scalenorth

ScaleNorth NetSuite MasterClass– Session 5– Automate Processes with Dynamic Forms and Workflows

February 21, 2025

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 a Credit Review Task for Customers >=90% of their Credit Limit
    - Saved Search
    - Scheduled Workflow with Saved Search Condition
    - Workflow to automate creating Credit Limit Review Task
    - Dynamic Task Form with dependent dropdowns via sourcing and filtering and making fields shown/visible and required
- 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

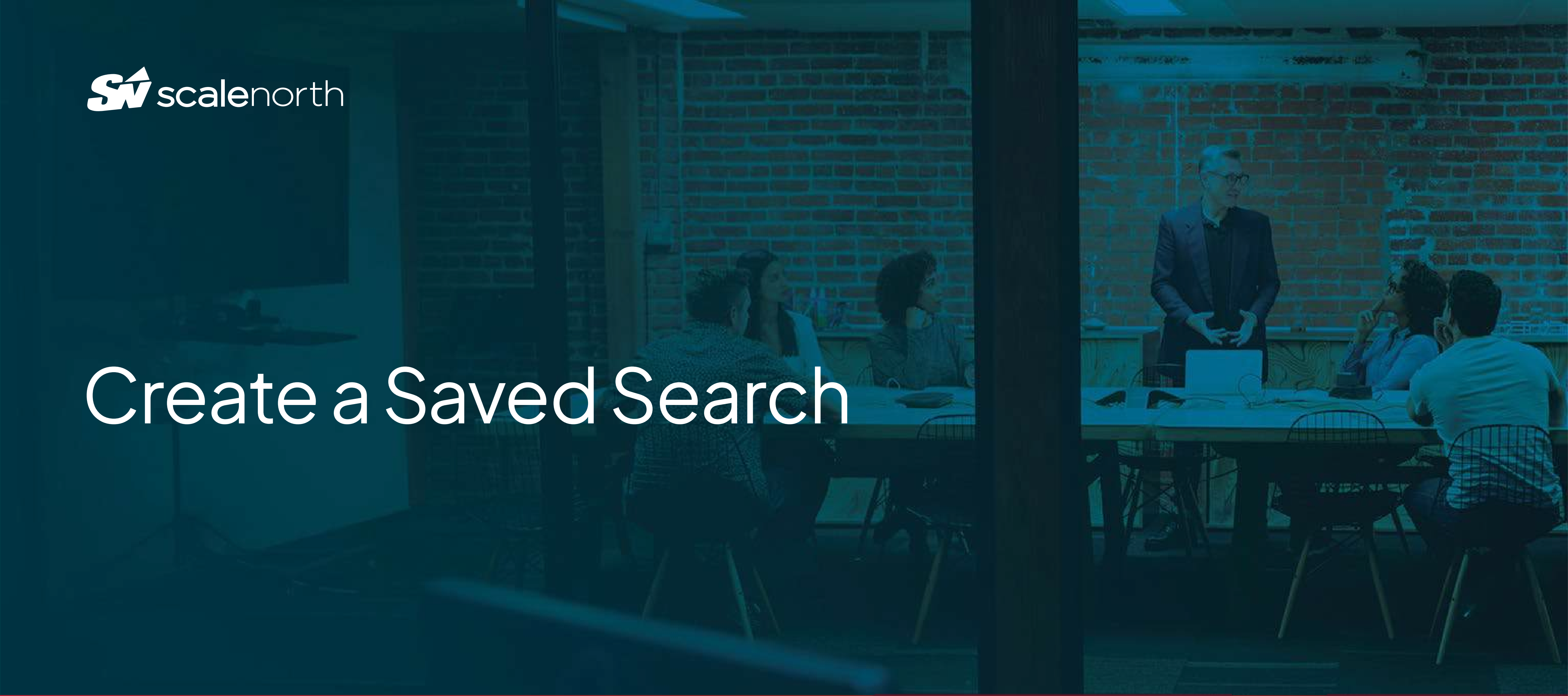
NetSuite Consulting & Managed Services

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

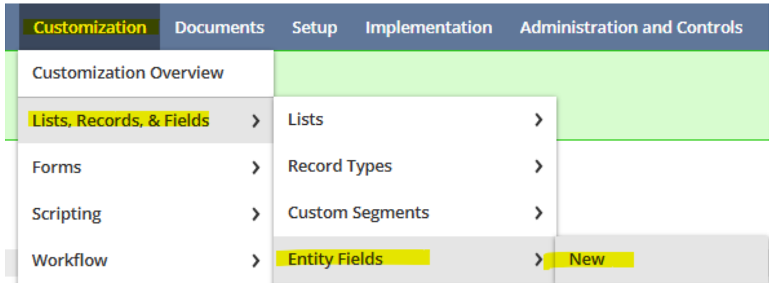
Automating a Credit Review Task for Customers>=90% of their Credit Limit

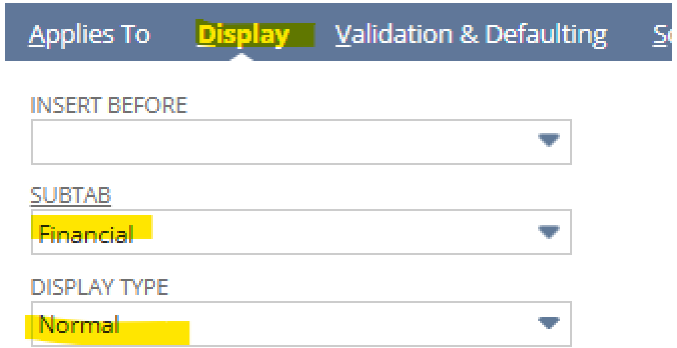


Create a Saved Search

Create a Saved Search

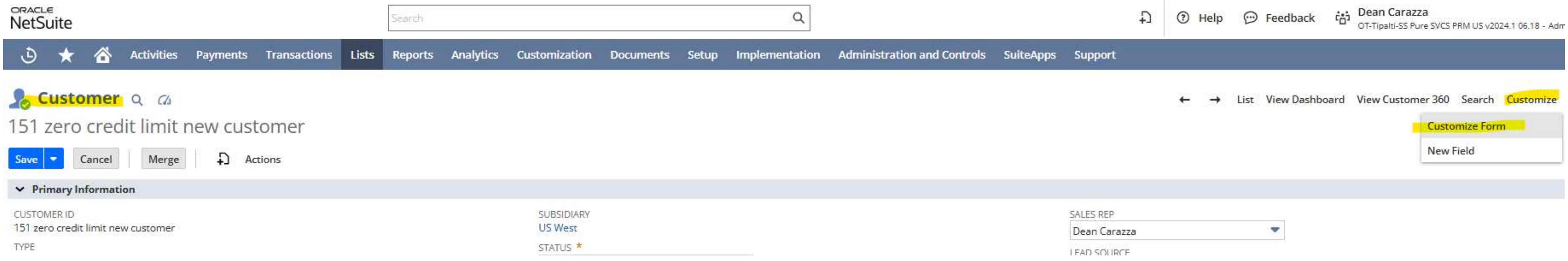
1. First we want to create any custom fields we will need for our saved search/workflow process
   - We want to create a Date Field that can be used as a Filter on the Customer Record to help override/control when the next automated Credit Review Task should be created. Example, if creating a scheduled workflow to run every 30 minutes, don't want it creating a credit review task every 30 minutes, so this field can allow us to control or override when the next automation should occur.
   - Navigate to Customization>Lists, Records, & Fields>Entity Fields>New



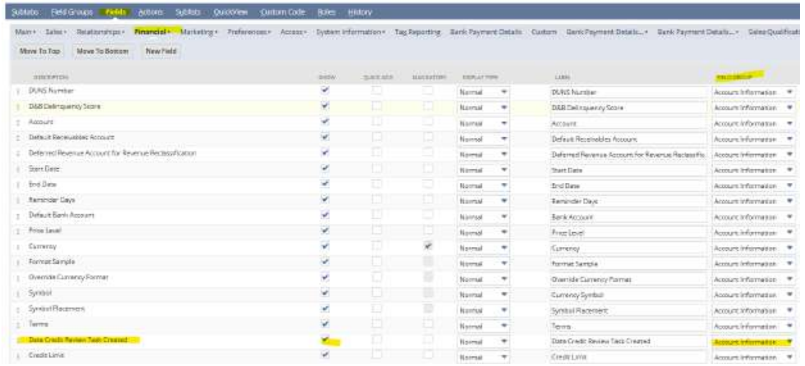


Create a Saved Search

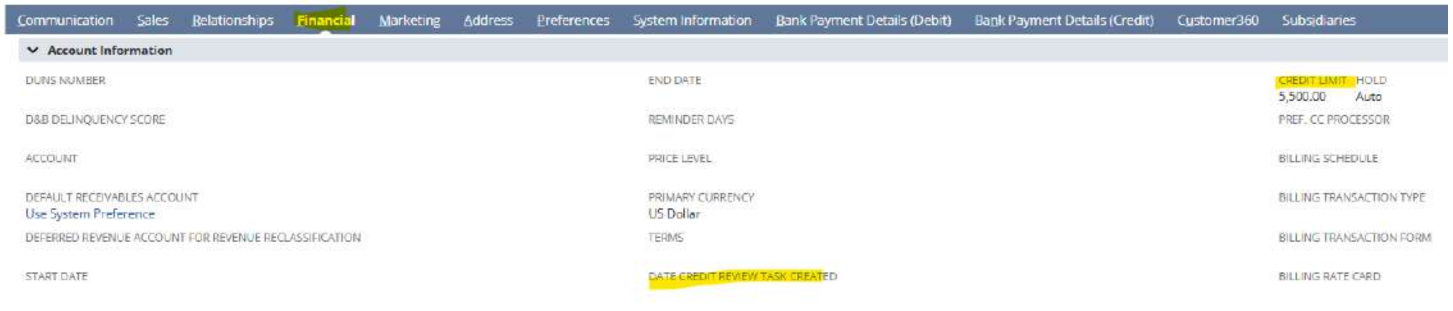
2. Next we can Customize the Customer Form so can have field show up where we want
   - Customize the Form so see field created and can re-position to show up in the account information section of the financial tab on the customer record
   - Bring up a Customer Record in Edit Mode>Click Customize Form



   - Click on Fields>Financial Subtab
     - Find the Field we created “Date Credit Review Task Created” and select the Field Group for Account Information and drag the field up above the Credit Limit Field

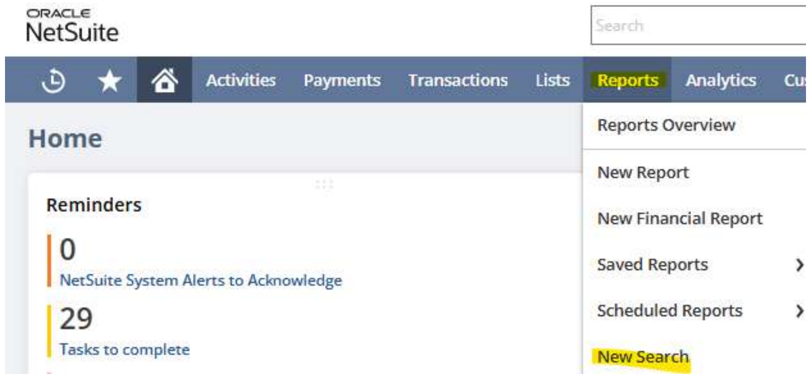


Customer Record:

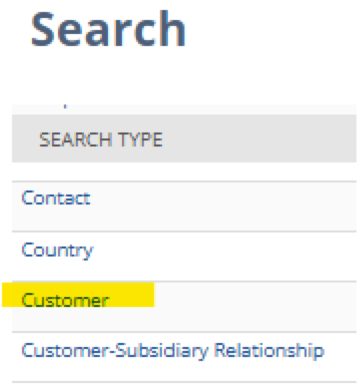


Create a Saved Search

3. Now that we have created the custom field we need, we can proceed to creating a saved search to identify customers whose balance is >=90% of their credit limit. What follows are the steps and screen shots to create the saved search that can then be used by our workflow we will create.
   - We want to create a Customer Saved Search
     - Navigate to Reports>New Search

