



ScaleNorth NetSuite MasterClass – Session 9 – Automating Processes with Workflow Transformations

June 20, 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

- #1 – Transforming Approved Estimate into Sales Order
- #2 – Transforming a Lead into an Opportunity based on Qualified Criteria
- #3 – Transforming Sales Orders Pending Billing into Invoices

▲ Live Q&A

▲ Next Steps

Introductions



Charles Stevenson

Vice President, Sales

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



Dean Carazza, CPA

Sr. Business Development Manager

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- ▲ 14 years of experience
- ▲ Public and Private Accounting
- ▲ 8 years NetSuite Experience
 - 2 Years Private/User - Assistant Controller for \$100M Distributor in Irvine
 - 6 years ScaleNorth
 - Led some of the largest and most complex implementations and integrations. Have done over 20 implementations.
 - Industry experience
 - Manufacturing, E-Commerce and Warehouse/Distribution SaaS, Professional Services

Meet The Team

“

We wanted a partner that could deliver fast solutions, communicate with us and keep us up to date on the status of our ERP project...ScaleNorth covered all of these bases while delivering world-class service. It's been fantastic.

Jerod Schoneman
General Manager, Total Energy Systems



275+
Team
Members



1,650+
Years of Collective
NetSuite ERP
Experience

ORACLE NETSUITE
BPO Partner



680+
NetSuite
Certifications
Held by Staff



8.5+
Avg Years of
NetSuite
Experience

ORACLE NETSUITE
Solution Provider



\$2.5B+
Annual Revenue
Transactions
Processed



57%
Percentage
of staff with
CPAs

ORACLE NETSUITE
SuiteCloud Developer Network

Services at a Glance



NetSuite
Implementation



Outsourced
Accounting



NetSuite
Consulting &
Managed Services

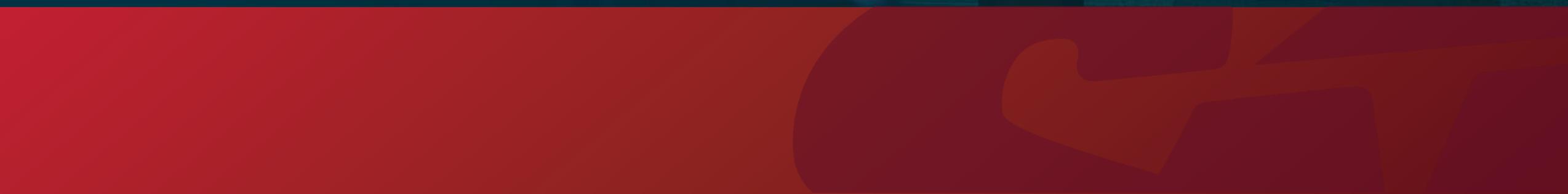


Technical
Services

Technology Partners



#1 Transforming Approved Estimate into a Sales Order



#1 Transforming Approved Estimate into Sales Order

- ▲ Create a Workflow that puts approval button on Estimates and when Approval Button is clicked will automatically turn that approved estimate into a Sales Order
 - Start by creating a workflow
 - Navigate to Customization>Workflow>Workflows>New
 - Name the workflow – SN MC 1 Transform Approved Est>SO – Fill out like screen shot below and save

The screenshot shows the 'New Workflow' configuration screen in SAP. The 'Basic Information' section is expanded, showing the following fields and values:

- RECORD TYPE ***: Transaction
- SUB TYPES ***: Deposit Application, Estimate (selected), Expense Report, Intercompany Journal Entry
- NAME ***: SN MC 1 Transform Approved Est>SO
- ID**: (empty)
- DESCRIPTION**: (empty)
- OWNER**: Dean Carazza
- EXECUTE AS ADMIN
- RELEASE STATUS**: Testing
- KEEP INSTANCE AND HISTORY**: Only When Testing
- ENABLE LOGGING
- INACTIVE

The 'Initiation' section shows 'EVENT BASED' selected over 'SCHEDULED'.

The 'Event Definition' section shows 'ON CREATE' and 'ON VIEW OR UPDATE' selected. The 'USE' section shows 'VISUAL BUILDER' selected over 'CUSTOM FORMULA'.

#1 Transforming Approved Estimate into Sales Order-Continued

▲ Next we need to add our first state and action

- Will add a State and action to add an approval button to an estimate when Estimate Status <> Processed
- Double click into the state 1 box while workflow is in Edit Mode

 **Workflow:** SN MC 1 Transform Approved Est>SO



- Name the State – Add Approval Button and Save

Workflow State

Save | **Cancel** | **Change ID** | **Actions**

WORKFLOW
SN MC 1 Transform Approved Est>SO

DESCRIPTION

NAME *
Add Approval Button

ID
workflowstate154

DO NOT EXIT WORKFLOW
 START STATE

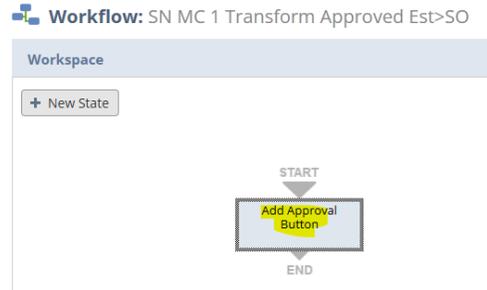
Actions | Transitions | Fields | Translation

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

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CON
No records to show.								

