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ScaleNorth NetSuite MasterClass– Session 12– Solving Problems with Custom Records

September 12, 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
- ▲ Overview, Examples and Use Cases
  - – Creating a Task Tracker leveraging native NetSuite CRM Activities in Combination with a Custom Record, Parent/Child Record, and Custom Fields
  - – Saved Search and Dashboard Reporting
- ▲ 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
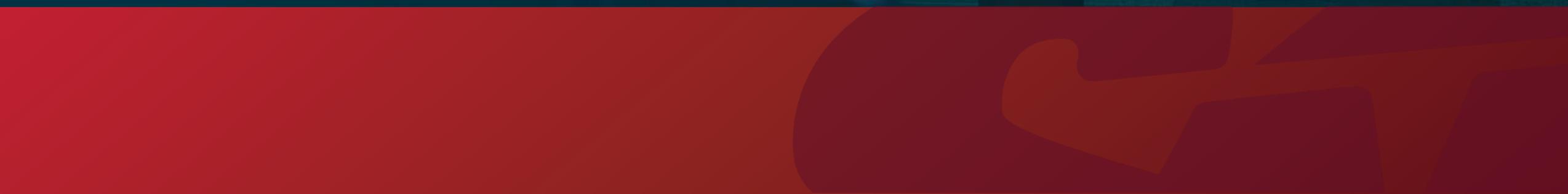
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Technology Partners

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Creating a Task Tracker

Configuration/Development/Testing

Configuration/Development/Testing

▲ Configuration

    – We have identified the following Configuration components to setup/put in place for our desired solution

        1. Create a Custom Record – Weekly Commitment

            › Create a Related Records Subtab

            › Create Fields want on Record

- Weekly Commitment Type
- Date
- Estimated
- Actual
- Notes
- Next Steps
- Assigned To

        2. Create Weekly Commitment Fields on CRM Activity Records we Want to become child records of the Weekly Commitment Custom Record

            › Task

            › Phone Call

            › Event

        3. Create a Saved Search that Can Report on Actuals vs. Expected

        4. Add Saved Search to Home Dashboard for ease of reporting/Tracking

▲ What follows are the steps and screen shots to complete the configuration and Development

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1. Create Custom Record

1. Create Custom Record

▲ Navigate to Customization>Lists, Records, & Fields>Record Types>New

▲ Save the Record

Custom Record Type

Weekly Commitment

| Save ▾ | Cancel | Change ID | | Actions |

NAME *
Weekly Commitment

ID
customrecord_sn_weekly_comittment

INTERNAL ID
1326

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 Reco...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

1. Create Custom Record – Continued

▲ Create the Following Fields

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

☐ SHOW INACTIVES

New Field	Move To Top	Move To Bottom

	DESCRIPTION	ID	TYPE	LIST/RECORD	TAB	SHOW IN LIST
⠿	Weekly Commitment Type	custrecord_sn_weekly_commitment_type	List/Record	Weekly Commitment Type List		No
⠿	Date	custrecord_sn_weekly_comittment_date	Date			No
⠿	Estimated	custrecord_sn_weekly_commitment_estimate	Integer Number			No
⠿	Actual	custrecord_sn_weekly_commitment_actual	Integer Number			No
⠿	Notes	custrecord_sn_weekly_commitment_notes	Rich Text			No
⠿	Next Steps	custrecord_sn_weekly_commitment_next_ste	Free-Form Text			No
⠿	Assigned To	custrecord_sn_weekly_commitment_assigned	List/Record	Employee		No

Custom List

Save ▾	Cancel	Change ID	Actions

Unlock 1Password

NAME *
Weekly Commitment Type List 🔒ⓘ

ID
customlist_sn_weekly_comittment_type_l

INTERNAL ID
1327

OWNER
Dean Carazza

DESCRIPTION

SHOW OPTIONS IN: ⦿ THE ORDER ENTERED ○ ALPHABETICAL ORDER
☐ CONVERT TO CUSTOM RECORD
☐ INACTIVE

- *This custom list was created New when creating the List/Record Field*

Values •	Translation •	History •	System Notes

	ID	VALUE *	TRANSLATION	INTERNAL ID	INACTIVE
⠿	val_359099_td2928790_818	# of LN Video Posts		1	
⠿	val_359100_td2928790_620	# of Lunches		2	
⠿	val_359101_td2928790_641	# of Phone Calls	Translation	3	
⠿	val_359102_td2928790_762	# of Meetings		4	

