



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

February 21, 2025

Confidentiality Notice

The information in this document is confidential and proprietary to ScaleNorth, Inc.

This document must not be disclosed to any third party without prior written consent from ScaleNorth, Inc.

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 $\geq 90\%$ 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



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



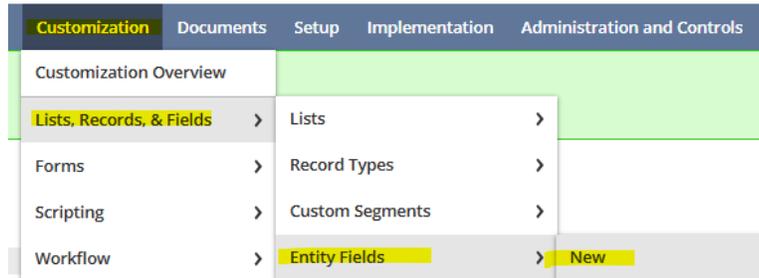
Automating a Credit Review Task for Customers $\geq 90\%$ of their Credit Limit

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



Custom Entity Field

Save Cancel Apply to Forms

LABEL *
Date Credit Review Task Created

ID
[Empty]

OWNER
Dean Carazza

DESCRIPTION
[Empty]

TYPE
Date

LIST/RECORD
[Empty]

STORE VALUE USE ENCRYPTED FORMAT
 SHOW IN LIST

Applies To Display Validation & Defaulting S

INSERT BEFORE
[Empty]

SUBTAB
Financial

DISPLAY TYPE
Normal

Applies To Display Validation & Defaulting Sourcing & Filtering Access Translation

CUSTOMER CONTACT

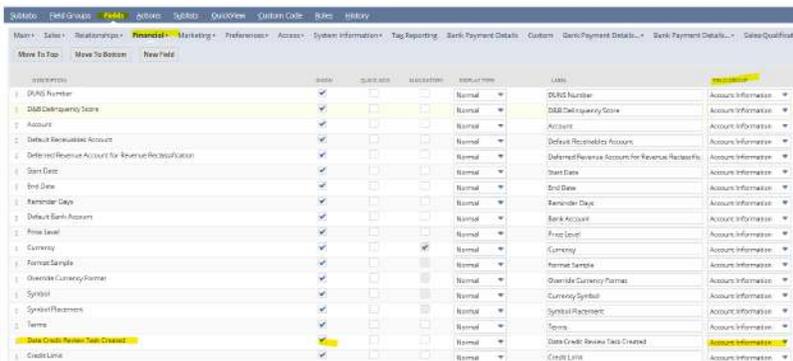
Create a Saved Search

- 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



The screenshot shows the NetSuite interface for editing a customer record. The top navigation bar includes 'Customer' and 'Customize' options. The main area displays 'Primary Information' with fields for CUSTOMER ID (151 zero credit limit new customer), SUBSIDIARY (US West), SALES REP (Dean Carazza), and TYPE. A 'Customize Form' button is visible in the top right corner.

- 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



The screenshot shows the 'Fields' subtab in NetSuite. A table lists various fields with columns for 'Field Name', 'Status', 'Account Information', and 'List'. The field 'Date Credit Review Task Created' is highlighted in yellow, indicating it has been selected for customization.

Customer Record:

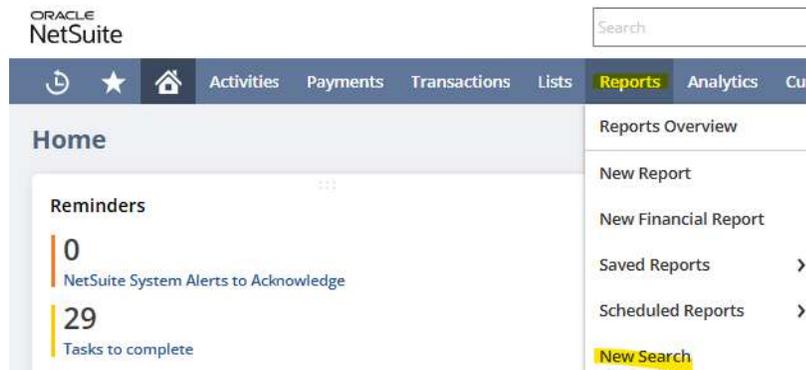


The screenshot shows the 'Account Information' subtab in NetSuite. The table displays various account information fields, including 'DUNS NUMBER', 'D&B DELINQUENCY SCORE', 'ACCOUNT', 'DEFAULT RECEIVABLES ACCOUNT', 'DEFERRED REVENUE ACCOUNT FOR REVENUE RECLASSIFICATION', and 'START DATE'. The field 'DATE CREDIT REVIEW TASK CREATED' is highlighted in yellow, indicating it has been added to the form.

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 $\geq 90\%$ 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

Search

SEARCH TYPE

Contact

Country

Customer

Customer-Subsidiary Relationship

Create a Saved Search

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

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)	

Saved Customer Search

Save & Run | Cancel | Preview | Actions

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

ID

PUBLIC
 AVAILABLE AS LIST VIEW

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

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)	

Add | Cancel | Insert | Remove

Save & Run | Cancel | Preview | Actions

Saved Customer Search

Set | Cancel

FUNCTION

FIELD

FORMULA *
{balance}/{creditlimit}

FORMULA (NUMERIC)
greater than or equal to

VALUE
0.90

Create a Saved Search

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

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)	

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

ID

PUBLIC
 AVAILABLE AS LIST VIEW

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

Use this tab to 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)	

Saved Customer Search

DATE CREDIT REVIEW TASK CREATED

on or before

Quick Filters

Day Week Month

Quarter Year

Favorites

Available Selectors

(Custom)

(Relative)

All

end of fiscal half before last

end of fiscal quarter before last

end of fiscal year before last

end of last business week

end of last fiscal half

end of last fiscal half one fiscal year ago

Saved Customer Search

DATE CREDIT REVIEW TASK CREATED

on or before (Relative)

1 weeks ago

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

- Now we can save > Run our search to see what initial results look like
 - Looks like 12 Customers that are $\geq 90\%$ 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 $\geq 90\%$ of their credit limit.

SN Customers $\geq 90\%$ 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%	

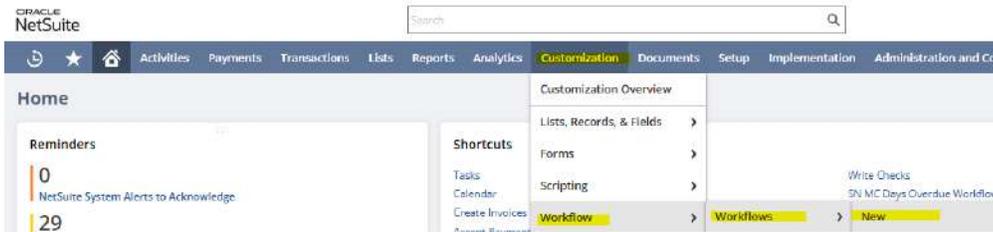
Create Scheduled Workflow



Create a Scheduled Workflow with Saved Search Condition

1. Create a Workflow

- Navigate to Customization>Workflow>Workflows>New



The screenshot shows the 'New Workflow' form in Oracle NetSuite. The form is titled 'New Workflow' and has a 'From Template' section. The 'Basic Information' section includes:

- RECORD TYPE: Customer
- SUB-TYPES: Customer, Lead, Prospect
- NAME: Create Credit Review Task
- ID: sn_create_credit_task
- DESCRIPTION: (empty)
- OWNER: Dean Carazza
- EXECUTE AS ADMIN:
- RELEASE STATUS: Testing
- KEEP INSTANCE AND HISTORY: Only When Testing
- ENABLE LOGGING:
- INACTIVE:

The 'Initiation' section is set to 'SCHEDULED'.