#1 Transforming Approved Estimate into Sales Order-Continued

- ▲ Next we can add our action to add a button based on condition
 - Double click back into the State now that have renamed to Add Approval Button



- Click on New Action Button

The screenshot shows the 'Workflow State' configuration panel. It has a title bar 'Workflow State' and buttons for 'Save', 'Cancel', 'Change ID', and 'Actions'. Below the buttons, it displays the workflow name 'SN MC 1 Transform Approved Est>SO' and a 'NAME *' field containing 'Add Approval Button'. The 'ID' field contains 'workflowstate154'. At the bottom, there is an 'Actions' tab with buttons for 'Move To Top', 'Move To Bottom', and 'New Action'. Below the buttons is a table with columns 'ID', 'NAME', 'PARAMETERS', and 'TRIGGER', and a message 'No records to show.'

#1 Transforming Approved Estimate into Sales Order-Continued

▲ Select the Add Button Action

New Action

TYPE

3Way Check Subs Match Field WS (Custom)

Add Button

Celigo Realtime Export (Custom)

Confirm

- Label the Button – Approve Estimate and add Condition Status <> Estimate: Processed

Parameters

LABEL *

Approve Estimate

Workflow Action

Save Cancel

Basic Information

WORKFLOW
SN MC 1 Transform Approved Est>SO

STATE
Add Approval Button

TYPE
Add Button

ID

INSERT BEFORE

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

SAVED SEARCH CONDITION

Workflow Condition

Save Cancel

USE EXPRESSIONS

RECORD	FIELD *	COMPARE T
	Status	none of

Add Cancel Insert

Save Cancel

Choose Selection

Deprecated Custom Transaction:Status X - Invoice

Type & tab... Search

Click Selection to Add

- Deprecated Custom Transaction:Status X
- Deprecated Custom Transaction:Status Z
- Deprecated Custom Transaction:Undefined
- Deprecated Custom Transaction:Voided
- Estimate:Closed
- Estimate:Expired
- Estimate:Open
- **Estimate:Processed**
- Estimate:Undefined
- Estimate:Voided
- Expense Report:Approved (Overriden)

Current Selections

- ✗ Estimate:Processed

Done Cancel

Workflow Condition

Save Cancel

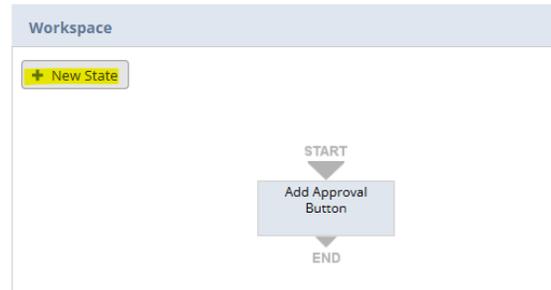
USE EXPRESSIONS

RECORD	FIELD *	COMPARE TYPE	VALUE	SELECTION
	Status	none of		Estimate:Processed

#1 Transforming Approved Estimate into Sales Order-Continued

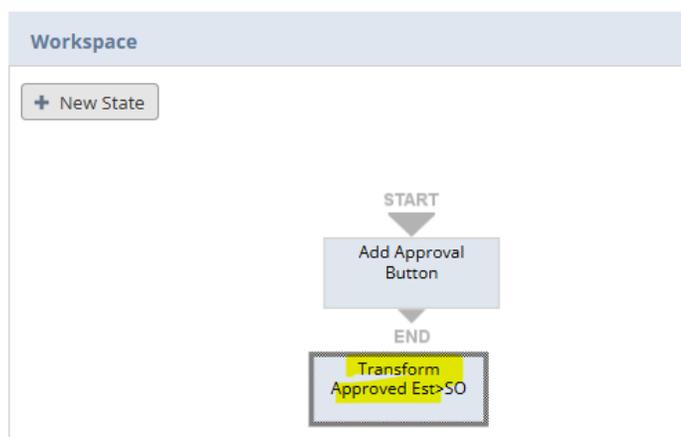
- ▲ Now that we have successfully added our button to estimates we can proceed with adding our next state where we will perform our transform action to turn approved estimate into a Sales Order
 - Put the workflow back into Edit Mode
 - Click New State

Workflow: SN MC 1 Transform Approved Est>SO



- Name this State Transform Approved Est> SO and Save. Position under neat the Add Approval Button State.

