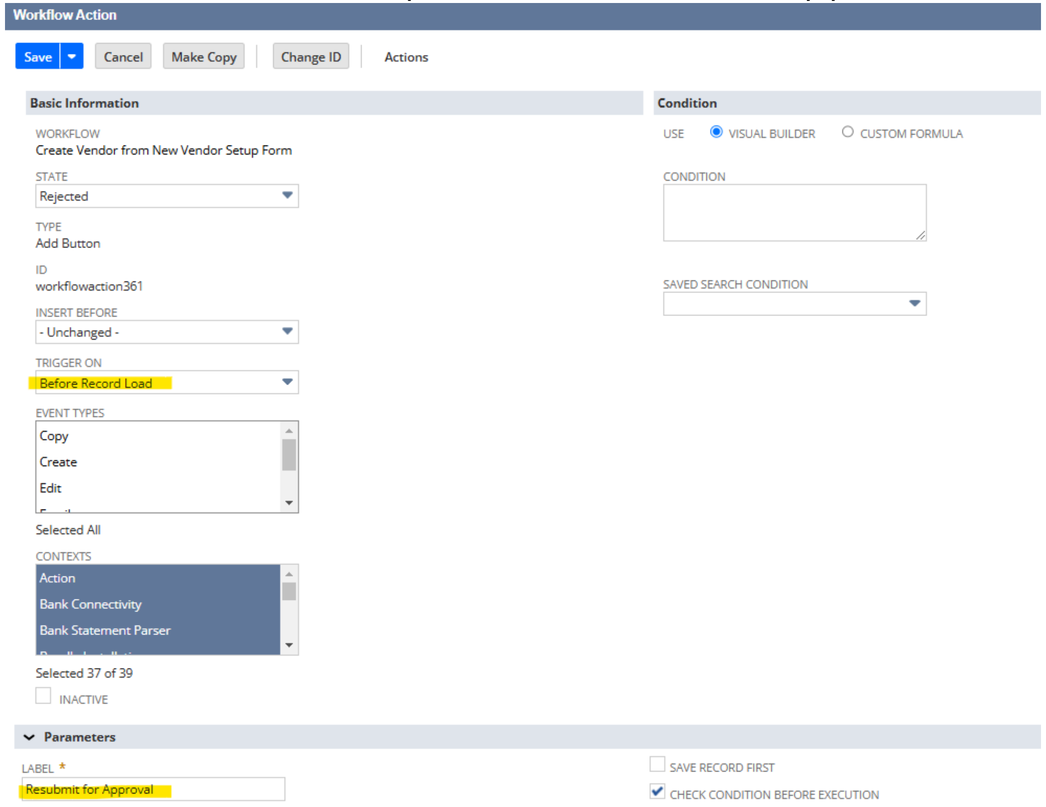
ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction360	Set Field Value	Approval Status=Rejected	Entry	Selected All	Selected 37 of 39							✔
workflowaction361	Add Button	Label: Resubmit for Approval	Before Record Load	Selected All	Selected 37 of 39							✔