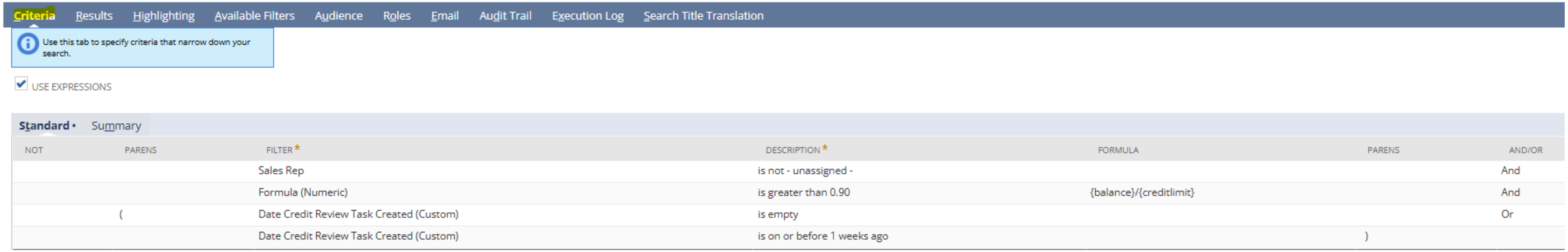


     - Select Customer



Create a Saved Search

4. What follows are the Criteria and Results setup used to create the Search
   - Criteria



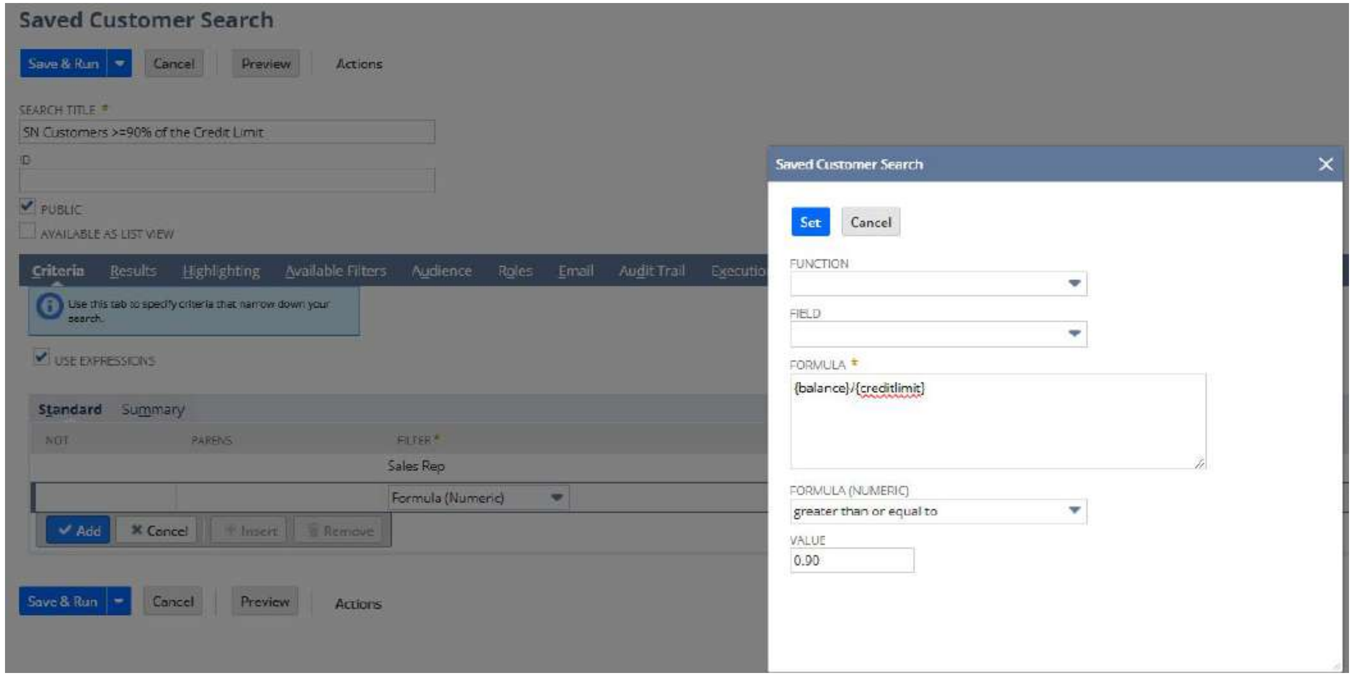
Criteria | Results | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log | Search Title Translation

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

USE EXPRESSIONS

Standard • Summary

NOT	PARENS	FILTER *	DESCRIPTION *	FORMULA	PARENS	AND/OR
		Sales Rep	is not - unassigned -			And
		Formula (Numeric)	is greater than 0.90	{balance}/{creditlimit}		And
	(	Date Credit Review Task Created (Custom)	is empty			Or
		Date Credit Review Task Created (Custom)	is on or before 1 weeks ago		)	



Create a Saved Search

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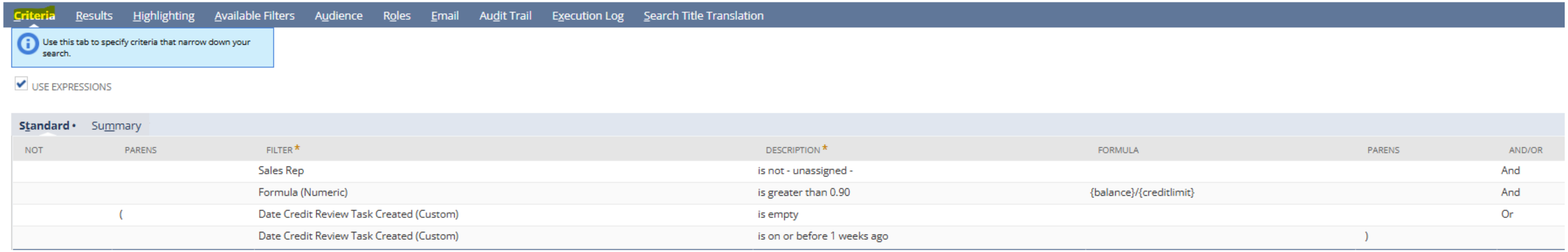
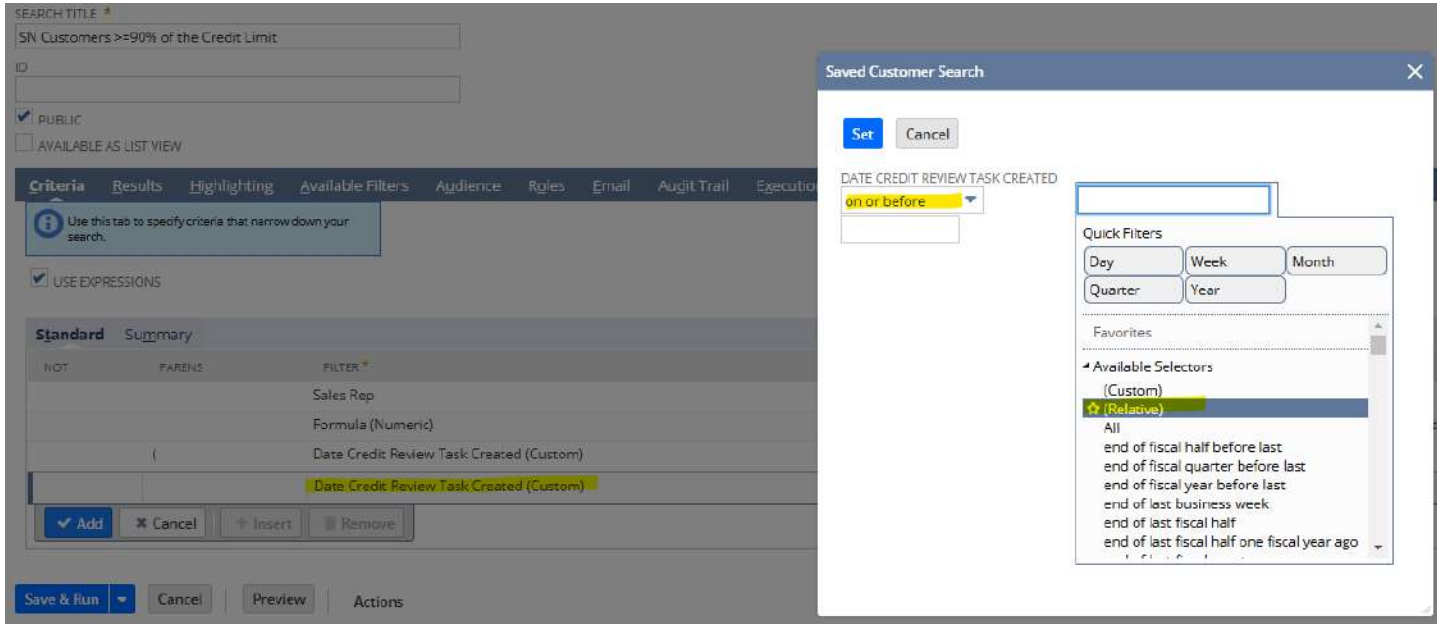
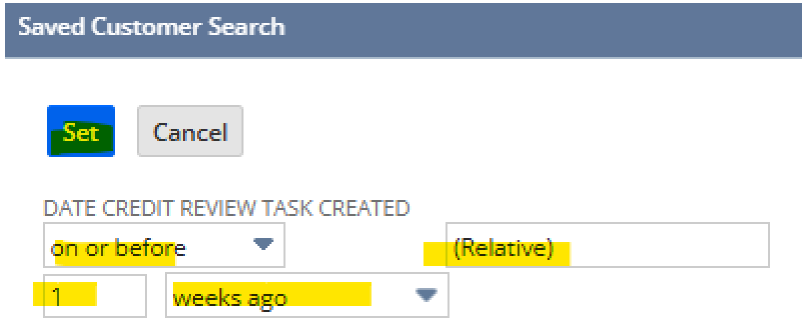






Create a Saved Search

4. What follows are the Criteria and Results setup used to create the Search
   - Results

SEARCH TITLE *
SN Customers >=90% of the Credit Limit

ID
customsearch2434

OWNER
Dean Carazza

☑ PUBLIC
☐ AVAILABLE AS LIST VIEW

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

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

SORT BY
ID ☐ DESCENDING

THEN BY
☐ DESCENDING

THEN BY
☐ DESCENDING

OUTPUT TYPE
Normal

☐ SHOW TOTALS

MAX RESULTS

☐ RUN UNRESTRICTED ☐ DISALLOW

☐ MY PREFERRED SEARCH RESULTS

Columns • | Drill Down Fields

Remove all | Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL
ID					
Name					
Sales Rep					
Email					
Phone					
Office Phone					
Fax					
Credit Limit					
Balance					
Formula (Percent)			{balance}/{creditlimit}		% of Credit Limit
Date Credit Review Task Created (Custom)					

Create a Saved Search

5. Now we can save>Run our search to see what initial results look like
   - Looks like 12 Customers that are >=90% of their credit limit. We can now proceed to setting up a workflow that will use this search to automate creating a Credit Review Task for these customers and future customers who are >=90% of their credit limit.