Workflow: SN MC 1 Transform Approved Est>SO



#1 Transforming Approved Estimate into Sales Order-Continued

- ▲ Now we need to add our transition arrow from Add Approval Button State to Transform Approved Est>SO State. To do this draw an arrow connecting these to states together like in picture below



- Next double click on the arrow added to configure the settings to transition on click of Approved Estimate Button and Save

Workflow Transition

Save Cancel Change ID Actions

Basic Information

WORKFLOW
SN MC 1 Transform Approved Est>SO

ID
workflowtransition301

FROM
Add Approval Button

TO *
Transform Approved Est>SO

INSERT BEFORE
- Unchanged -

TRANSITION ON

EVENT TYPES

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

SAVED SEARCH CONDITION

WAIT FOR WORKFLOW

WAIT FOR WORKFLOW STATE

EXECUTE ON BUTTON
Approve Estimate

#1 Transforming Approved Estimate into Sales Order-Continued

- ▲ Now that we have our transition connecting our states. We can add our action to the Transform Approved Est>SO State
 - Double click into the State and add a new Action>Transform Record

The image displays three screenshots from the SAP Workflow Designer interface, illustrating the steps to add a new action to a workflow state.

Workflow State Screenshot: Shows the 'Workflow State' configuration for 'SN MC 1 Transform Approved Est>SO'. The 'NAME' field is set to 'Transform Approved Est>SO'. The 'Actions' tab is active, showing a table with columns 'ID', 'NAME', 'PARAMETERS', and 'TRIGGER ON'. A 'New Action' button is highlighted in yellow.

New Action Screenshot: Shows the 'New Action' selection screen. A list of actions is displayed, with 'Transform Record' highlighted in yellow at the bottom.

Workflow Action Screenshot: Shows the 'Workflow Action' configuration for the 'Transform Record' action. The 'RECORD TYPE' is set to 'Sales Order'. The 'Parameters' section is expanded, showing the 'RECORD TYPE' dropdown menu.

Red arrows indicate the flow of the process: from the 'New Action' button in the 'Workflow State' screen to the 'New Action' selection screen, and then from the 'Transform Record' action to the 'Workflow Action' configuration screen.

#1 Transforming Approved Estimate into Sales Order-Continued

- ▲ Can see the Transform Action We added to the State and Save the Workflow State

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC 1 Transform Approved Est>SO

NAME *
Transform Approved Est>SO

ID
workflowstate155

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

Actions • Transitions Fields Translation •

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

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SE
workflowaction472	Transform Record	Sales Order	Entry	Selected All	Selected 37 of 39			

- ▲ Once saved we can test our workflow by putting into View Mode. Expectation is if we go back to our Estimate We Created and Hit Approve Button it should create a linked Sales Order and Status of Estimate should changed to processed.

Estimate 🔍

10 Dermack Services **OPEN**

Edit Back Sales Order Cash Sale Invoice **Approve Estimate** 🖨️ 🔍

Estimate 🔍

10 Dermack Services **PROCESSED**

Edit Back Sales Order Cash Sale Invoice 🖨️ 🔍

Items Shipping Billing Accounting Relationships Communication **Related Records** System

Transactions Expense Report **Orders & Sales** Support Cases

Print

DATE	TYPE	NUMBER
06/19/2025	Sales Order	464

#2 Transforming a Lead into an Opportunity Based on Qualified Criteria

A man in a suit is standing and presenting to a group of people seated around a table in a meeting room. The room has a brick wall and large windows. The scene is overlaid with a blue tint. The background image shows a man in a suit standing and presenting to a group of people seated around a table in a meeting room. The room has a brick wall and large windows. The scene is overlaid with a blue tint.

#2 Transforming Lead into an Opp Based on Qualified Criteria

- ▲ We want to make sure that once a Lead has been Qualified (Has Budget and We Know Who the Decision Maker is, We Transform the Lead into an Opportunity
 - To do this we first want to add two Entity Checkbox Fields for Has Budget and We Know Who the Decision Maker Is and we put these fields on the Sales Tab of the Lead Form.

The screenshot displays a CRM interface for a Lead record. At the top, there is a search bar with the text 'Lead' and a magnifying glass icon. Below this are 'Save' and 'Cancel' buttons. The form is organized into sections, with the 'Primary Information' section expanded. This section contains fields for 'CUSTOMER ID' (set to 'To Be Generated'), 'TYPE' (with radio buttons for 'COMPANY' and 'INDIVIDUAL', where 'INDIVIDUAL' is selected), 'COMPANY NAME', 'SUBSIDIARY' (a dropdown menu), 'STATUS' (a dropdown menu set to 'LEAD-Unqualified'), and 'NAME' (three input fields). Below the Primary Information section is the 'Email | Phone | Address' section, which includes fields for 'PHONE', 'INDUSTRY' (a dropdown menu), 'NO. OF EMPLOYEES', 'ANNUAL REVENUE', 'EMAIL', 'EMAIL ADDRESS FOR PAYMENT NOTIFICATION', 'TERMS DEP FIELD' (a dropdown menu), and 'SN BEST SELLING ITEM'. At the bottom of the form, a navigation bar shows several tabs: 'Communication', 'Sales' (which is highlighted in yellow), 'Relationships', 'Financial', 'Marketing', 'Address', 'Preferences', 'System Information', 'Bank Payment Details (Debit)', and 'Bank Payment Details (Credit)'. Below the navigation bar, two custom checkbox fields are highlighted in yellow: 'HAS BUDGET?' and 'KNOW WHO DECISION MAKER IS?'.