1. Create Custom Record – Continued

▲ Create the Following Fields

☐ SHOW INACTIVES

New Field	Move To Top	Move To Bottom

	DESCRIPTION	ID	TYPE	LIST/RECORD	TAB	SHOW IN LIST
⁞	Weekly Commitment Type	custrecord_sn_weekly_commitment_type	List/Record	Weekly Commitment Type List		No
⁞	Date	custrecord_sn_weekly_comittment_date	Date			No
⁞	Estimated	custrecord_sn_weekly_commitment_estimate	Integer Number			No
⁞	Actual	custrecord_sn_weekly_commitment_actual	Integer Number			No
⁞	Notes	custrecord_sn_weekly_commitment_notes	Rich Text			No
⁞	Next Steps	custrecord_sn_weekly_commitment_next_ste	Free-Form Text			No
⁞	Assigned To	custrecord_sn_weekly_commitment_assigned	List/Record	Employee		No

Custom List

Save ▾	Cancel	Change ID	Actions

NAME *

[Weekly Commitment Type List   🔒ⓘ]

Unlock 1Password

ID
customlist_sn_weekly_comittment_type_l

INTERNAL ID
1327

OWNER
[Dean Carazza ⌄]

DESCRIPTION
[ ]

SHOW OPTIONS IN: ● THE ORDER ENTERED   ○ ALPHABETICAL ORDER
☐ CONVERT TO CUSTOM RECORD
☐ INACTIVE

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⁞	val_359099_td2928790_818	# of LN Video Posts		1	
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⁞	val_359101_td2928790_641	# of Phone Calls	Translation	3	
⁞	val_359102_td2928790_762	# of Meetings		4	

1. Create Custom Record – Continued

▲ Create the Related Records Subtab

▲ Save

Custom Record Type   More

Weekly Commitment

[Save ▾] [Cancel] | [Change ID] | Actions

NAME *
Weekly Commitment

ID
customrecord_sn_weekly_comittment

INTERNAL ID
1326

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 Reco...Entries Permissior ▾