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

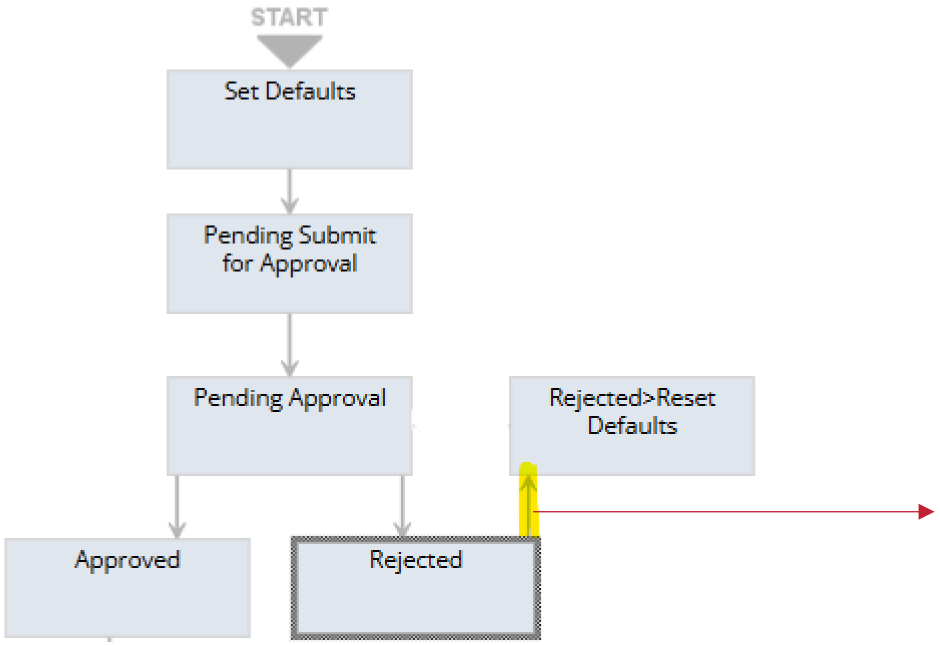


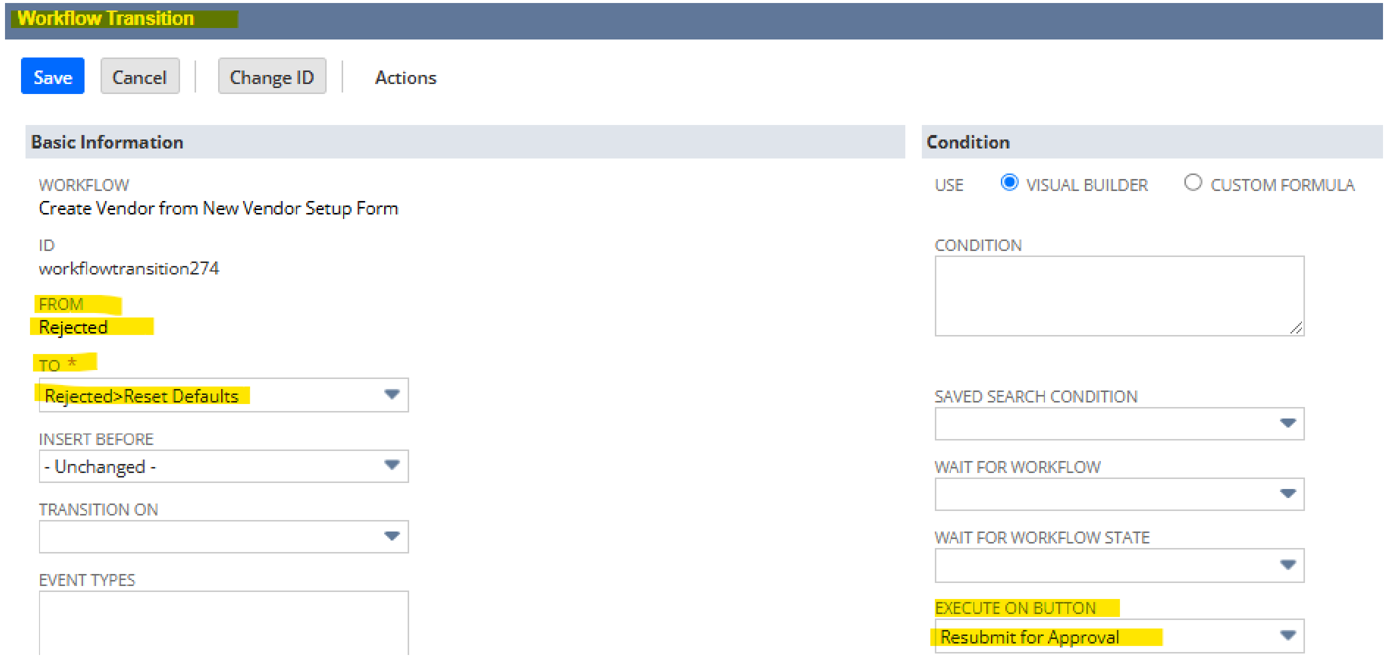
     - Add Button to show option to Resubmit for Approval



New Vendor Setup Request Online Form and Approval Workflow

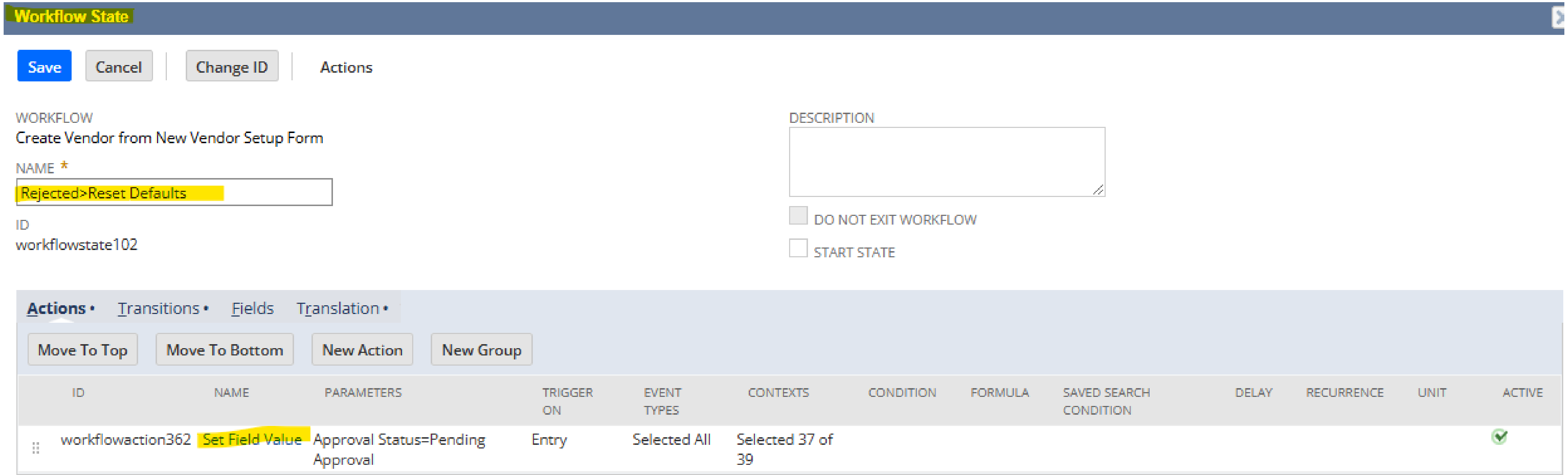
1. Create Approval and Approved Vendor Creation Workflow
   - Next, while in edit mode create another state called Rejected>Reset Defaults
   - Draw transition arrow from Rejected to Rejected>Reset Defaults
   - Double click on Transition arrow connecting Rejected to Rejected>Reset Defaults and add a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