#2 Transforming Lead into an Opp Based on Qualified Criteria - Continued

- ▲ Once we have our two fields, we can proceed to creating our workflow
 - Navigate to Customization>Workflow>Workflows>New
 - Name the Workflow - SN MC 2 Transform Lead>Opp - Complete like screen shot below and Save

The screenshot displays the NetSuite Workflow Setup interface, divided into two main sections: 'Basic Information' and 'Workflow Condition'.

Basic Information:

- RECORD TYPE ***: Customer
- SUB TYPES ***: Lead (selected), Customer, Prospect
- NAME ***: SN MC 2 Transform Lead>Opp
- ID**: (empty)
- 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
- TRIGGER TYPE**: After Record Submit
- USE**: VISUAL BUILDER CUSTOM FORMULA
- CONDITION**: (empty)

Workflow Condition (Google Chrome window):

Workflow Condition

USE EXPRESSIONS

RECORD	FIELD *	COMPARE TYPE	VALUE	SELECTION	RECORD	VALUE FIELD
	Has Budget?	checked				
	Know who Decision Maker Is?	checked				
	Status	any of		Unqualified		

Buttons: Add, Cancel, Insert, Remove, Save, Cancel

#2 Transforming Lead into an Opp Based on Qualified Criteria - Continued

- ▲ Next we can edit state 1 to name it and add our Transform Action.
 - Double Click into State 1 and Name it Lead>Opp and Save

Workflow: SN MC 2 Transform Lead>Opp



Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC 2 Transform Lead>Opp

NAME *
Lead>Opp

ID
workflowstate156

Actions Transitions Fields Translation

Move To Top Move To Bottom New Action New Group

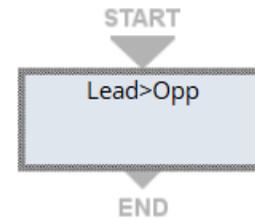
ID	NAME	PARAMETERS	TRIGGER ON	EVENT
No records to show.				

No records to show.

Workflow: SN MC 2 Transform Lead>Opp

Workspace

+ New State



#2 Transforming Lead into an Opp Based on Qualified Criteria - Continued

- ▲ Now that we have named our state we can double click back into to add our transform action. Double click in and hit the New Action Button

Workflow State

Save Cancel Change ID Actions

WORKFLOW
SN MC 2 Transform Lead>Opp

NAME *
Lead>Opp

ID
workflowstate156

Actions Transitions Fields Translation •

Move To Top Move To Bottom **New Action**

ID	NAME	PARAMETERS	TRIGG
No records to show			

New Action

- Create Record
- Go To Page
- Go To Record
- Initiate Workflow
- Lock Record
- NAW Check Feature Availability WS (Custom)
- NAW Create Exception Record WS (Custom)
- NAW Get User Preferences WS (Custom)
- NAW Show Exceptions WS (Custom)
- NAW delete Exception Record WS (Custom)
- Remove Button
- Return User Error
- Send Campaign Email
- Send Email
- Set Field Display Label
- Set Field Display Type
- Set Field Mandatory
- Set Field Value
- Show Message
- Subscribe To Record
- Transform Record**

Workflow Action

Save Cancel

Basic Information

WORKFLOW
SN MC 2 Transform Lead>Opp

STATE
Lead>Opp

TYPE
Transform Record

ID

INSERT BEFORE

TRIGGER ON
Entry

EVENT TYPES
Approve
Cancel
Copy

Selected All

CONTEXTS
Action

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

SAVED SEARCH CONDITION

Schedule

USE DELAY TIME OF DAY

DELAY

START TIME

RECURRENCE

UNIT

Parameters

RECORD TYPE *
Opportunity

STORE RESULT IN

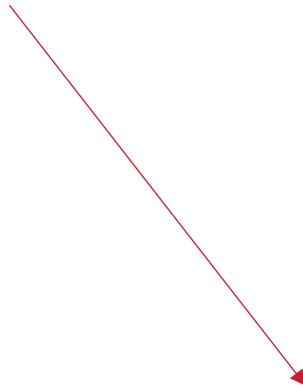
REDIRECT WITHOUT SAVING

FIELD	TEXT	CHECKED	DATE	SELECTION	JOIN	VALUE FIELD	FORMULA
Title					Join		{entityid} '-' {comments}
Sales Rep						Sales Rep	
Expected Close			end of next month				
Projected Total		25000.00					