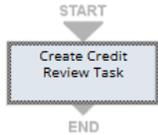
The 'Schedule' section includes:

- SAVED SEARCH FILTER: SN:Customers >=50% of the Credit Limit
- REPEAT:
- FREQUENCY: Every 30 minutes
- SCHEDULED FROM DATE: 10/22/2025

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

Workflow State

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

WORKFLOW
Create Credit Review Task

NAME *

ID
workflowstate129

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

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

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

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 * 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

The screenshot displays the Salesforce Workflow Builder interface. At the top, the workflow is named "Create Credit Review Task" with ID "workflowstate129". Below this, the "Actions" tab is active, showing a table with one action: "workflowaction405 Create Record Task" with trigger "Entry".

The "New Action" configuration panel is open, showing a list of action types on the left. The "Parameters" section is expanded, showing the field "Date Credit Review Task Created" selected. The "Value" section is configured as follows:

- DATE
- today
- FROM FIELD
- RECORD (JOIN FIELD): Current Record
- FIELD: (empty)
- FORMULA

At the bottom, there are "Save" and "Cancel" buttons.

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.

Workflow

Save | Cancel | Change ID | Execute now | Actions

Basic Information

RECORD TYPE
Customer

SUB TYPES *

- Customer
- Lead
- Prospect

NAME *
Create Credit Review Task

ID
customworkflow_sn_create_credit_task

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Testing

Workflow

Save | Cancel | Change ID | Execute now | Actions

Basic Information

RECORD TYPE
Customer

SUB TYPES *

- Customer
- Lead
- Prospect

NAME *
Create Credit Review Task

ID
customworkflow_sn_create_credit_task

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Testing

KEEP INSTANCE AND HISTORY
Only When Testing

ENABLE LOGGING

INACTIVE

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

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

[Return To Criteria](#)

[Edit this Search](#)

FILTERS

STYLE

Normal



NO RESULTS FOUND

No Search Results Match Your Criteria.

- 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

Tasks

[List](#) [Search](#) [Audit Trail](#) [Calendar](#)

VIEW: SN Sales Task Basic

[Edit View](#)

[New Task](#)

FILTERS

ASSIGNED TO

- All -

PRIORITY

- All -

STATUS

Not Completed

STYLE

Normal

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 V5 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

Workflow

Save | Cancel | Change ID | Execute now | Actions

Basic Information

RECORD TYPE
Customer

SUB TYPES *

- Customer
- Lead
- Prospect

NAME *
Create Credit Review Task

ID
customworkflow_sn_create_credit_task

DESCRIPTION

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Released

KEEP INSTANCE AND HISTORY
Only When Testing

ENABLE LOGGING

INACTIVE

Initiation

Create Dynamic Task Form with Dependent Dropdowns and Required Fields

A background image of a modern meeting room with a brick wall and large windows. Several people are seated around a table, and one person is standing and presenting. The image is overlaid with a dark teal color.

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.

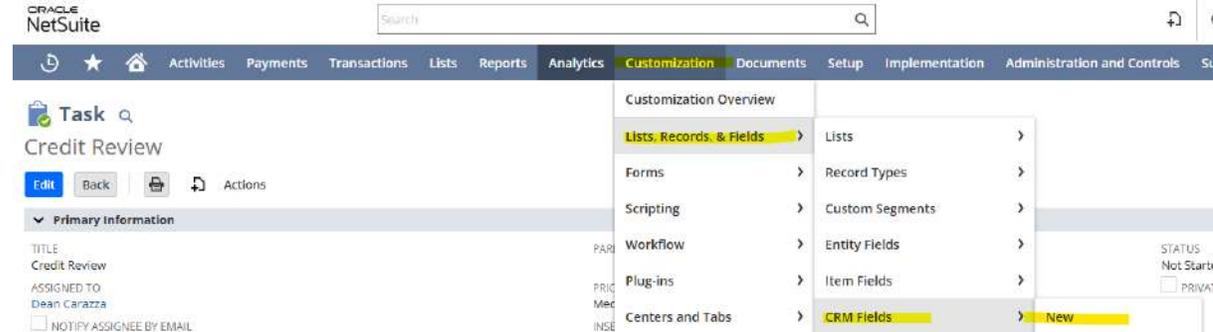
Understand your Business Scores & Ratings, so you can Plan for your Business's Future