SN Customers >=90% of the Credit Limit: Results

Learn about NetSuite Analytics Warehouse List Search Audit Trail

Edit this Search | Add

FILTERS

STYLE
Normal

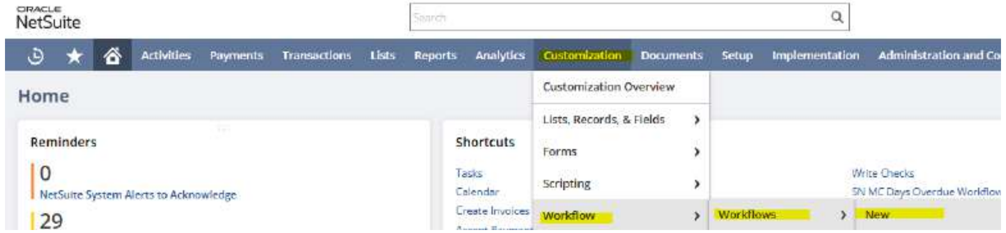
EDIT TOTAL: 12

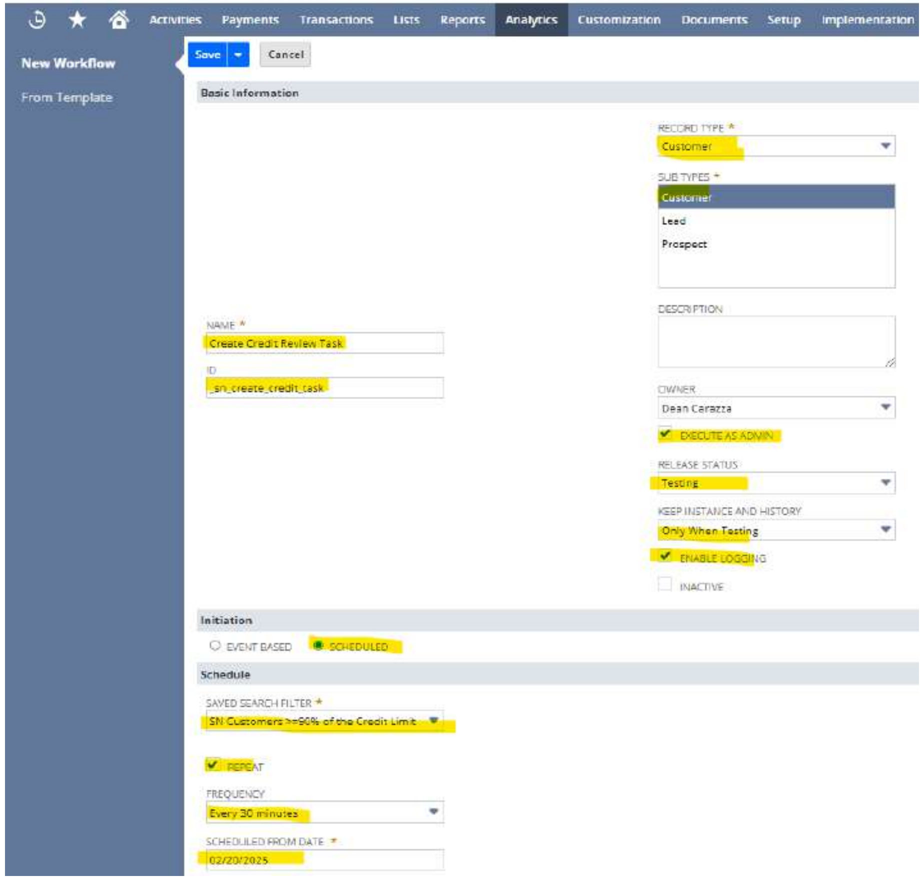
NEW	EDIT | VIEW	INTERNAL ID	ID	NAME	SALES REP	EMAIL	PHONE	OFFICE PHONE	FAX	CREDIT LIMIT	BALANCE	% OF CREDIT LIMIT	DATE CREDIT REVIEW TASK CREATED
	Edit | View	2489	139	Test-Over Credit Limit Customer	Dean Carazza					20,000.00	19,000.00	95.0%	
	Edit | View	2490	140	V2 Over Credit Limit	Dean Carazza					10,000.00	9,500.00	95.0%	
	Edit | View	2491	141	V3 Credit Limit Review	Dean Carazza					5,000.00	4,800.00	96.0%	
	Edit | View	2492	142	V4 Credit Limit Review	Dean Carazza					100,000.00	92,000.00	92.0%	
	Edit | View	2493	143	V5 Test	Dean Carazza					30,000.00	28,500.00	95.0%	
	Edit | View	2494	144	V6 Test Credit Limit	Dean Carazza					5,000.00	4,700.00	94.0%	
	Edit | View	2496	146	V7 Test Credit Limit	Dean Carazza					10,000.00	9,500.00	95.0%	
	Edit | View	2497	147	V8 Credit Limit Test	Dean Carazza					10,000.00	9,800.00	98.0%	
	Edit | View	2498	148	V9 Test Credit Customer	Dean Carazza					10,000.00	9,400.00	94.0%	
	Edit | View	2499	149	V10 Test Credit Limit	Dean Carazza					10,000.00	9,700.00	97.0%	
	Edit | View	2500	150	V11 Test Credit Limit	Dean Carazza					10,000.00	9,700.00	97.0%	
	Edit | View	2501	151	zero credit limit new customer	Dean Carazza					5,500.00	5,000.00	90.9091%	

Create Scheduled Workflow

Create a Scheduled Workflow with Saved Search Condition

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

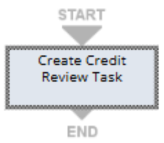




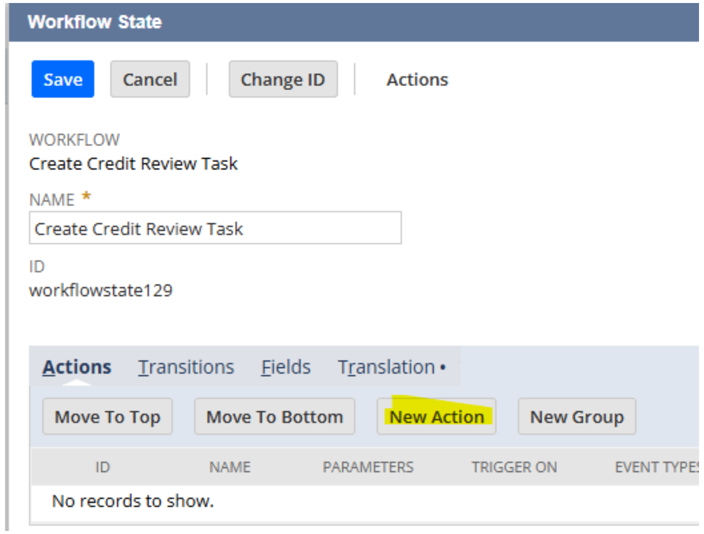
Create a Scheduled Workflow with Saved Search Condition

2. Create our State and Actions

- Double click in the State 1 to rename our State and Save



- Add our two workflow actions
  - Double click the State to bring back up so can
    - Create a Task Record
    - Set the Date Credit Review Task Created = Today



Create a Scheduled Workflow with Saved Search Condition

2. Create our State and Actions
   - Add our two workflow actions
     - Create a Task Record

New Action

TYPE
3Way Check Subs Match Field WS (Custor
Add Button
Confirm
Create Record

Parameters

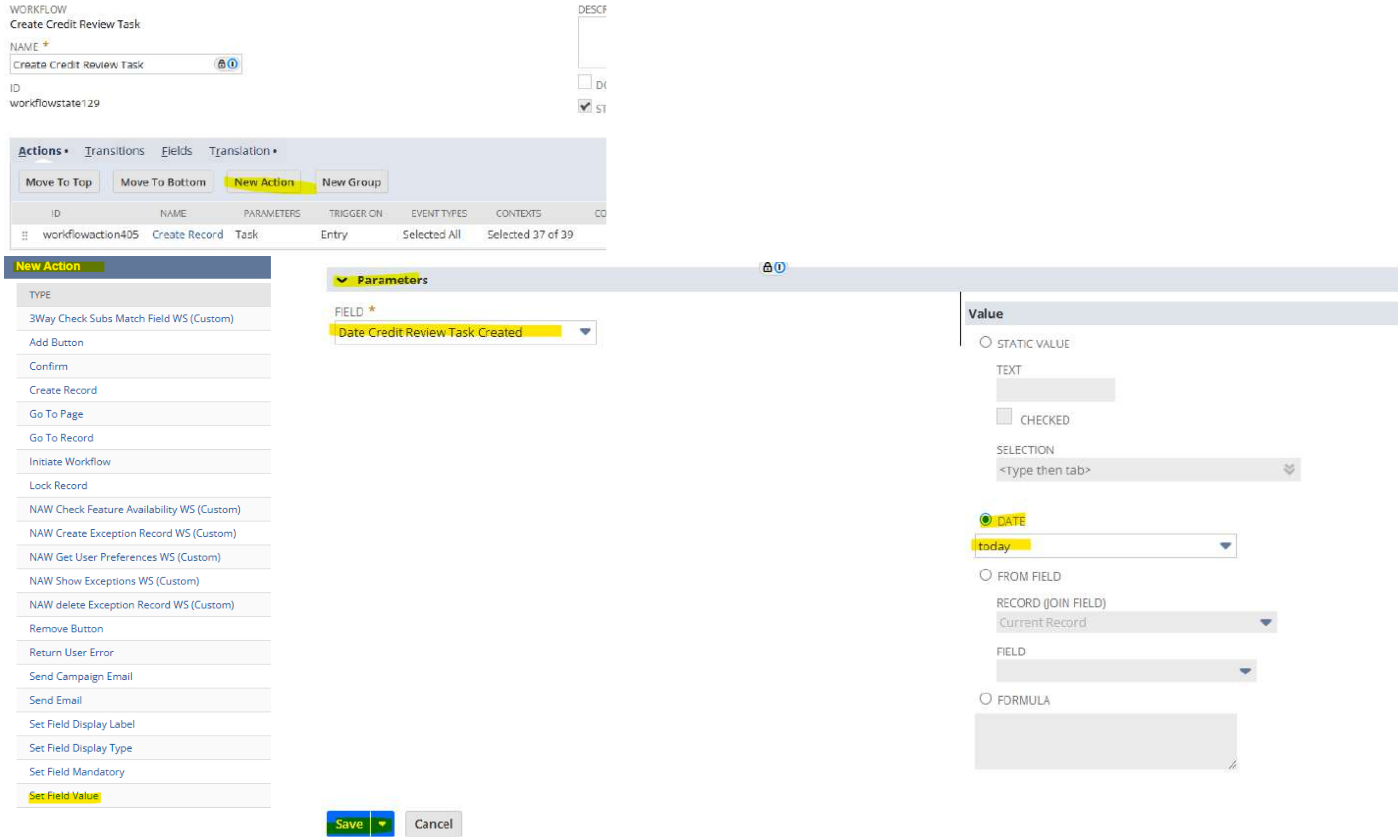
RECORD TYPE *: Task

STORE RESULT IN:

FIELD *	TEXT	CHECKED	DATE	SELECTION	JOIN	VALUE FIELD
Title	Credit Review					
Company				Current Record		
Assigned						Sales Rep
Due Date			two days from now			

Create a Scheduled Workflow with Saved Search Condition

2. Create our State and Actions
   - Add our two workflow actions
     - Set the Date Credit Review Task Created = Today



Create a Scheduled Workflow with Saved Search Condition

2. Create our State and Actions
   - Can see our two workflow actions we added below

WORKFLOW
Create Credit Review Task

NAME *
Create Credit Review Task

ID
workflowstate129

DESCRIPTION

☐ DO NOT EXIT WORKFLOW

☑ START STATE

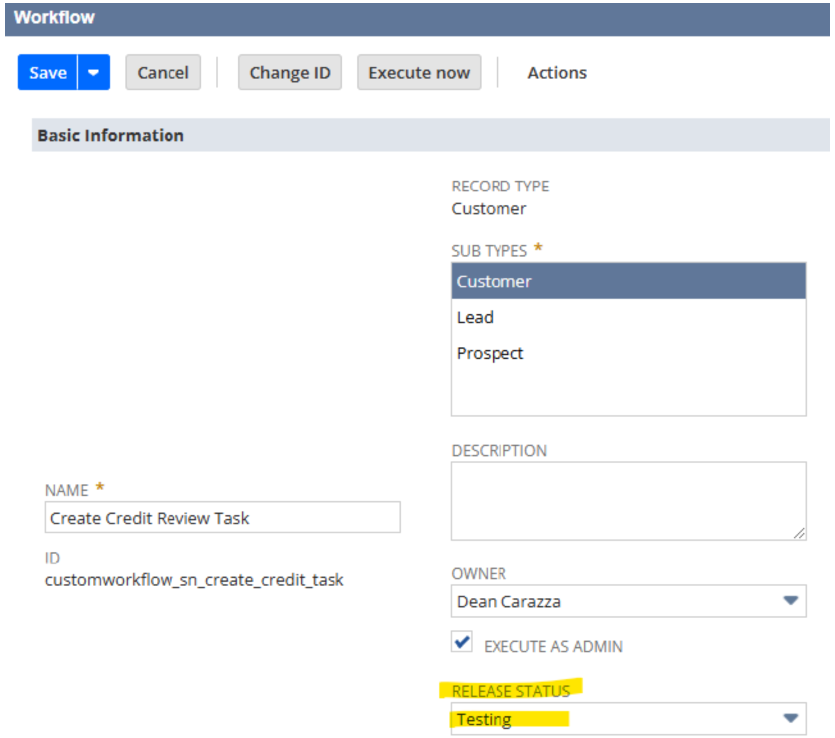
Actions • Transitions Fields Translation •