Add Cancel Insert Remove

Save Cancel Make Copy Change ID Actions

- ▲ Add Transform Action



#2 Transforming Lead into an Opp Based on Qualified Criteria - Continued

- ▲ Now that we have added our Transform Action we can Save our Workflow State and Test our Workflow

The screenshot shows the 'Workflow State' configuration page in Salesforce. At the top, there are buttons for 'Save', 'Cancel', 'Change ID', and 'Actions'. The main configuration area includes:

- WORKFLOW:** SN MC 2 Transform Lead>Opp
- NAME:** Lead>Opp
- ID:** workflowstate156
- DESCRIPTION:** An empty text box.
- Options:** DO NOT EXIT WORKFLOW and START STATE.

Below the configuration area is the 'Actions' section, which includes a table of workflow actions:

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
workflowaion473	Transform Record	Opportunity	Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>

- ▲ Put Workflow into View Mode and Enter a Lead and check the Has Budget and Know Who Decision Maker Checkboxes and Save the Lead Record and expectation is that it will create an opportunity setting the fields we mapped in the transform action and change the Lead to a Prospect since there is now a qualified Opportunity for the Lead.

#2 Transforming Lead into an Opp Based on Qualified Criteria - Continued

Lead

[Save](#) [Cancel](#)

Primary Information

CUSTOMER ID
To Be Generated

TYPE
 COMPANY
 INDIVIDUAL

COMPANY NAME *

SUBSIDIARY *

STATUS *

SALES REP

LEAD SOURCE

FORM *

COMMENTS

LAST MODIFIED DATE

TRANSACTIONS NEED APPROVAL

Email | Phone | Address

PHONE

EMAIL

INDUSTRY

NO. OF EMPLOYEES

ANNUAL REVENUE

EMAIL ADDRESS FOR PAYMENT NOTIFICATION

TERMS DEP FIELD

SN BEST SELLING ITEM
 AUTOBILL CUSTOMER?

LAST SALES ACTIVITY

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

HAS BUDGET? KNOW WHO DECISION MAKER IS?

Prospect

154 Test Lead to Opp

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

Primary Information

CUSTOMER ID
154 Test Lead to Opp

TYPE
Company

COMPANY NAME
Test Lead to Opp

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

HAS BUDGET? KNOW WHO DECISION MAKER IS?

Transactions **Opportunities** Items Purchased Projects Qualification

VIEW *

STATUS *

[New Opportunity](#) [Customize View](#)

EDIT	SALES REP	DATE	TITLE	DOCUMENT NUMBER	CUSTOMER	OPPORTUNITY STATUS	EXPECTED CLOSE	PROJECTED TOTAL	PROBABILITY	FORECAST TYPE
Edit	Dean Carazza	06/19/2025	154 Test Lead to Opp - Managed Services	40	154 Test Lead to Opp	In Discussion	07/31/2025	25,000.00	20.0%	Omitted

#3 Transforming Sales Orders Pending Billing Into Invoices

A background image of a meeting room with a blue tint. Several people are seated around a long table, and one person is standing at the head of the table, possibly presenting. The room has a brick wall and large windows.

#3 Transforming Sales Orders Pending Billing Into Invoices

- ▲ We would like to automate the invoicing process for Sales Orders that are in a Pending Billing Status rather than make user go to Invoice Sales Orders Page Daily and Select Invoices and Submit.
 - To do so we will create a Scheduled Transaction>Sales Order Workflow that runs on a saved search result on schedule.
 - To start we want to create an Entity Checkbox field for Customers that we want Auto Billing Enabled for. We put this field on the main tab of the customer form

The screenshot displays a CRM form for a Customer. At the top, there is a search icon and the word "Customer". Below this are "Save" and "Cancel" buttons. The form is divided into two main sections: "Primary Information" and "Email | Phone | Address".

Primary Information Section:

- CUSTOMER ID:** To Be Generated
- TYPE:** Radio buttons for COMPANY (selected) and INDIVIDUAL.
- COMPANY NAME:** Text input field with a search icon.
- SUBSIDIARY:** Dropdown menu with "<Type then tab>" and a search icon.
- STATUS:** Dropdown menu with "CUSTOMER-Closed Won" and a search icon.
- REPRESENTS SUBSIDIARY:** Dropdown menu with "<Type then tab>" and a search icon.
- SALES REP:** Text input field with "Dean Carazza".
- LEAD SOURCE:** Text input field with "<Type then tab>".
- FORM:** Text input field with "SS SVCS PRIM - Customer".
- COMMENTS:** Text area.
- LAST MODIFIED DATE:** Text input field.
- TRANSACTIONS NEED APPROVAL:** Checkbox.