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



Custom CRM Field

Save **Cancel** **Apply to Forms**

LABEL *
D&B Delinquency Score Range Field

ID

OWNER
Dean Carazza

DESCRIPTION

Applies To **Display** **Validation & Defaulting** **Sourcing & Filtering** **Access** **Translation**

TASK

TYPE
List/Record

LIST/RECORD

- New -
- ***Set Pref Form Category List
- ***Transaction Preferred Form
- **Item Backup Manager
- **Item Update Manager
- **Standard Item Fields List

EVENT

Custom List

Save **Cancel**

NAME *
D&B Delinquency Score Range

DESCRIPTION

ID

OWNER
Dean Carazza

SHOW OPTIONS IN: THE ORDER ENTERED
 ALPHABETICAL ORDER
 INACTIVE

Values		Translation		
ID	VALUE *	TRANSLATION	INTERNAL ID	INACTIVE
	0-25			
	26-50			
	51-75			
	76-100			

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

Custom CRM Field

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

LABEL *
D&B Delinquency Score Range Field

ID
custevent3

INTERNAL ID
3806

OWNER
Dean Carazza

DESCRIPTION

TYPE
List/Record

LIST/RECORD
D&B Delinquency Score Range

STORE VALUE USE ENCRYPTED FORMAT

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

INSERT BEFORE
- Unchanged -

SUBTAB
Main

DISPLAY TYPE
Normal

HELP

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

Task

Save | Cancel

Primary Information

CUSTOM FORM *
Custom Task Form

TITLE *

ASSIGNED TO *
Dean Carazza

Date and Time

START DATE *
02/20/2025

DUE DATE *
02/20/2025

DATE COMPLETED

D&B DELINQUENCY SCORE RANGE FIELD

- New -

0-25

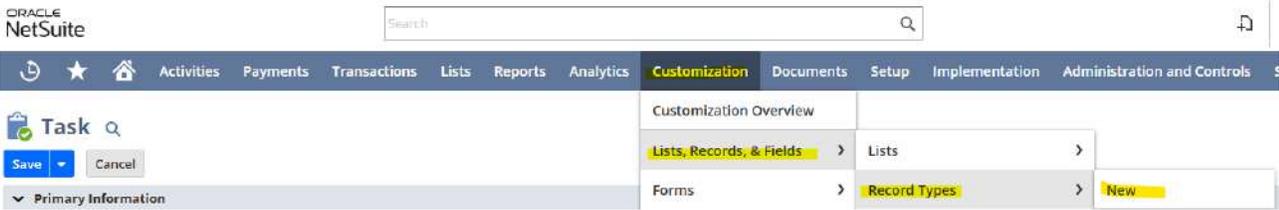
26-50

51-75

76-100

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



Custom Record Type

Save Cancel

NAME *
D&B Delinquency Score Terms

ID

ORIGINATING CUSTOM SEGMENT

OWNER
Dean Carazza

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
Require Custom Rec... Entries Permission

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

More

Subtabs Sublists Icon Numbering Permissions Links Managers Translation

ID	TITLE *	TRANSLATION	PARENT

Add Cancel Insert Remove Move Up Move Down Move To Top Move To Bottom

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

The screenshot shows the configuration page for a custom record type named "D&B Delinquency Score Terms". The page includes a header with "Save", "Cancel", "Change ID", and "Actions" buttons. Below the header, there are several sections: "NAME" with a text input field containing "D&B Delinquency Score Terms"; "ID" with fields for "customrecord1035", "INTERNAL ID" "1035", and "ORIGINATING CUSTOM SEGMENT"; "OWNER" with a dropdown menu showing "Dean Carazza"; "DESCRIPTION" with a text area; and a "SHOW INACTIVES" checkbox. There are also checkboxes for "INCLUDE NAME FIELD" and "SHOW ID". At the bottom, there are tabs for "Fields", "Subtabs", "Sublists", "Icon", and "Numbering", and buttons for "New Field", "Move To Top", and "Move To Bottom".