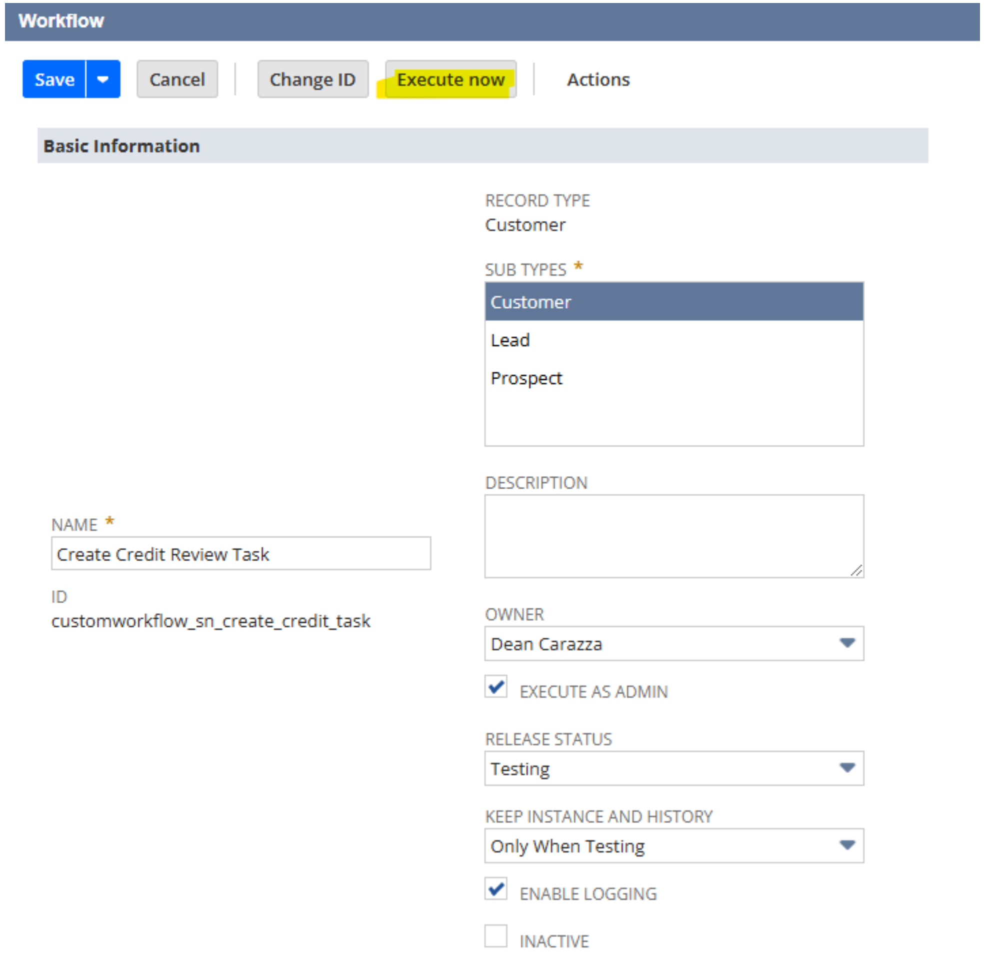
Move To Top | Move To Bottom | New Action | New Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction405	Create Record	Task	Entry	Selected All	Selected 37 of 39							✔
workflowaction406	Set Field Value	Date Credit Review Task Created=today	Entry	Selected All	Selected 37 of 39							✔

Create a Scheduled Workflow with Saved Search Condition

3. Now we can test our workflow
   - Note for the workflow to run on schedule you must change the Release Status to Released. However, since we don't want to have to wait 30 minutes to test, while in testing mode we can hit the execute now button to fire the workflow. Expectation is that all 12 search results will get picked up and processed.

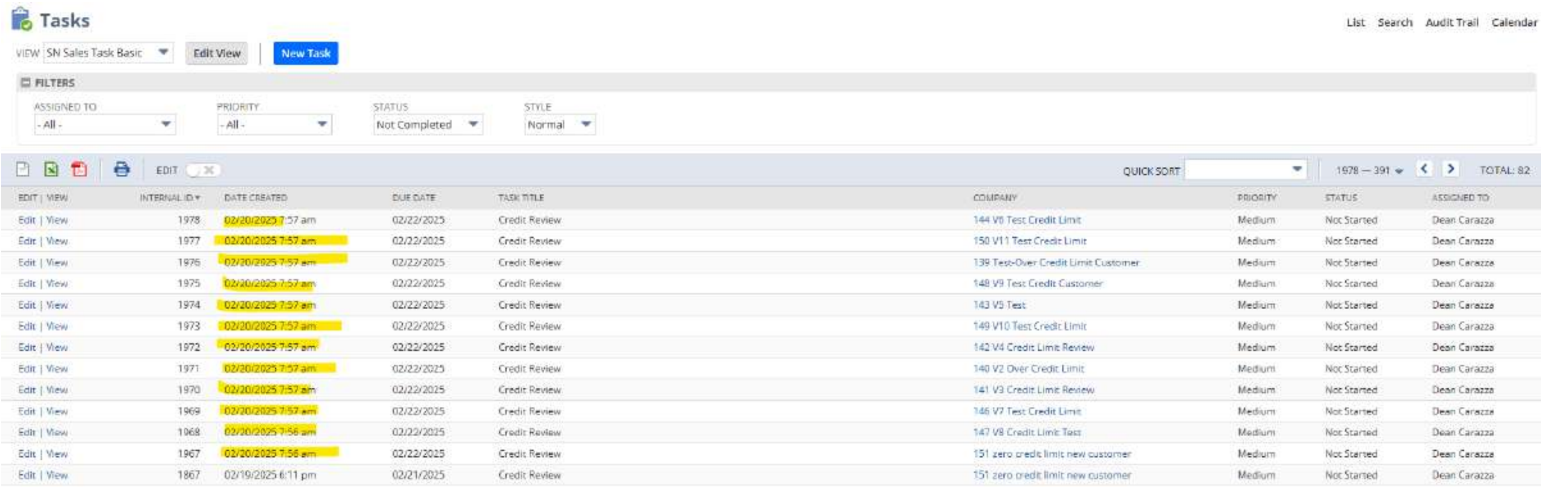




Create a Scheduled Workflow with Saved Search Condition

3. Now we can test our workflow
   - Can see that after executing now the Saved Search Results are now empty meaning all 12 records got processed

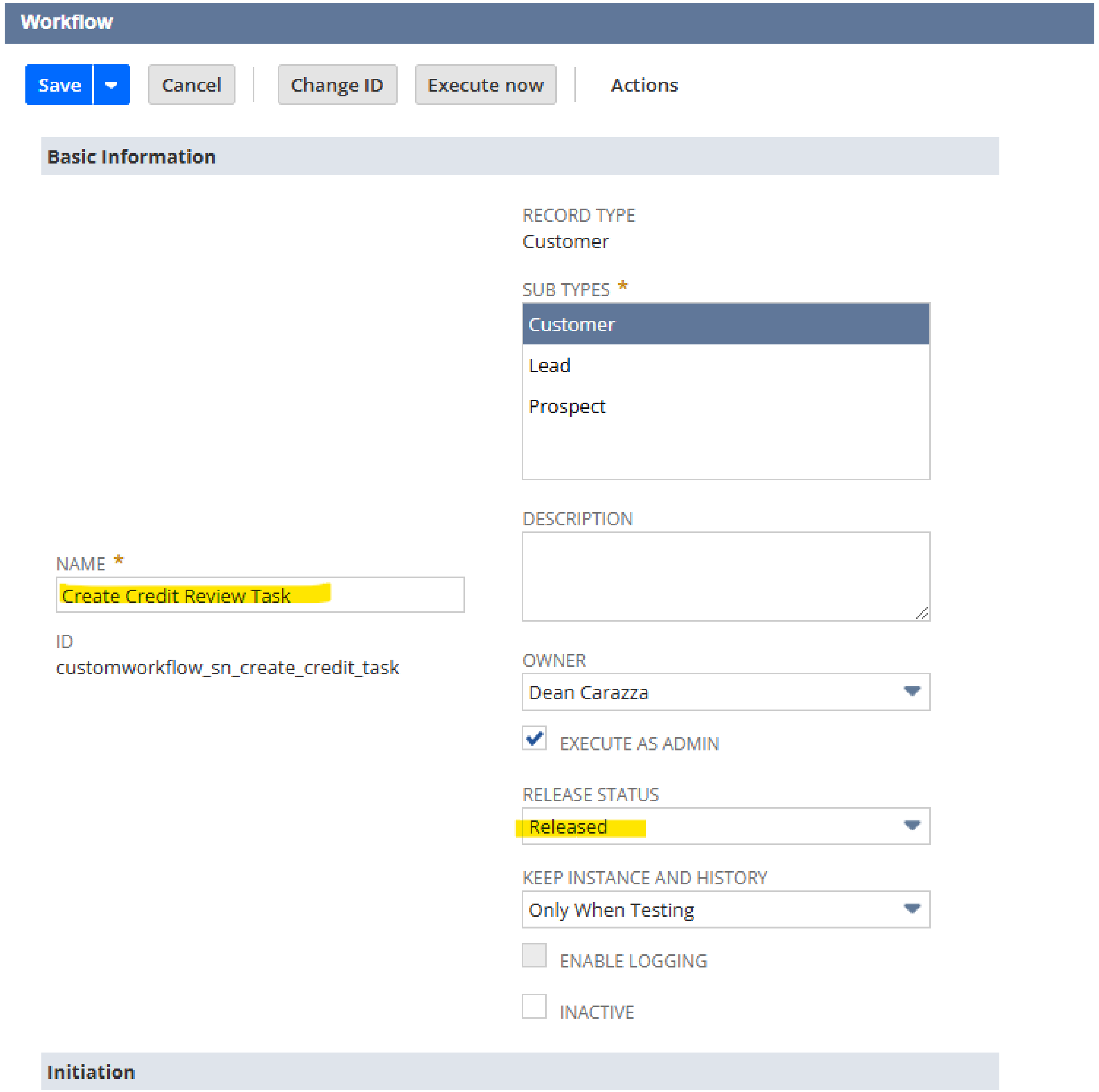
   - If bring up a task list can see the 12 that got created for those customers
     - Navigate to Activities>Scheduling>Tasks>
     - If sort by date created newest to oldest will see the