Email | Phone | Address Section:

- PHONE:** Text input field.
- INDUSTRY:** Dropdown menu with "<Type then tab>" and a search icon.
- NO. OF EMPLOYEES:** Text input field.
- ANNUAL REVENUE:** Text input field.
- EMAIL:** Text input field.
- EMAIL ADDRESS FOR PAYMENT NOTIFICATION:** Text input field.
- TERMS DEP FIELD:** Dropdown menu with "<Type then tab>" and a search icon.
- SN BEST SELLING ITEM:** Text input field.
- AUTOBILL CUSTOMER?:** Text input field with a yellow highlight.
- LAST SALES ACTIVITY:** Text input field.

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Once we have our Entity Field for Auto Bill created, next we can create our saved search that will be used for the scheduled workflow. Create a Transaction Search with the following Criteria and Results tabs
 - Criteria Tab

Saved Transaction Search

[Save & Run](#) [Cancel](#) [Preview](#) [Actions](#)

SEARCH TITLE *
SN MC 3 Auto Bill SO Pending Billing

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
FILTER *	DESCRIPTION *
Type	is Sales Order
Status	is Sales Order:Pending Billing
Main Line	is true
Customer (Main Line) : Autobill Customer? (Custom)	is true

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Once we have our Entity Field for Auto Bill created, next we can create our saved search that will be used for the scheduled workflow. Create a Transaction Search with the following Criteria and Results tabs
 - Results Tab

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
Name DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

OUTPUT TYPE
Normal

CONSOLIDATED EXCHANGE RATE
Per-Account

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
:: Order Type					
:: *					
:: Date					
:: As-Of Date					
:: Period					
:: Tax Period					
:: Type					
:: Document Number					
:: Name					Custom Label
:: Account					
:: Memo					
:: Amount					
:: Amount Unbilled					

#3 Transforming Sales Orders Pending Billing Into Invoices – Continued

- ▲ Save and Run the Search. There should be no results as have not checked the autobill checkbox on any customers yet. I checked the Auto Bill Checkbox on two customers that had Sales Orders in a Pending Bill Status and then refreshed the search results to see show up.
 - Customers
 - Copper Software SO 419 and 431
 - Demizz Consulting SO 423 and 435
 - Can See updated Search Results Below once checked Auto Bill for these customers – There is \$10,493.70 ready to be billed for these customers

SN MC 3 Auto Bill SO Pending Billing: Results List Search Audit Trail

[Edit this Search](#)

FILTERS

STYLE
Normal

NEW	EDIT VIEW	INTERNAL ID	ORDER TYPE	*	DATE	AS-OF DATE	PERIOD	TAX PERIOD	TYPE	DOCUMENT NUMBER	NAME *	ACCOUNT	MEMO	AMOUNT	AMOUNT UNBILLED
	Edit View	6407		*	05/01/2025		May 2025	May 2025	Sales Order	419	Copper Software Copper Software	9006 Sales Orders		854.85	50.85
	Edit View	6578		*	06/01/2025		Jun 2025	Jun 2025	Sales Order	431	Copper Software Copper Software	9006 Sales Orders		854.85	50.85
	Edit View	6411		*	05/14/2025		May 2025	May 2025	Sales Order	423	Demizz Consulting Demizz Consulting	9006 Sales Orders		6,516.00	5,196.00
	Edit View	6582		*	06/14/2025		Jun 2025	Jun 2025	Sales Order	435	Demizz Consulting Demizz Consulting	9006 Sales Orders		6,516.00	5,196.00
Total														14,741.70	10,493.70

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Now that we have our Saved Search Created, we can proceed to creating our workflow
 - Navigate to Customization>Workflow>Workflows>New
 - Name the workflow and complete like screen shot below

The screenshot displays the 'New Workflow' configuration screen. At the top, there are 'Save' and 'Cancel' buttons. The 'Basic Information' section includes:

- RECORD TYPE ***: Transaction
- SUB TYPES ***: Revenue Arrangement
 - Sales Order (highlighted)
 - Statistical Journal Entry
 - Transfer Order
 - Vendor Bill
- NAME ***: SN MC 3 Transform SO>Invoice
- ID**: (empty field)
- DESCRIPTION**: (empty text area)
- OWNER**: Dean Carazza
- EXECUTE AS ADMIN**
- RELEASE STATUS**: Testing
- KEEP INSTANCE AND HISTORY**: Only When Testing
- ENABLE LOGGING**
- INACTIVE**

The **Initiation** section shows:

- EVENT BASED**
- SCHEDULED**

The **Schedule** section includes:

- SAVED SEARCH FILTER ***: SN MC 3 Auto Bill SO Pending Billing
- REPEAT**
- FREQUENCY**: Every 30 minutes

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Next we can edit and double click into State 1 to rename State 1 to Transform SO Pending Billing>Invoice and Save

The screenshot shows a workflow editor interface. On the left, a workspace contains a flow starting with a 'START' node, followed by a state box labeled 'State 1', and ending with an 'END' node. A 'Workflow State' dialog box is open over the 'State 1' box. The dialog has tabs for 'Actions', 'Transitions', 'Fields', and 'Translation'. The 'NAME' field is highlighted and contains the text 'Transform SO Pending Billing>Invoice'. Other fields include 'ID' with the value 'workflowstate157'. Below the dialog, a table header is visible with columns: ID, NAME, PARAMETERS, TRIGGER ON, and EVENT T.