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

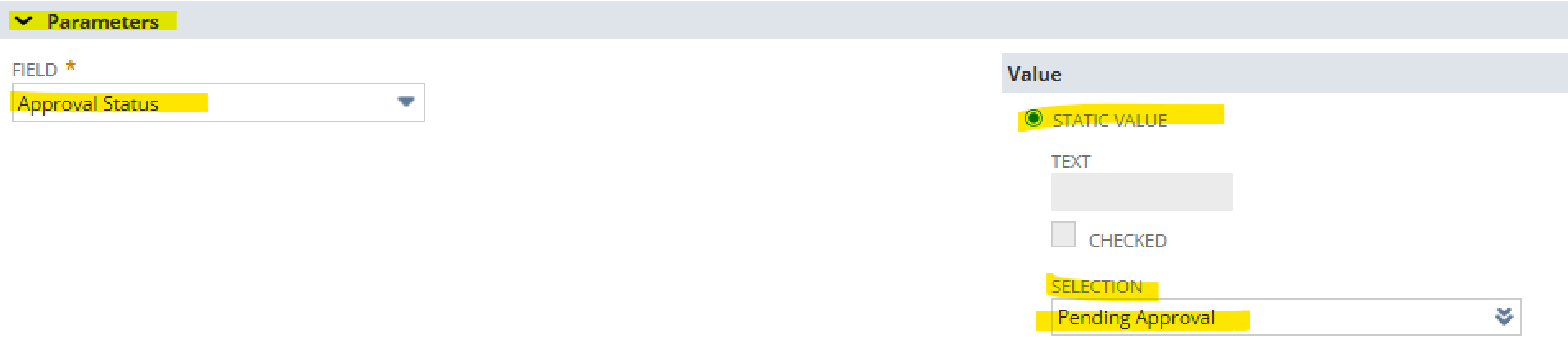
START STATE

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							✓

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



Parameters

FIELD *
Approval Status

Value

STATIC VALUE

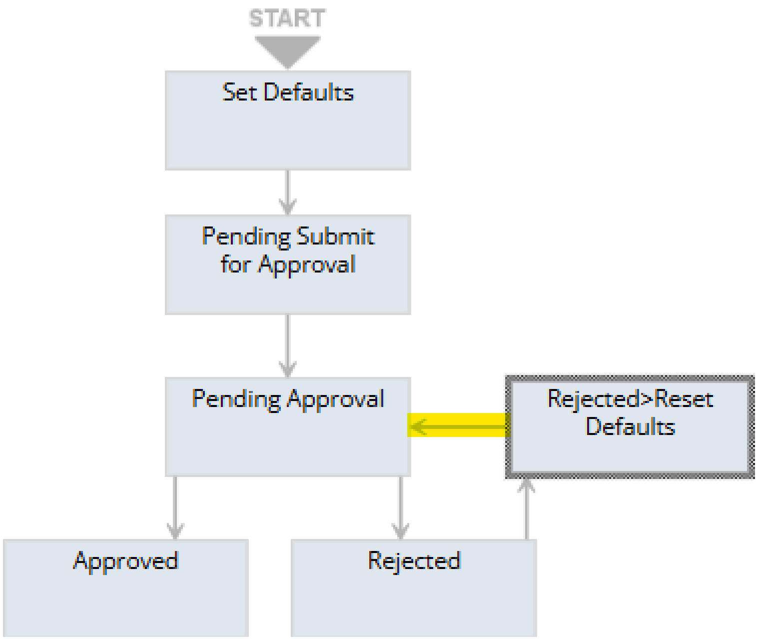