- Create a New Field

This screenshot shows the "Fields" tab in the configuration interface. It features a header with "Fields", "Subtabs", "Sublists", "Icon", and "Numbering" tabs. Below the header, there is a "SHOW INACTIVES" checkbox and a "New Field" button highlighted in yellow. To the right of the "New Field" button are "Move To Top" and "Move To Bottom" buttons.

The screenshot shows the configuration page for a specific field named "D&B Delinquency Score Terms Field". The page includes a header with "Save", "Cancel", "Change ID", "Apply to Forms", and "Actions" buttons. Below the header, there are several sections: "LABEL" with a text input field containing "D&B Delinquency Score Range"; "ID" with fields for "custrecord179", "INTERNAL ID" "3807", and "OWNER" "Dean Carazza"; "DESCRIPTION" with a text area; "TYPE" with a dropdown menu showing "Multiple Select"; "LIST/RECORD" with a dropdown menu showing "D&B Delinquency Score Range"; and checkboxes for "STORE VALUE" and "USE ENCRYPTED FORMAT". At the bottom, there are tabs for "Display", "Validation & Defaulting", "Sourcing & Filtering", "Access", "Translation", and "History". Below the "Display" tab, there are dropdown menus for "INSERT BEFORE" (set to "- Unchanged -"), "SUBTAB", and "DISPLAY TYPE" (set to "Normal"). There is also a "HELP" text area and a "ALLOW QUICK ADD" checkbox.

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

The screenshot shows the configuration page for a custom record type. The title is "Custom Record Type" and the record name is "D&B Delinquency Score Terms". There are buttons for "Save", "Cancel", "Change ID", and "Actions". The "NAME" field contains "D&B Delinquency Score Terms". The "ACCESS TYPE" dropdown is set to "Require Custom Rec...Entries Permission". On the right, there are checkboxes for "ALLOW QUICK ADD" and "ENABLE SYSTEM NOTES", both of which are checked. A "More" button is visible in the top right corner, and a "View Records" button is highlighted in the bottom right corner.

- 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

The screenshot shows the "D&B Delinquency Score Terms List" page. The title is "D&B Delinquency Score Terms List". There are buttons for "VIEW", "Custom Default", "Edit View", and "New D&B Delinquency Score Terms". The "D&B Delinquency Score Terms" section shows "Prepaid" as the selected term. There are buttons for "Save", "Cancel", "change ID", and "Actions". The "NAME" field contains "Prepaid". There is an "INACTIVE" checkbox which is unchecked. The "SCRIPT ID" is "va_L_330500_td2928790_659".

The screenshot shows the "D&B DELINQUENCY SCORE RANGE" dropdown menu. The options are:

D&B DELINQUENCY SCORE RANGE
0-25
26-50
51-75
76-100

The "SCRIPT ID" is "va_L_330500_td2928790_659".

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
 - Finish adding the remaining Records to complete the mapping above

D&B Delinquency Score Terms

Due on Receipt

Save | Cancel | Change ID | Actions

NAME *
Due on Receipt
 INACTIVE

D&B DELINQUENCY SCORE RANGE

- 0-25
- 26-50
- 51-75
- 76-100

SCRIPT ID
val_330502_td2928790_435

D&B Delinquency Score Terms

Save | Cancel

NAME *
Net 15
 INACTIVE

D&B DELINQUENCY SCORE RANGE

- 0-25
- 26-50
- 51-75
- 76-100

SCRIPT ID

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
 - Finish adding the remaining Records to complete the mapping above