EDIT | VIEW	INTERNAL ID ▾	DATE CREATED	DUE DATE	TASK TITLE	COMPANY	PRIORITY	STATUS	ASSIGNED TO
Edit | View	1978	02/20/2025 7:57 am	02/22/2025	Credit Review	144 V6 Test Credit Limit	Medium	Not Started	Dean Carazza
Edit | View	1977	02/20/2025 7:57 am	02/22/2025	Credit Review	150 V11 Test Credit Limit	Medium	Not Started	Dean Carazza
Edit | View	1976	02/20/2025 7:57 am	02/22/2025	Credit Review	139 Test-Over Credit Limit Customer	Medium	Not Started	Dean Carazza
Edit | View	1975	02/20/2025 7:57 am	02/22/2025	Credit Review	148 V9 Test Credit Customer	Medium	Not Started	Dean Carazza
Edit | View	1974	02/20/2025 7:57 am	02/22/2025	Credit Review	143 V5 Test	Medium	Not Started	Dean Carazza
Edit | View	1973	02/20/2025 7:57 am	02/22/2025	Credit Review	149 V10 Test Credit Limit	Medium	Not Started	Dean Carazza
Edit | View	1972	02/20/2025 7:57 am	02/22/2025	Credit Review	142 V4 Credit Limit Review	Medium	Not Started	Dean Carazza
Edit | View	1971	02/20/2025 7:57 am	02/22/2025	Credit Review	140 V2 Over Credit Limit	Medium	Not Started	Dean Carazza
Edit | View	1970	02/20/2025 7:57 am	02/22/2025	Credit Review	141 V3 Credit Limit Review	Medium	Not Started	Dean Carazza
Edit | View	1969	02/20/2025 7:57 am	02/22/2025	Credit Review	146 V7 Test Credit Limit	Medium	Not Started	Dean Carazza
Edit | View	1968	02/20/2025 7:56 am	02/22/2025	Credit Review	147 V8 Credit Limit Test	Medium	Not Started	Dean Carazza
Edit | View	1967	02/20/2025 7:56 am	02/22/2025	Credit Review	151 zero credit limit new customer	Medium	Not Started	Dean Carazza
Edit | View	1867	02/19/2025 6:11 pm	02/21/2025	Credit Review	151 zero credit limit new customer	Medium	Not Started	Dean Carazza

Create a Scheduled Workflow with Saved Search Condition

4. After testing and confirmed working you can release the workflow



Create Dynamic Task Form with Dependent Dropdowns and Required Fields

Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

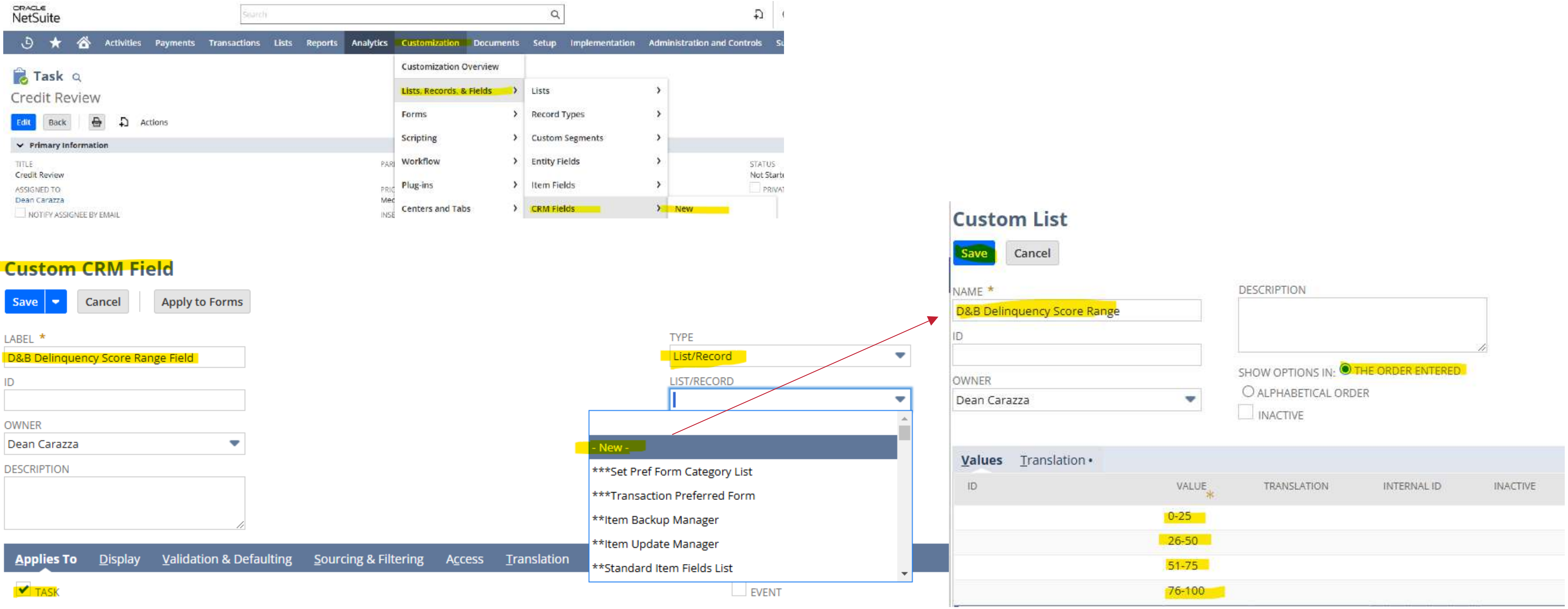
- Use Case
  - When a user has been assigned a credit review task, we want them to fill out the customer's current D&B Delinquency Score Range. Based on that input will show what corresponding Terms options are available. The lower the D&B Delinquency Score Range the less favorable Terms are available for that customer.

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

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

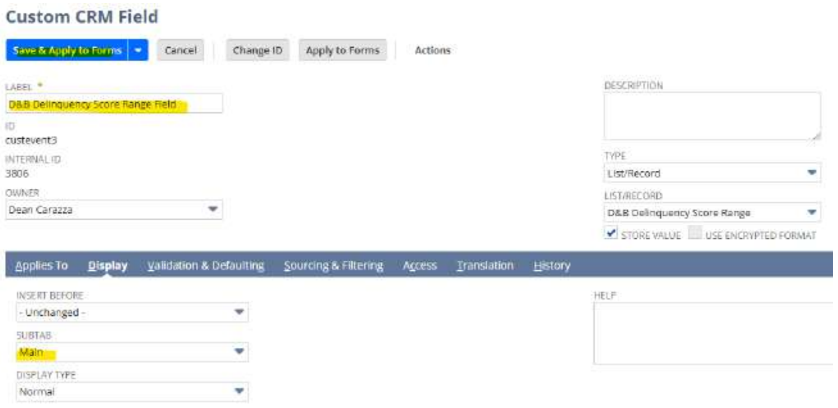
Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

1. What follows are the steps to create the custom field and custom record and field needed for dependent dropdowns.
   - Create the D&B Delinquency Score Range Field
     - Navigate to Customization>Lists, Records, & Fields>CRM Fields>New



Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

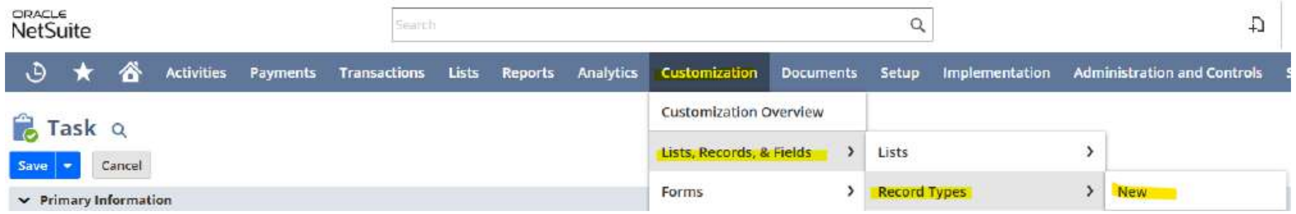
1. What follows are the steps to create the custom field and custom record and field needed for dependent dropdowns.
   - Create the D&B Delinquency Score Range Field
     - Display on the Main Subtab

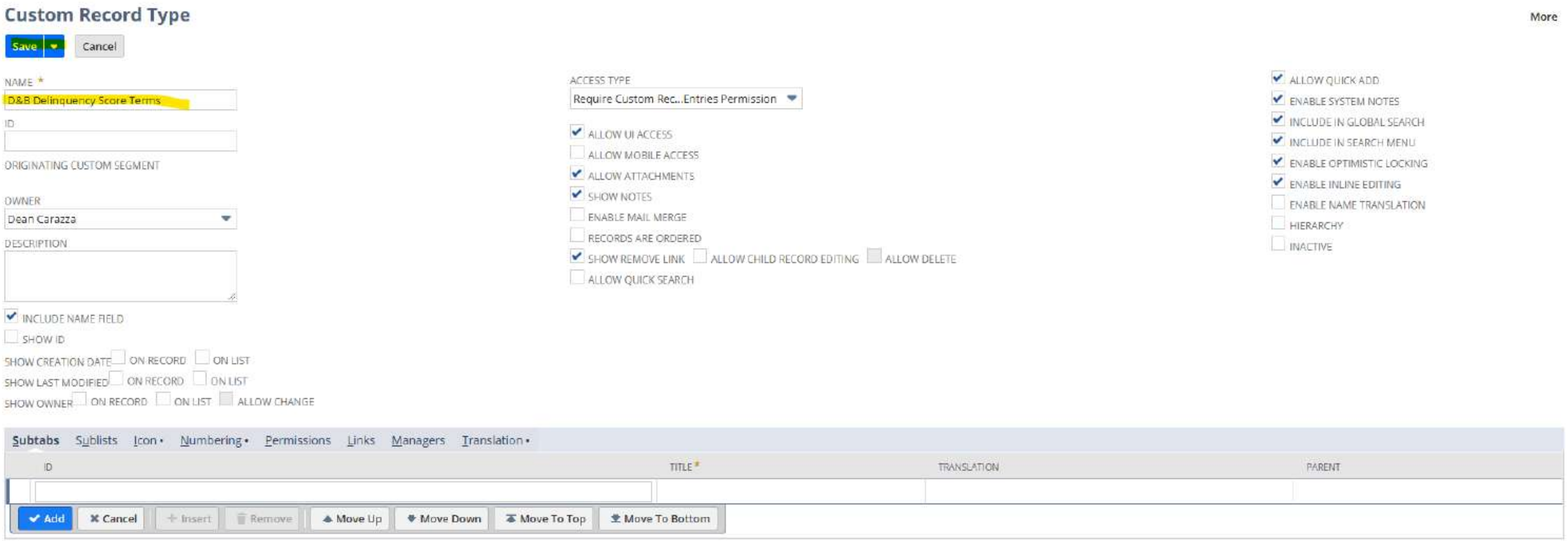


     - Save the Field and then you can view an existing or New Task to see the field

Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

2. Next we need to create the Custom Record for Terms and custom Field that can be used as filter for a dependent drop down.
   - Note this is not the native terms field, but just used so we can tag for reporting and to see if should consider taking action if the native terms on the customer record are not aligned with this field on the credit review task.
   - To create custom record navigate to Customization>Lists, Records, & Fields>Record Types>New