TEXT

CHECKED

SELECTION
Pending Approval

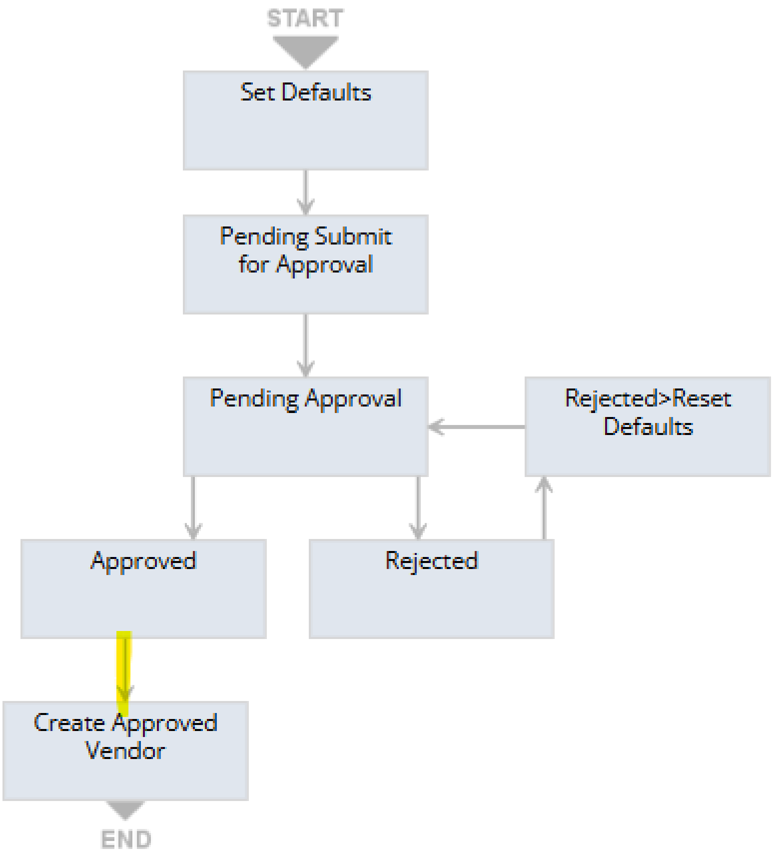
New Vendor Setup Request Online Form and Approval Workflow

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



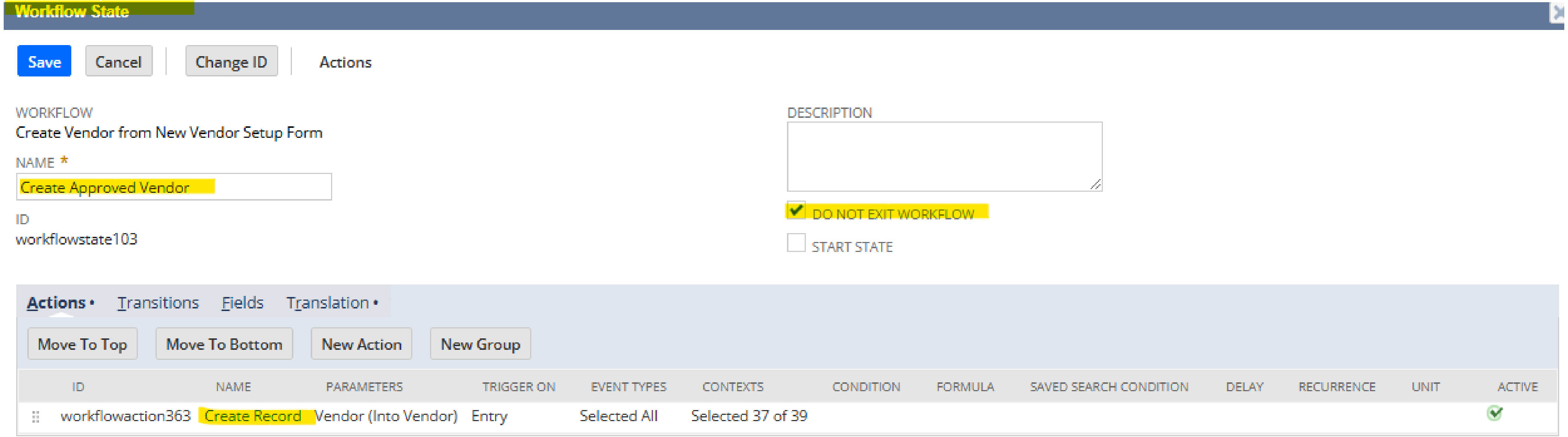
New Vendor Setup Request Online Form and Approval Workflow