D&B Delinquency Score Terms

Net 20

Save Cancel Change ID Actions

NAME *
Net 20

INACTIVE

D&B DELINQUENCY SCORE RANGE

- 0-25
- 26-50
- 51-75
- 76-100

SCRIPT ID
val_330504_td2928790_730

D&B Delinquency Score Terms

Save Cancel

NAME *
Net 30

INACTIVE

D&B DELINQUENCY SCORE RANGE

- 0-25
- 26-50
- 51-75
- 76-100

SCRIPT ID

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

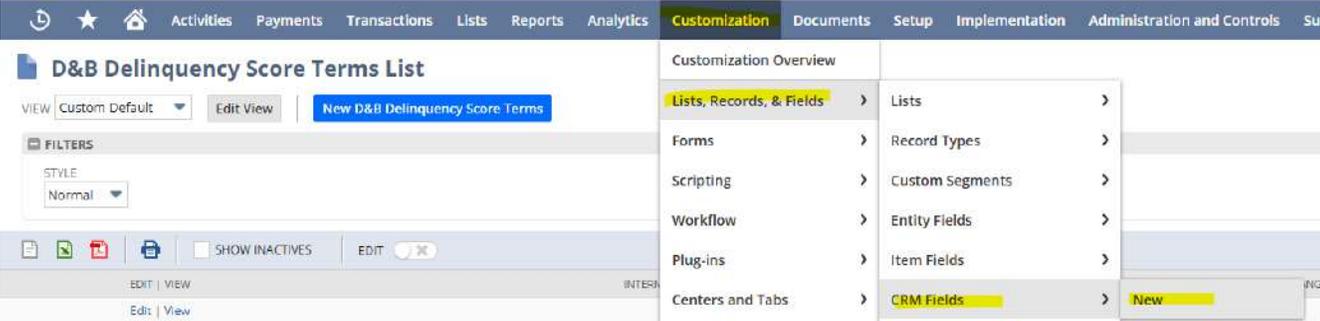
EDIT

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



Custom CRM Field

Save & Apply to Forms | Cancel | Apply to Forms

LABEL *
D&B Delinquency Terms

ID
[Empty]

OWNER
Dean Carazza

DESCRIPTION
[Empty]

TYPE
List/Record

LIST/RECORD
D&B Delinquency Score Terms

STORE VALUE USE ENCRYPTED FORMAT

SHOW IN LIST

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

TASK EVENT

Applies To: Display | Validation & Defaulting | Sour

INSERT BEFORE
[Empty]

SUBTAB
Main

DISPLAY TYPE
Normal

- 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

The screenshot shows the 'Custom CRM Field' configuration page for the field 'D&B Delinquency Terms'. The page includes a top navigation bar with tabs: Applies To, Display, Validation & Defaulting, Sourcing & Filtering (selected), Access, Translation, and History. The 'Sourcing & Filtering' subtab is active, showing configuration options for sourcing and filtering. The 'SOURCE LIST' is set to 'D&B Delinquency Score Range'. The 'SOURCE FROM' is set to '<type then tab>'. The 'SOURCE FILTER BY' is set to 'D&B Delinquency Score Range Field'. A table below shows the filter configuration:

FILTER USING	IS CHECKED	COMPARE TYPE	COMPARE VALUE TO	VALUE IS	IS NOT EMPTY	IS EMPTY	COMPARE TO FIELD
D&B Delinquency Score Range	<input checked="" type="checkbox"/>	equal					D&B Delinquency Score Range Field

Buttons at the bottom include 'Add', 'Cancel', 'Insert', and 'Remove'.

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 Range in dropdown, it limits the available dropdowns in the D&B Delinquency Terms Field

This screenshot shows a task form with the following fields and values:

- Primary Information:**
 - CUSTOM FORM: Custom Task Form
 - TITLE: (empty)
 - ASSIGNED TO: Dean Carazza
 - PRIORITY: Medium
 - INSERT BEFORE: (empty)
- Date and Time:**
 - START DATE: 02/20/2025
 - DUE DATE: 02/20/2025
 - DATE COMPLETED: (empty)
 - RESERVE TIME: (checkbox unchecked)
 - START TIME: (empty)
 - END TIME: (empty)
- Dependent Fields:**
 - D&B DELINQUENCY SCORE RANGE FIELD: 0-25
 - D&B DELINQUENCY TERMS: (dropdown menu open showing options: - New -, Prepaid)

This screenshot shows the task form with the 'D&B DELINQUENCY SCORE RANGE FIELD' updated to '26-50'. The 'D&B DELINQUENCY TERMS' dropdown menu is open, showing a filtered list of options: - New -, Due on Receipt, and Prepaid.