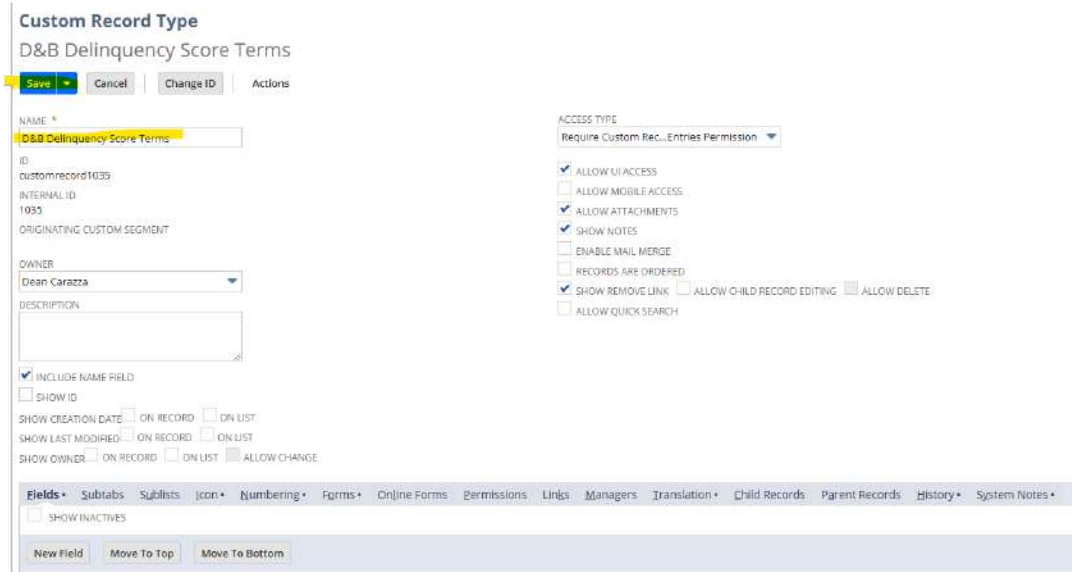




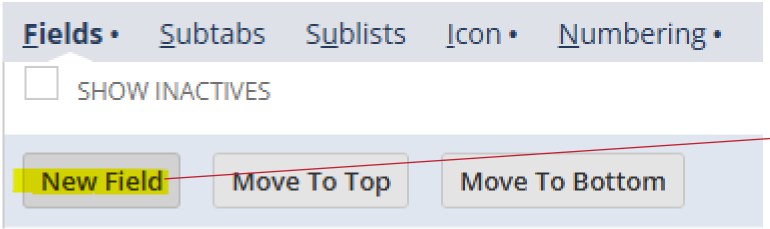
Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

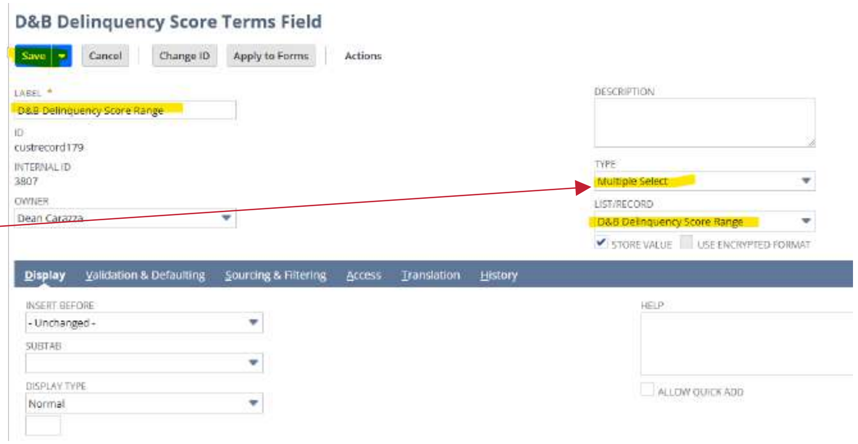
2. Next we can create a field on our Custom Record that references our D&B Delinquency Score Field we created on our task record as a list/record. By doing so this field on the custom record will serve as the join/mapping for the dependent D&B Delinquency Terms field.

- Name and Save the Record



- Create a New Field





Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

2. After saving the Custom Record and New Field, you can start creating the custom record entries for Terms and map them to the corresponding D&B Delinquency Range that should be allowed
   - Example
     - 0–25 = Prepaid
     - 26–50 = Prepaid, Due on Receipt
     - 51–75 = Prepaid, Due on Receipt, Net 15, Net 20
     - 76–100 = Prepaid, Due on Receipt, Net 15, Net 20, Net 30
   - To add a new Custom Record entry hover over more and select View Records

   - Then you can hit New D&B Delinquency Score Terms to create new entry, can see when creating the entry you can map to the corresponding D&B Delinquency Range Field to match the table above

Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

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   - Example
     - 0–25 = Prepaid
     - 26–50 = Prepaid, Due on Receipt
     - 51–75 = Prepaid, Due on Receipt, Net 15, Net 20
     - 76–100 = Prepaid, Due on Receipt, Net 15, Net 20, Net 30
   - Finish adding the remaining Records to complete the mapping above

Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

2. After saving the Custom Record and New Field, you can start creating the custom record entries for Terms and map them to the corresponding D&B Delinquency Range that should be allowed
   - Example
     - 0–25 = Prepaid
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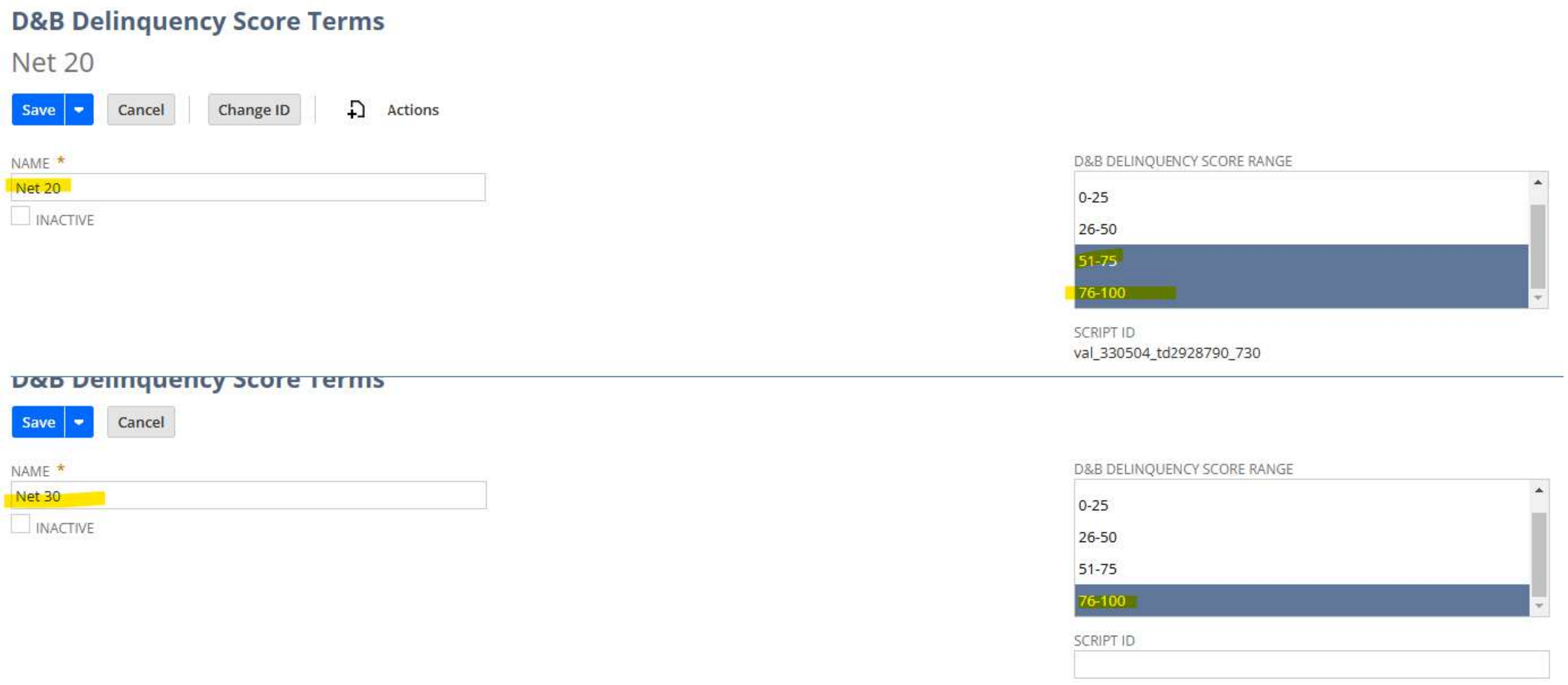
     - 76–100 = Prepaid, Due on Receipt, Net 15, Net 20, Net 30
   - Finish adding the remaining Records to complete the mapping above



Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

2. Can see what the created custom record entries and mapping looks like in list view once done creating

D&B Delinquency Score Terms List

VIEW Custom Default | Edit View | New D&B Delinquency Score Terms

FILTERS

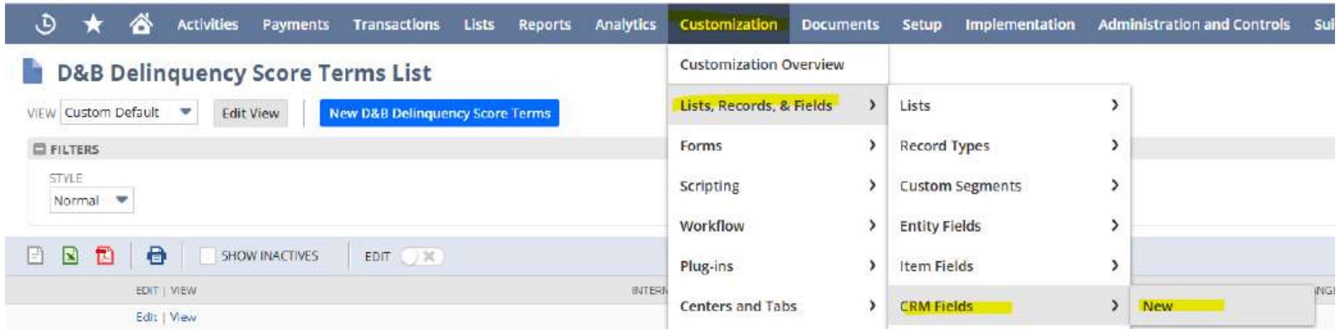
STYLE
Normal

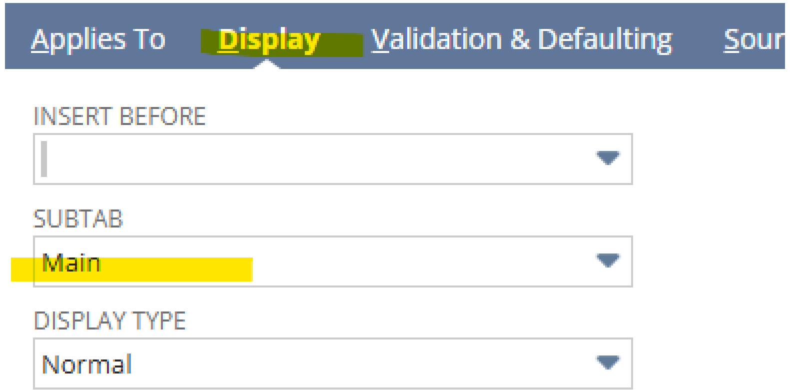
SHOW INACTIVES EDIT

EDIT | VIEW	INTERNAL ID ▲	NAME	D&B DELINQUENCY SCORE RANGE
Edit | View	1	Prepaid	0-25,26-50,51-75,76-100
Edit | View	2	Due on Receipt	26-50,51-75,76-100
Edit | View	3	Net 15	51-75,76-100
Edit | View	4	Net 20	51-75,76-100
Edit | View	5	Net 30	76-100

Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

3. Now that we have created our custom record and custom record field, we can add a custom field to the Task record that can reference our custom record entries as a list.
   - Navigate to Customization>Lists, Records, & Fields>CRM Fields>New