Workflow: SN MC 3 Transform SO>Invoice

The screenshot shows the same workflow editor workspace as above. The state box is now labeled 'Transform SO Pending Billing>Invoice' and is highlighted in yellow. The 'START' and 'END' nodes are still present in the flow.

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Now that we have renamed our State to Transform SO Pending Billing>Invoice, we can double click in to add our Transform Action like screen shots below

Workflow State configuration page. The 'NAME' field is set to 'Transform SO Pending Billing>Invoice'. The 'ID' field is 'workflowstate157'. The 'Actions' tab is selected, showing a table with no records to show.

New Action selection menu. The 'Transform Record' option at the bottom is highlighted in yellow. A red arrow points from this option to the 'Transform Record' configuration page.

Workflow Action configuration page. The 'STATE' is set to 'Transform SO Pending Billing>Invoice' and the 'TYPE' is 'Transform Record'. The 'TRIGGER ON' is set to 'Entry'. The 'EVENT TYPES' list includes 'Approve', 'Cancel', and 'Copy'. The 'CONTEXTS' list includes 'Action', 'Bank Connectivity', and 'Bank Statement Parser'. The 'RECORD TYPE' is set to 'Invoice'. The 'STORE RESULT IN' field is empty.

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Next we can see our Transform action that was added to the State and Save our workflow State

Workflow State

Save | **Cancel** | **Change ID** | **Actions**

WORKFLOW
SN MC 3 Transform SO>Invoice

NAME *
Transform SO Pending Billing>Invoice

ID
workflowstate157

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

Actions • **Transitions** **Fields** **Translation** •

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

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION	DELAY	RECURRENCE	UNIT	ACTIVE
:: workflowaction474	Transform Record Invoice		Entry	Selected All	Selected 37 of 39							<input checked="" type="checkbox"/>

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ We are now ready to test our Workflow. While in edit mode we can Execute Now so don't have to release the workflow and wait 30 minutes to see if works.

The screenshot displays the 'Workflow' configuration page. In the 'Basic Information' section, the 'Execute now' button is highlighted in yellow. The 'SUB TYPES' dropdown menu is open, showing options like 'Advanced Intercompany Journal Entry', 'Cash Refund', 'Cash Sale', and 'Check'. The 'NAME' field contains 'SN MC 3 Transform SO>Invoice' and the 'ID' is 'customworkflow31'. The 'OWNER' is 'Dean Carazza'. The right-hand sidebar provides details about the workflow, including its name, record type, description, and schedule.

- ▲ Expectation is that when we execute now it will auto create invoices for our customers and Sales Orders that were showing in the saved search results. Click Execute Now.

SN MC 3 Auto Bill SO Pending Billing: Results List Search Audit Trail

[Edit this Search](#)

FILTERS
STYLE: Normal

NEW	EDIT VIEW	INTERNAL ID	ORDER TYPE	* DATE	AS-OF DATE	PERIOD	TAX PERIOD	TYPE	DOCUMENT NUMBER	NAME ▲	ACCOUNT	MEMO	AMOUNT	AMOUNT UNBILLED
	Edit View	6407	*	05/01/2025		May 2025	May 2025	Sales Order	419	Copper Software Copper Software	9006 Sales Orders		854.85	50.85
	Edit View	6578	*	06/01/2025		Jun 2025	Jun 2025	Sales Order	431	Copper Software Copper Software	9006 Sales Orders		854.85	50.85
	Edit View	6411	*	05/14/2025		May 2025	May 2025	Sales Order	423	Demizz Consulting Demizz Consulting	9006 Sales Orders		6,516.00	5,196.00
	Edit View	6582	*	06/14/2025		Jun 2025	Jun 2025	Sales Order	435	Demizz Consulting Demizz Consulting	9006 Sales Orders		6,516.00	5,196.00
Total													14,741.70	10,493.70

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ To see if working, you can start refreshing your search as expectation is once these Sales Orders have been invoices should no longer show up in the search results

SN MC 3 Auto Bill SO Pending Billing: Results List Search Audit Trail

[Edit this Search](#)

FILTERS

STYLE
Normal

NEW [EDIT](#) [VIEW](#) [PRINT](#) [MAIL](#) [EDIT](#) TOTAL: 3

NEW	EDIT VIEW	INTERNAL ID	ORDER TYPE	*	DATE	AS-OF DATE	PERIOD	TAX PERIOD	TYPE	DOCUMENT NUMBER	NAME ▲	ACCOUNT	MEMO	AMOUNT	AMOUNT UNBILLED
	Edit View	6407		*	05/01/2025		May 2025	May 2025	Sales Order	419	Copper Software Copper Software	9006 Sales Orders		854.85	50.85
	Edit View	6578		*	06/01/2025		Jun 2025	Jun 2025	Sales Order	431	Copper Software Copper Software	9006 Sales Orders		854.85	50.85
	Edit View	6411		*	05/14/2025		May 2025	May 2025	Sales Order	423	Demizz Consulting Demizz Consulting	9006 Sales Orders		6,516.00	5,196.00
Total														8,225.70	5,297.70