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



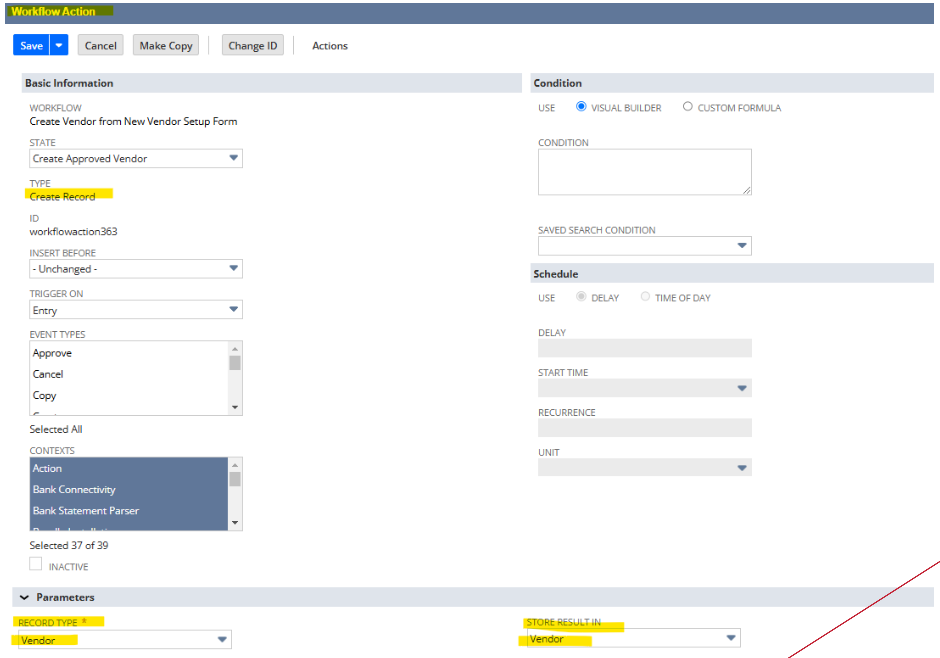
New Vendor Setup Request Online Form and Approval Workflow