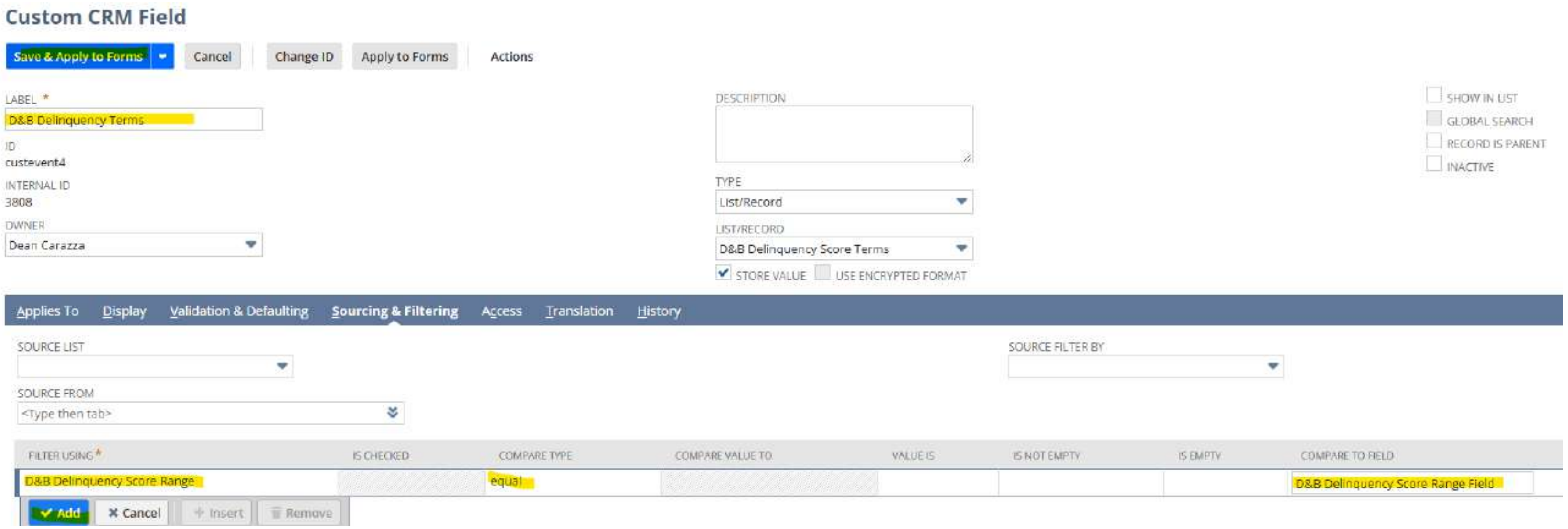


   - Save and Apply to Forms

Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

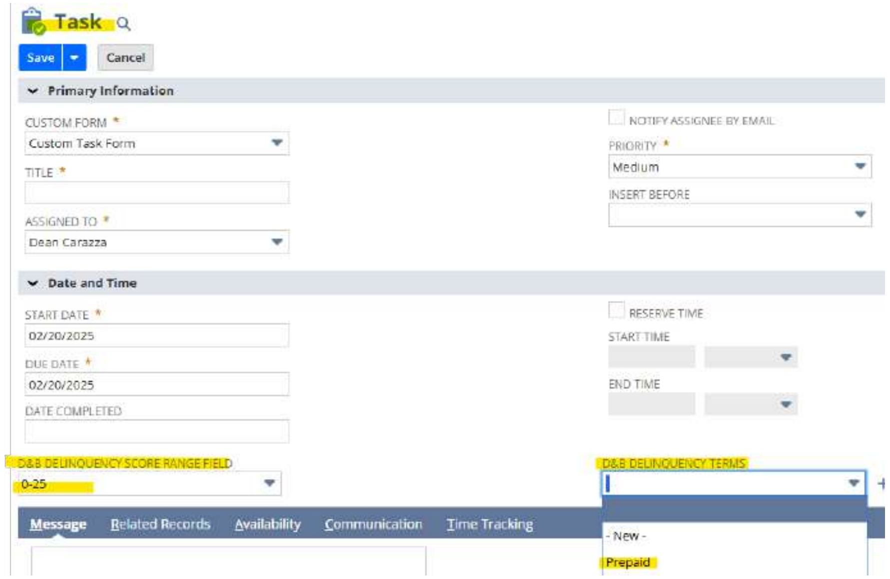
4. Now we can add sourcing and filtering to have a dependent dropdown.
   - Navigate to our field D&B Delinquency Terms
     - Customization>Lists, Records, & Fields>CRM Fields
     - Click on the D&B Delinquency Terms Field

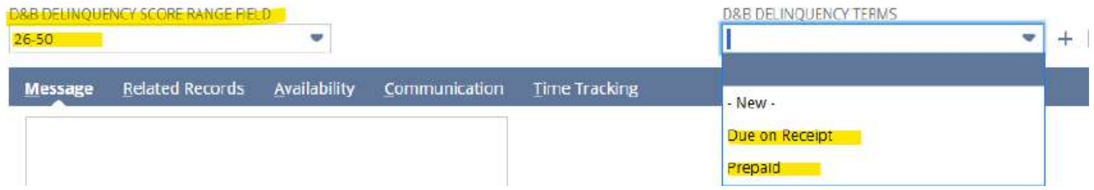
     - Click on Sourcing and Filtering Subtab – Complete like below and Save



Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

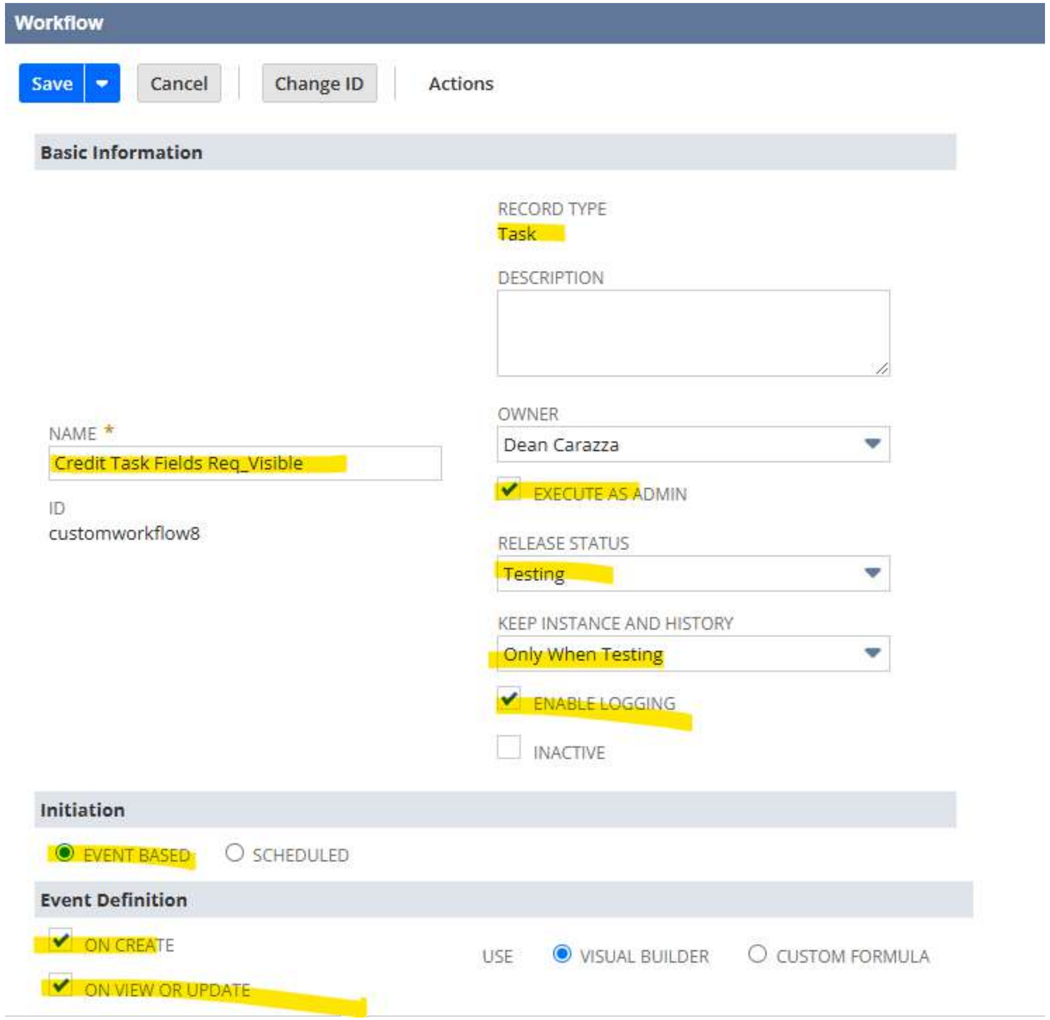
5. Now we can test to see if our dependent drop down is working after we added filtering to the field to source from the D&B Delinquency Score Range selected on the task record to match to the mapped Score Range on the Custom Record entries for Terms.
   - Edit an existing or create a new task
   - Can see that when select a specific D&B Delinquency Rage in dropdown, it limits the available dropdowns in the D&B Delinquency Terms Field





Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

6. Now that we have our dependent drop-down field working. We can make the D&B Delinquency Score Range and D&B Delinquency Terms Fields Required and show only if the Task Title = Credit Review
   - Below are the Screen Shots of the Workflow Created and Related Actions that were added to accomplish this.



Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

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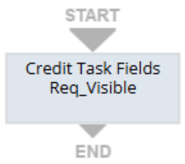

Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

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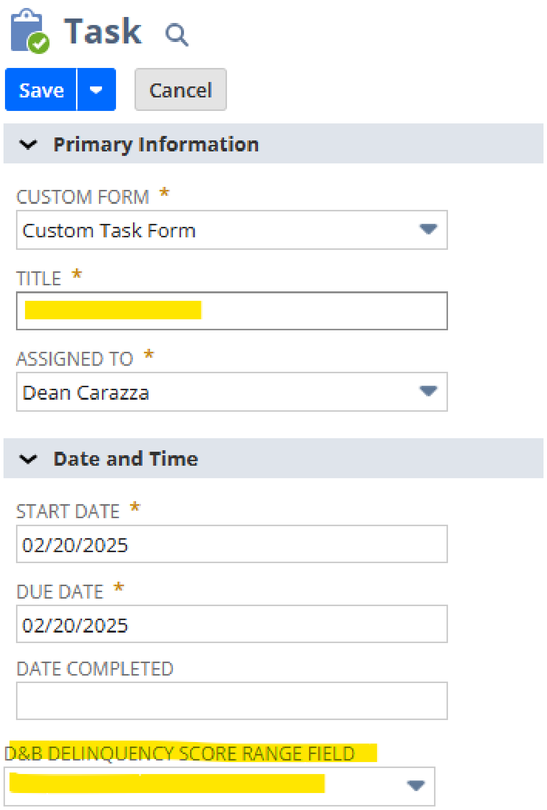
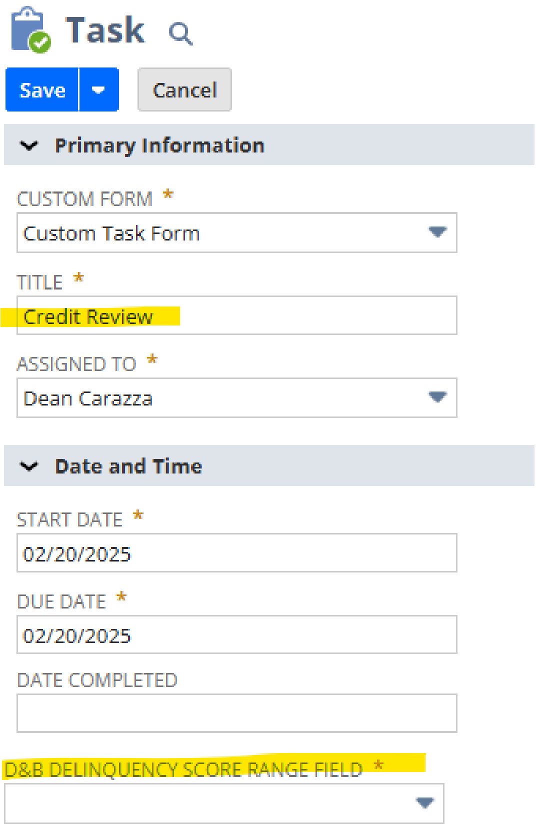
   - Below are the Screen Shots of the Workflow Created and Related Actions that were added to accomplish this.