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

▲ If bring back up can see have been invoiced

- Copper Software SO 419 and 431

 **Sales Order** 🔍
419 Copper Software Copper Software **BILLED**

 **Sales Order** 🔍
431 Copper Software Copper Software **BILLED**

- Demizz Consulting SO 423 and 435

 **Sales Order** 🔍
423 Demizz Consulting Demizz Consulting **BILLED**

 **Sales Order** 🔍
435 Demizz Consulting Demizz Consulting **BILLED**

- ▲ Also created a Invoice Saved Search List View that will show me transactions created from scheduled workflow with date created of today see

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Also created a Invoice Saved Search List View that will show me transactions created from scheduled workflow with date created of today see invoices created and help tie out
 - Criteria Tab

Customize Transaction Search Results
SN Auto Bill Transaction Default View

Save Cancel Preview New Template Change ID Actions

SEARCH TITLE *
SN Auto Bill Transaction Default View

ID
customsearchtransactiondefaultview

OWNER *
Dean Carazza

PUBLIC

AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW
 AVAILABLE AS SUBLIST VIEW
 AVAILABLE FOR REMINDERS
 SHOW IN MENU

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
FILTER *	DESCRIPTION * FORMULA
Main Line	is true
System Notes : Context	Is Scheduled Workflow

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Also created a Invoice Saved Search List View that will show me transactions created from scheduled workflow with date created of today see invoices created and help tie out

- Results Tab

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
Name DESCENDING

THEN BY DESCENDING

THEN BY DESCENDING

OUTPUT TYPE
Normal

CONSOLIDATED EXCHANGE RATE
Per-Account

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
:: Date Created					
:: Date					
:: Type					
:: Document Number					
:: Created From : Document Number					Created From Document Number
:: Transaction Number					
:: Name					
:: Account					
:: PO/Check Number					
:: Status					Custom Label
:: Memo					
:: Currency					
:: Amount (Foreign Currency)					
:: Amount					
:: Posting					

#3 Transforming Sales Orders Pending Billing Into Invoices - Continued

- ▲ Can See Amount Invoiced Matches the Amount on our Auto Billing Saved Search expected to be Billed \$10,493.70

Invoices List Search Audit Trail

VIEW SN Auto Bill Default Edit View New Transaction

FILTERS

TYPE: Invoice EMPLOYEE: - All - DATE CREATED: today FROM: 06/19/2025 TO: 06/19/2025 STATUS: - All - STYLE: Normal

EDIT

QUICK SORT TOTAL: 4

NEW	EDIT VIEW	INTERNAL ID	DATE CREATED	DATE	DOCUMENT NUMBER	CREATED FROM DOCUMENT NUMBER	NAME *	ACCOUNT	PO/CHECK NUMBER	STATUS	MEMO	CURRENCY	AMOUNT (FOREIGN CURRENCY)	AMOUNT
	Edit View	37770	06/19/2025 8:59 pm	06/19/2025	402	419	Copper Software Copper Software	1110 Accounts Receivable : Trade Receivables		Open		US Dollar	\$50.85	50.85
	Edit View	37771	06/19/2025 8:59 pm	06/19/2025	403	431	Copper Software Copper Software	1110 Accounts Receivable : Trade Receivables		Open		US Dollar	\$50.85	50.85
	Edit View	37769	06/19/2025 8:58 pm	06/19/2025	401	435	Demizz Consulting Demizz Consulting	1110 Accounts Receivable : Trade Receivables		Open		US Dollar	\$5,196.00	5,196.00
	Edit View	37861	06/19/2025 9:03 pm	06/19/2025	404	423	Demizz Consulting Demizz Consulting	1110 Accounts Receivable : Trade Receivables		Open		US Dollar	\$5,196.00	5,196.00
Total													10,493.70	10,493.70

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/>
 - https://www.linkedin.com/mynetwork/discovery-see-all/?usecase=PEOPLE_FOLLOWS&followMember=dean-carazza-cpa-5b511553
- ▲ Will be hosting monthly with next one targeted to be Friday 7/18/25 12–1PM PST
 - Target Agenda:
 - Saved Reports Customization
- ▲ If you have any NetSuite pain points, enhancements, integrations or any questions we would be happy to setup a quick chat and see how we can help
 - Send me an email or give me a call or grab time on my calendar
 - dcarazza@scalenorth.com
 - 714–350–6211
 - <https://calendly.com/dcarazza-1>



NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

scalenorth.com

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