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



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

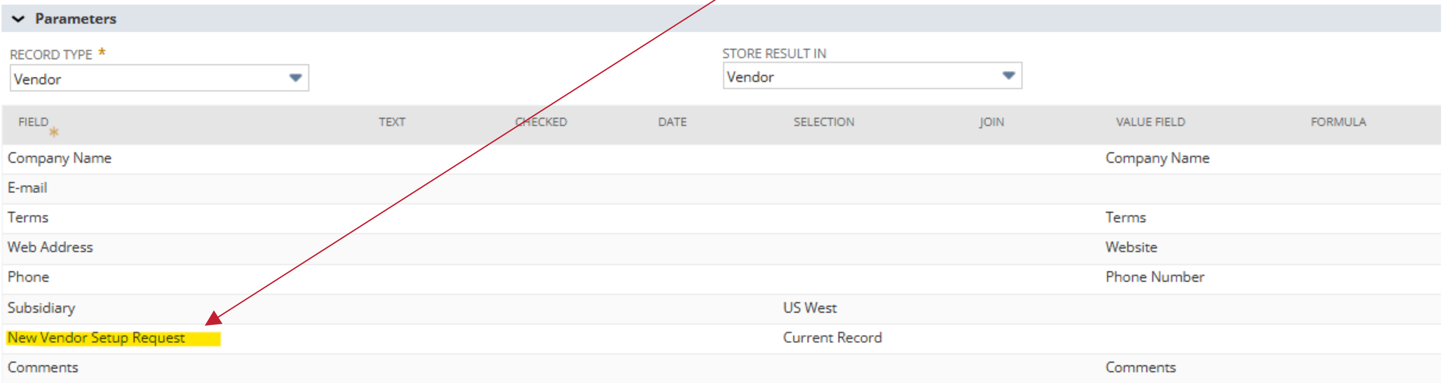
Parameters

RECORD TYPE *
Vendor

STORE RESULT IN
Vendor

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



Parameters

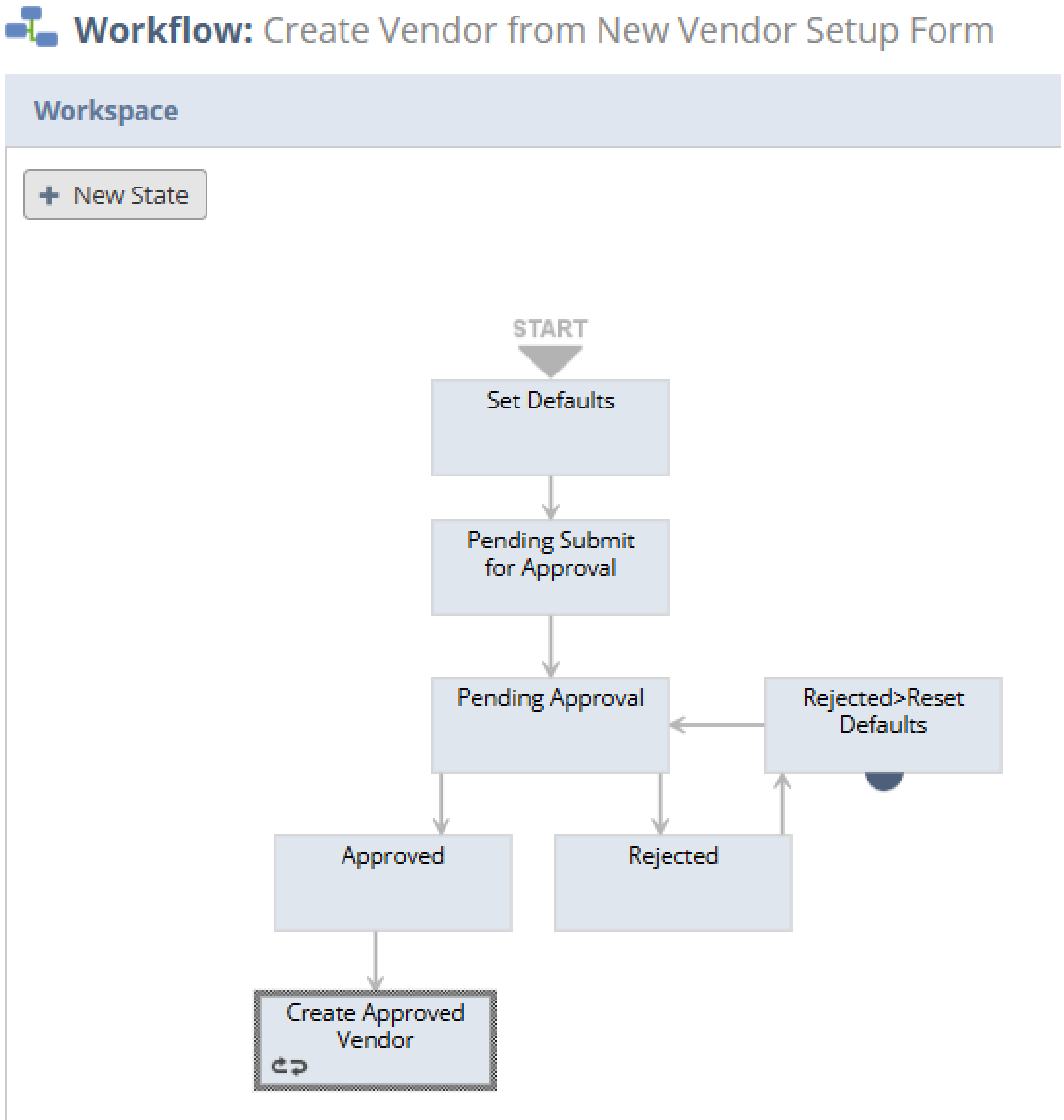
RECORD TYPE *
Vendor

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	

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



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
   - ***<u>**** 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.</u>***
   - ***<u>****Note you must put the Workflow in to View Mode before testing.</u>***

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

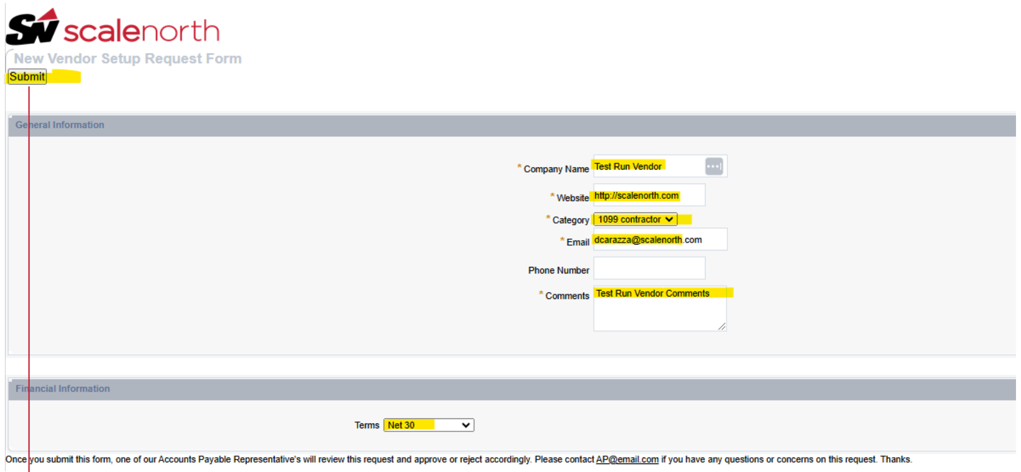
What follows are the screen shots for the steps above

