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

June 20, 2025

Confidentiality Notice

Objective

▲ We have started hosting these monthly NetSuite Master Classes, because we have found most common challenges people have with NetSuite

- Lack of Training
  - Take advantage of saved search reporting
  - CSV Imports
  - Mass Updates
  - Simple workflows to automate processes
  - Custom Records, Forms, Fields
  - Advanced PDFs
- Don't Know what I don't Know

▲ Our goal is to teach these things so companies and more importantly their employees can maximize the value and utility they get out of the NetSuite Platform/Ecosystem

Agenda

- ▲ Introductions
  - − ScaleNorth
    - ▪ Quick ScaleNorth Overview
- ▲ Examples and Use Cases
  - − #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
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

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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

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275+
Team Members

680+
NetSuite Certifications Held by Staff

$2.5B+
Annual Revenue Transactions Processed

1,650+
Years of Collective NetSuite ERP Experience

8.5+
Avg Years of NetSuite Experience

57%
Percentage of staff with CPAs

ORACLE NETSUITE
BPO Partner

ORACLE NETSUITE
Solution Provider

ORACLE NETSUITE
SuiteCloud Developer Network

Last updated on February 17, 2025

Services at a Glance

NetSuite Implementation

Outsourced Accounting

NetSuite Consulting & Managed Services

Technical Services

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Technology Partners

#1 Transforming Approved Estimate into a Sales Order
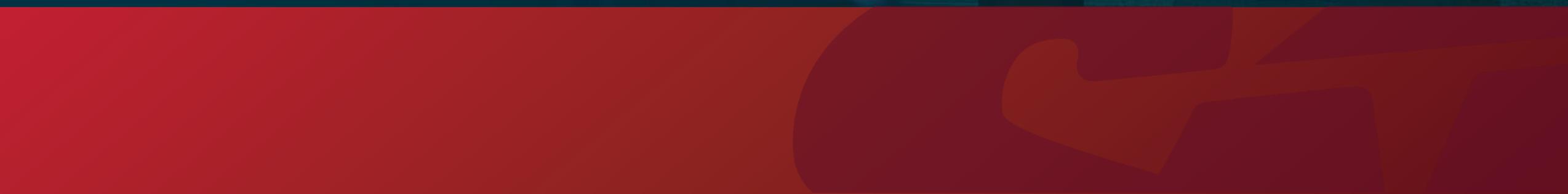
#1 Transforming Approved Estimate into Sales Order

▲ Create a Workflow that putts 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

#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

- Name the State – Add Approval Button and Save

#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
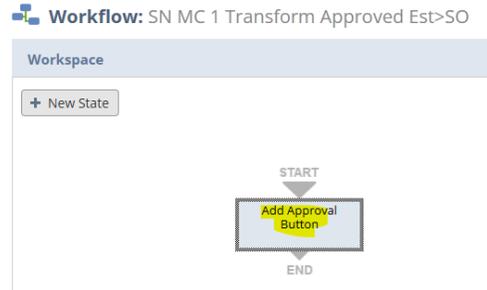
- Click on New Action Button

#1 Transforming Approved Estimate into Sales Order-Continued

▲ Select the Add Button Action

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

#1 Transforming Approved Estimate into Sales Order-Continued

▲ Should now see the action we added and hit Save on the Workflow State

▲ We can test workflow to see if adding button to estimates not yet processed by putting workflow in View mode then entering an estimate

#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

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

#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

#1Transforming 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

#1 Transforming Approved Estimate into Sales Order-Continued

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

▲ 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.

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

#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.

#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

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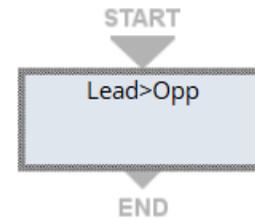
#2 Transforming Lead into an Opp Based on Qualified Criteria – Continued

▲ 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

▲ 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

▲ 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.

#3 Transforming Sales Orders Pending Billing Into Invoices

#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

#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

#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

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

#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

#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

#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 Sate

#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.

▲ 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.

#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

#3 Transforming Sales Orders Pending Billing Into Invoices – Continued

▲ If bring back up can see have been invoiced

  ▪ Copper Software SO 419 and 431

  ▪ Demizz Consulting SO 423 and 435

▲ 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

#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

#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

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

THANK YOU!

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