This screenshot shows the task form with the 'D&B DELINQUENCY SCORE RANGE FIELD' updated to '76-100'. The 'D&B DELINQUENCY TERMS' dropdown menu is open, showing a filtered list of options: - New -, Due on Receipt, Net 15, Net 20, Net 30, and Prepaid.

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.

Workflow

Save | Cancel | Change ID | Actions

Basic Information

RECORD TYPE
Task

DESCRIPTION

NAME *
Credit Task Fields Req_Visible

ID
customworkflow8

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

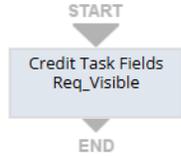
ON CREATE

ON VIEW OR UPDATE

USE VISUAL BUILDER | CUSTOM FORMULA

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 Revies Task
 - Below is 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

- 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 Task
 - 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

Task [Search Icon]

Save [Dropdown Arrow] Cancel

▼ **Primary Information**

CUSTOM FORM *
Custom Task Form [Dropdown Arrow]

TITLE *
[Yellow Highlighted Field]

ASSIGNED TO *
Dean Carazza [Dropdown Arrow]

▼ **Date and Time**

START DATE *
02/20/2025

DUE DATE *
02/20/2025

DATE COMPLETED
[Empty Field]

D&B DELINQUENCY SCORE RANGE FIELD
[Yellow Highlighted Field]

Task [Search Icon]

Save [Dropdown Arrow] Cancel

▼ **Primary Information**

CUSTOM FORM *
Custom Task Form [Dropdown Arrow]

TITLE *
Credit Review [Yellow Highlighted Field]

ASSIGNED TO *
Dean Carazza [Dropdown Arrow]

▼ **Date and Time**

START DATE *
02/20/2025

DUE DATE *
02/20/2025

DATE COMPLETED
[Empty Field]

D&B DELINQUENCY SCORE RANGE FIELD *
[Yellow Highlighted Field]

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

Task

Save

Primary Information

CUSTOM FORM *
Custom Task Form

TITLE *
Credit Review

ASSIGNED TO *
Dean Carazza

Date and Time

START DATE *
02/20/2025

DUE DATE *
02/20/2025

DATE COMPLETED

D&B DELINQUENCY SCORE RANGE FIELD *
0-25

ORACLE NetSuite

Activities Payments Transactions Lists Reports Analytics Custom

Task

Save

Primary Information

CUSTOM FORM *
Custom Task Form

TITLE *
Credit Review

ASSIGNED TO *
Dean Carazza

NOTIFY ASSIGNEE BY EMAIL

PRIORITY *
Medium

INSERT BEFORE

RESERVE TIME

START TIME

END TIME

D&B DELINQUENCY SCORE RANGE FIELD *
0-25

D&B DELINQUENCY TERMS *

td2928790.app.netsuite.com says
Please enter value(s) for: D&B Delinquency Terms

OK

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

Workflow

Save  Cancel | Change ID | Actions

Basic Information

NAME *
Credit Task Fields Req_Visible

ID
customworkflow8

RECORD TYPE
Task

DESCRIPTION


OWNER
Dean Carazza 

EXECUTE AS ADMIN

RELEASE STATUS
Released 

KEEP INSTANCE AND HISTORY
Only When Testing 

ENABLE LOGGING

INACTIVE

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>



NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

scalenorth.com

© 2024 ScaleNorth Inc. All rights reserved worldwide. This presentation is solely for the use of client personnel. No part of it may be circulated, quoted, or reproduced for distribution outside the client organization without prior written approval from ScaleNorth. This material was used by ScaleNorth during an oral presentation; it is not a complete record of the discussion.