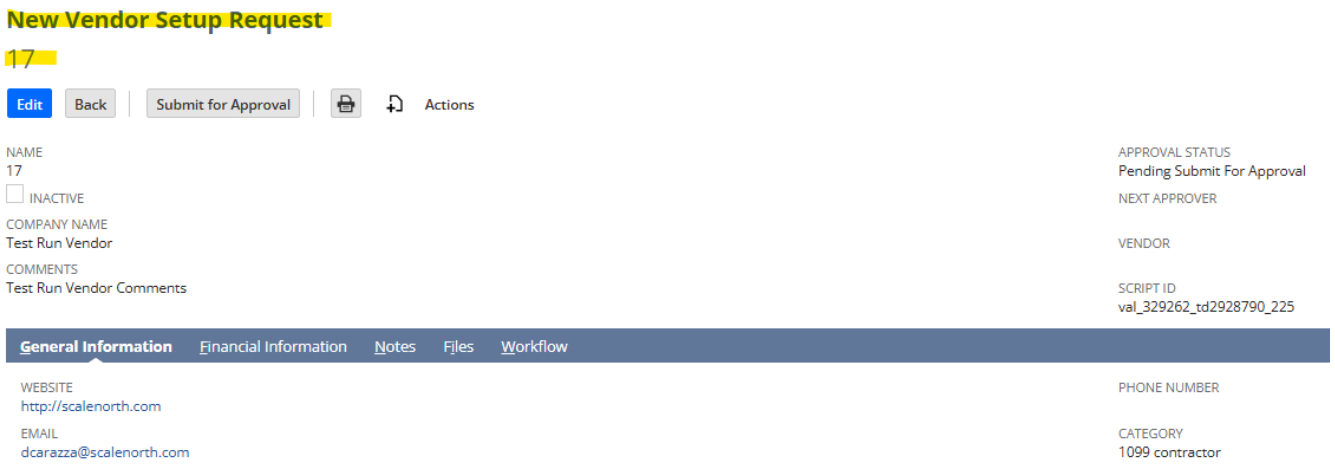
New Vendor Setup Request Online Form and Approval Workflow

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
- ***<u>****Note you must put the Workflow in to View Mode before testing.</u>***

1. Create a New Vendor Request using the online form we created



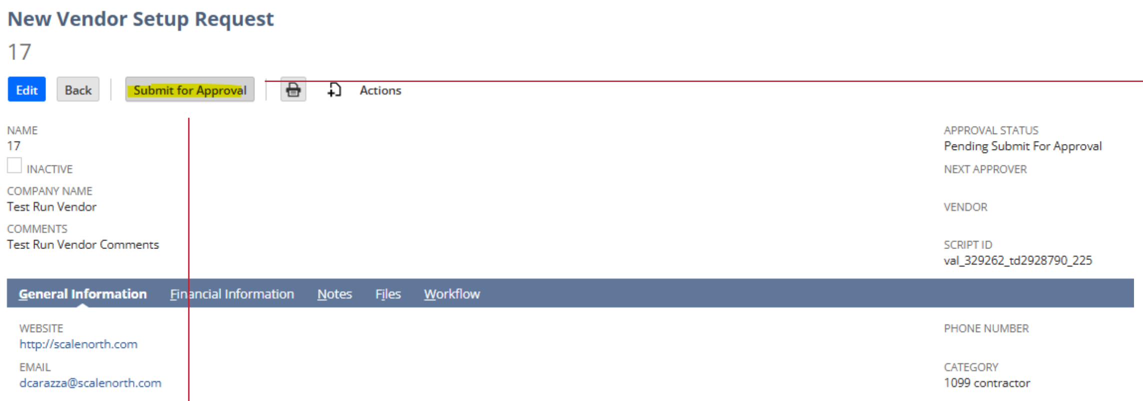


New Vendor Setup Request Online Form and Approval Workflow

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



Upon clicking submit for Approval expect the following:

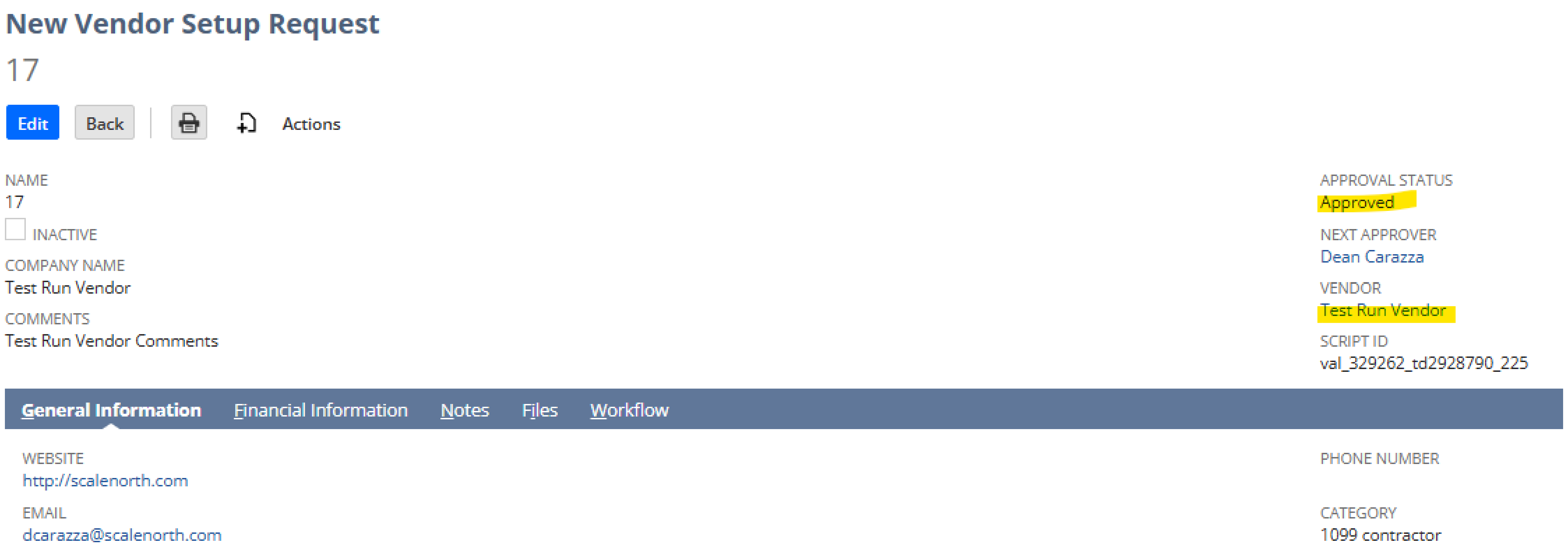
- Approval Status becomes Pending Approval
- Next Approver will be set to Me
- Will see Approve and Reject Buttons Available