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaction435	Set Field Display Type	V2 D&B Delinquency Terms = HIDDEN	Before Record Load	Selected All	Selected 37 of 39	V2 D&B Delinquency Score Range Is Empty						✓
workflowaction436	Set Field Display Type	V2 D&B Delinquency Terms = NORMAL	Before Record Load	Selected All	Selected 37 of 39	V2 D&B Delinquency Score Range Is Not Empty						✓
workflowaction437	Set Field Mandatory	V2 D&B Delinquency Terms = True	Before Record Load	Selected All	Selected 37 of 39	V2 D&B Delinquency Score Range Is Not Empty						✓
workflowaction438	Set Field Mandatory	V2 D&B Delinquency Terms = False	Before Record Load	Selected All	Selected 37 of 39	V2 D&B Delinquency Score Range Is Empty						✓
workflowaction439	Set Field Mandatory	V2 D&B Delinquency Score Range = True	Before Record Load	Selected All	Selected 37 of 39	Title = Credit Review						✓
workflowaction440	Set Field Mandatory	V2 D&B Delinquency Score Range = False	Before Record Load	Selected All	Selected 37 of 39	Title Is Empty						✓
workflowaction441	Set Field Display Type	V2 D&B Delinquency Terms = HIDDEN	After Field Edit	Selected All	Selected 37 of 39	V2 D&B Delinquency Score Range Is Empty						✓
workflowaction446	Set Field Display Type	V2 D&B Delinquency Terms = NORMAL	After Field Edit	Selected All	Selected 37 of 39	V2 D&B Delinquency Score Range Is Not Empty						✓
workflowaction443	Set Field Mandatory	V2 D&B Delinquency Terms = True	After Field Edit	Selected All	Selected 37 of 39	V2 D&B Delinquency Score Range Is Not Empty						✓
workflowaction447	Set Field Mandatory	V2 D&B Delinquency Terms = False	After Field Edit	Selected All	Selected 37 of 39	V2 D&B Delinquency Score Range Is Empty						✓
workflowaction444	Set Field Mandatory	V2 D&B Delinquency Score Range = True	After Field Edit	Selected All	Selected 37 of 39	Title = Credit Review						✓
workflowaction445	Set Field Mandatory	V2 D&B Delinquency Score Range = False	After Field Edit	Selected All	Selected 37 of 39	Title Is Empty						✓

Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

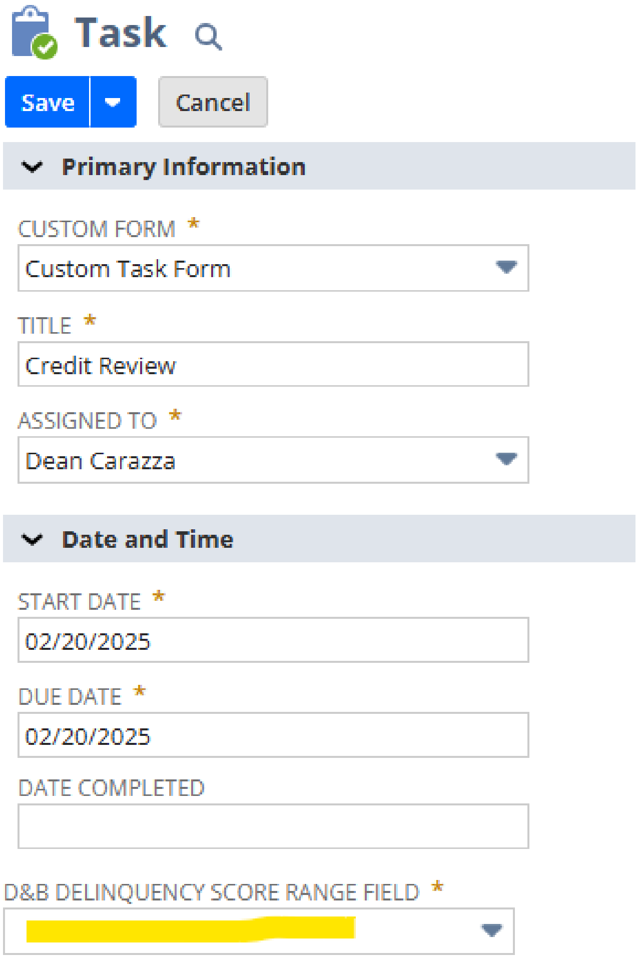
7. We can now test our workflow. To test make sure to put in View mode first.
   - Use Cases to test
     - If Task Title = Credit Review then the D&B Delinquency Field becomes mandatory

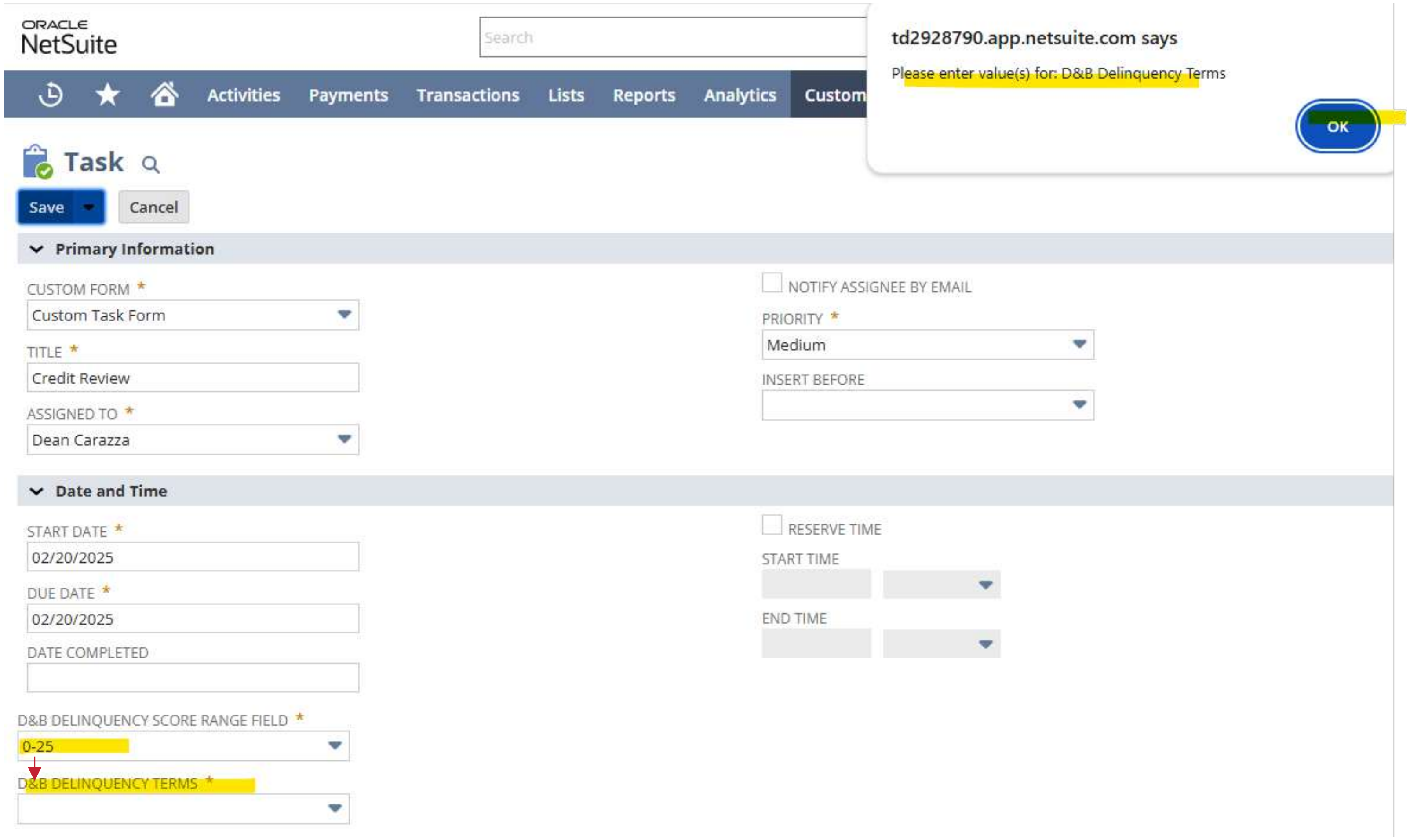




Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

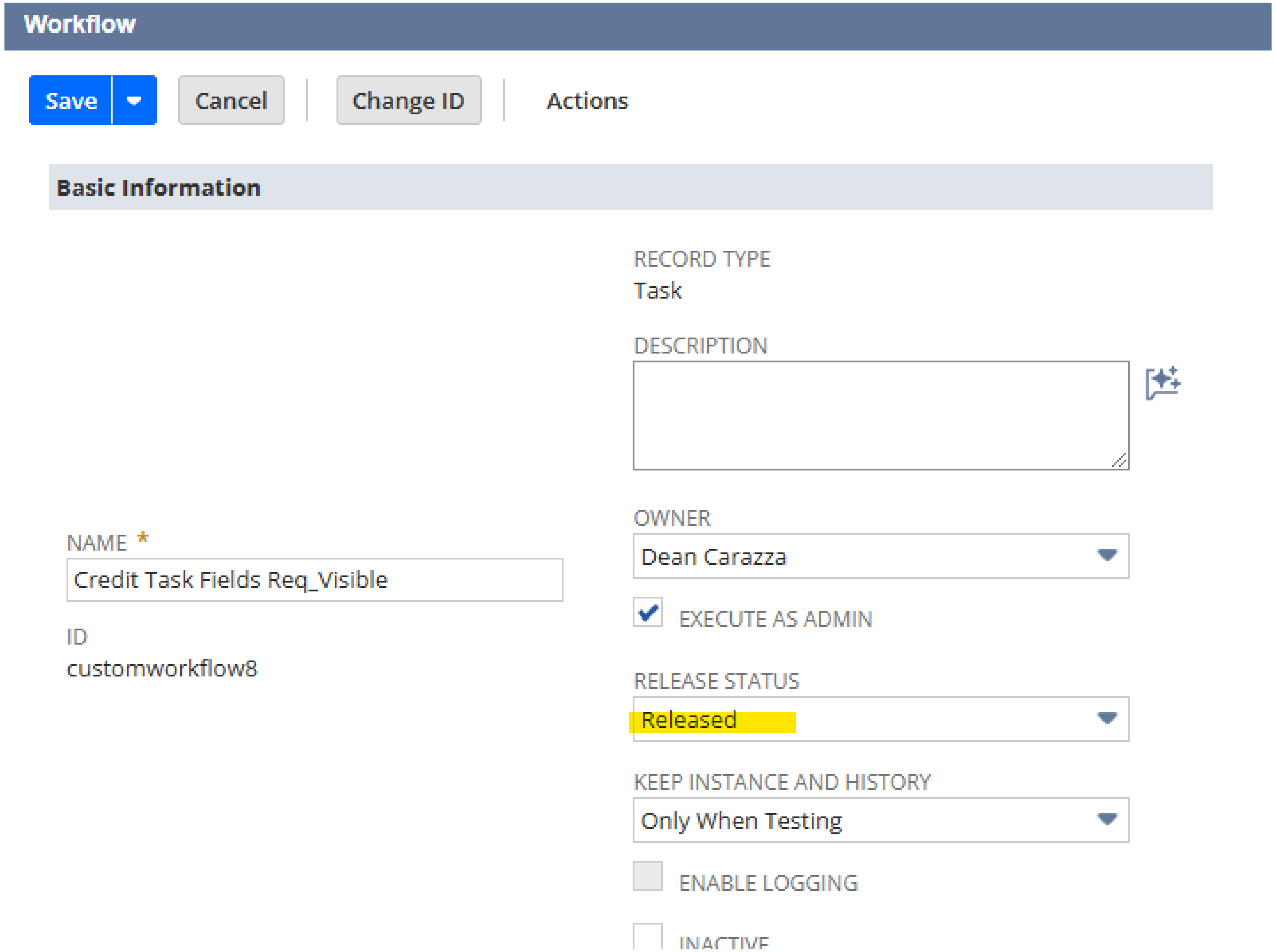
7. We can now test our workflow. To test make sure to put in View mode first.
   - Use Cases to test
     - If D&B Delinquency Score Range Field is not empty that will show the D&B Delinquency Terms Field and also be mandatory





Create a Dynamic Task Form with Dependent Dropdowns and Required Fields

8. If you have tested your workflow and confirm is working you can release your workflow



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 03/21/25 12–1PM PST
  - Target Agenda:
  - Creating a Custom Transaction

- 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

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NetSuite Consulting, Implementation and Outsourced Accounting Services

THANK YOU!

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