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

New Vendor Setup Request Online Form and Approval Workflow

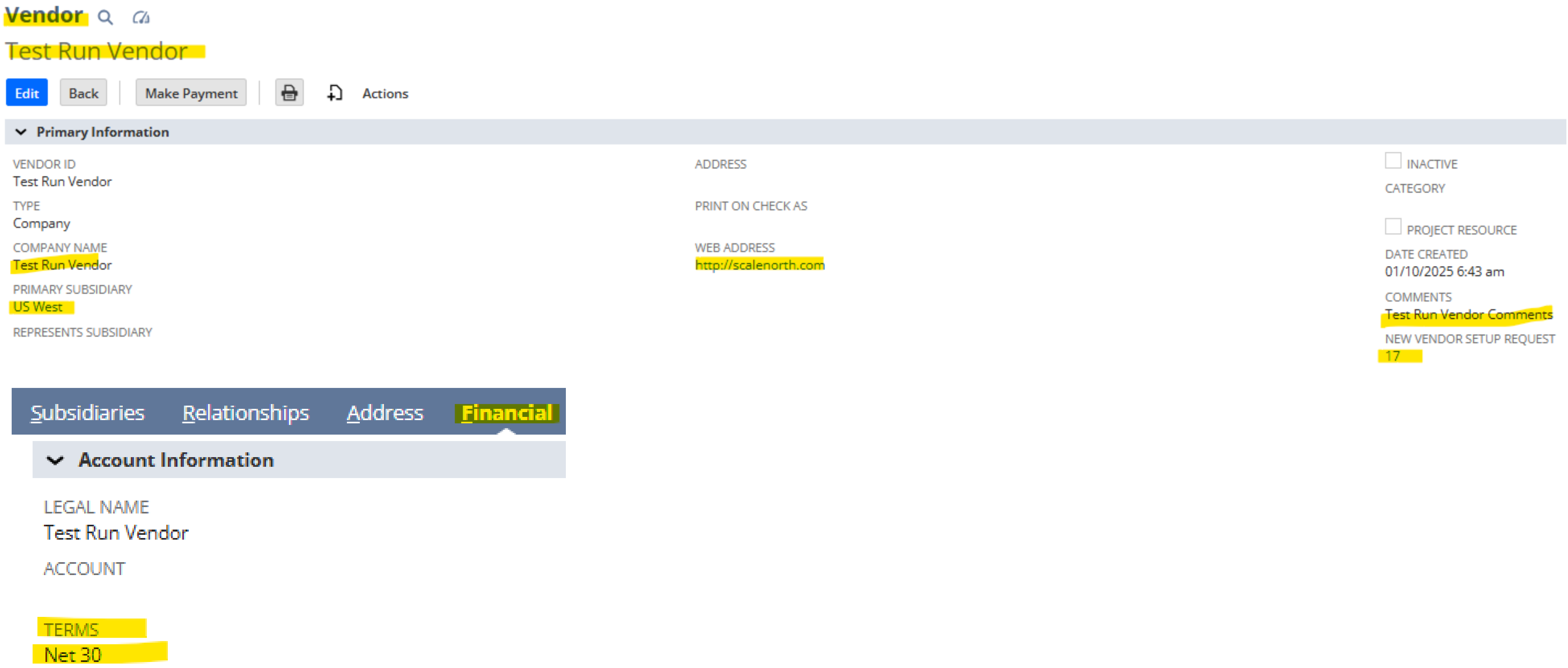
2. Test the Workflow
   - Now that we have finished our workflow we should test the workflow to see if working as expected. We will perform the following Test
   - ***<u>****Note you must put the Workflow in to View Mode before testing.</u>***

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



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

scalenorth

NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

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