☑ 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

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

ID	TITLE *	TRANSLATION	PARENT
⠿ tab_422_td2928790_399	Related Records		

2. Create Weekly Commitment CRM Fields that can become child records to our custom record

2. Create CRM Fields than can become Child Records to our Custom Record

▲ Create the following CRM Fields

- Navigate to Customization>Lists, Records, & Fields>CRM Fields>New

Custom CRM Fields

New

FILTERS

SHOW INACTIVES   TOTAL: 15

| #	DESCRIPTION	FROM BUNDLE	ID	INTERNAL ID	TYPE	LIST	TAB ▲	TASK	PROJECT TASK	RESOURCE ALLOCATION	PHONE CALL	EVENT	CAMPAIGN
3	ZZZ DUNS Range		custevent1	3793	List/Record	Credit Categories	Main	Y					
4	ZZZ DUNS Terms		custevent2	3796	List/Record	DUNS Terms	Main	Y					
5	ZZZ D&B Delinquency Score Range Field		custevent3	3806	List/Record	ZZZD&B Delinquency Score Range	Main	Y					
6	ZZZ D&B Delinquency Terms		custevent4	3808	List/Record	ZZZ D&B Delinquency Score Terms	Main	Y					
7	ZZZZ D&B Delinquency Score Range Field		custevent5	3812	List/Record	ZZD&B Delinquency Score Range	Main	Y					
8	ZZZZ D&B Delinquency Terms		custevent6	3814	List/Record	ZZZZ D&B Delinquency Score Terms	Main	Y					
9	V2 D&B Delinquency Score Range		custevent7	3816	List/Record	V2 D&V Delinquency Score Range	Main	Y					
10	V2 D&B Delinquency Terms		custevent8	3818	List/Record	V2 D&B Delinquency Score Terms	Main	Y					
11	V3 D&B Delinquency Sore Range		custevent9	3820	List/Record	V3 D&B Delinquency Sore Range	Main	Y					
12	V3 D&B Delinquency Terms		custevent10	3822	List/Record	V3 D&B Delinquency Score Terms	Main	Y					
1	Resource Allocation Chart/Grid 🔒		custevent_atlas_svs_prm_racg_link	2705	Hyperlink					Y			
2	Default Service Item 🔒		custevent_atlas_svs_em_def_svs_item	3205	List/Record	Item			Y				
13	Weekly Commitment Task		custevent_sn_weekly_commitment_task	4601	List/Record	Weekly Commitment		Y					
14	Weekly Commitment Phone Call		custevent_sn_weekly_commitment_phone_ca	4602	List/Record	Weekly Commitment					Y		
15	Weekly Commitment Event		custevent_sn_weekly_commitment_event	4603	List/Record	Weekly Commitment						Y	

2. Create CRM Fields than can become Child Records to our Custom Record – Continued

▲ Weekly Commitment Task

Custom CRM Field

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

LABEL *
Weekly Commitment Task

ID
custevent_sn_weekly_commitment_task

INTERNAL ID
4601

OWNER
Dean Carazza

DESCRIPTION

TYPE
List/Record

LIST/RECORD
Weekly Commitment

☑ STORE VALUE   ☐ USE ENCRYPTED FORMAT

☐ SHOW IN LIST
☐ GLOBAL SEARCH
☑ RECORD IS PARENT
☐ INACTIVE
☐ ENABLE GENERIC TEXT ENHANCE ACTIONS

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

☑ TASK
☐ PROJECT TASK
☐ RESOURCE ALLOCATION
☐ PHONE CALL

☐ EVENT
☐ CAMPAIGN   ☐ PER KEYWORD
☐ AVAILABLE EXTERNALLY

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

INSERT BEFORE
- Unchanged -

SUBTAB

DISPLAY TYPE
Normal

HELP

PARENT SUBTAB
Related Records

2. Create CRM Fields than can become Child Records to our Custom Record – Continued

▲ Weekly Commitment Phone Call

Custom CRM Field

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

LABEL *
Weekly Commitment Phone Call

ID
custevent_sn_weekly_commitment_phone_ca

INTERNAL ID
4602

OWNER
Dean Carazza

DESCRIPTION

TYPE
List/Record ▾

LIST/RECORD
Weekly Commitment ▾

☑ STORE VALUE ☐ USE ENCRYPTED FORMAT

☐ SHOW IN LIST
☐ GLOBAL SEARCH
☑ RECORD IS PARENT
☐ INACTIVE
☐ ENABLE GENERIC TEXT ENHANCE ACTIONS

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

☐ TASK
☐ PROJECT TASK
☐ RESOURCE ALLOCATION
☑ PHONE CALL

☐ EVENT
☐ CAMPAIGN ☐ PER KEYWORD
☐ AVAILABLE EXTERNALLY

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

INSERT BEFORE
- Unchanged - ▾

SUBTAB
▾

DISPLAY TYPE
Normal ▾

HELP

PARENT SUBTAB
Related Records ▾

2. Create CRM Fields than can become Child Records to our Custom Record – Continued

▲ Weekly Commitment Event

Custom CRM Field

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

LABEL *
Weekly Commitment Event

ID
custevent_sn_weekly_commitment_event

INTERNAL ID
4603

OWNER
Dean Carazza

DESCRIPTION

TYPE
List/Record ▼

LIST/RECORD
Weekly Commitment ▼
☑ STORE VALUE   ☐ USE ENCRYPTED FORMAT

☐ SHOW IN LIST
☐ GLOBAL SEARCH
☑ RECORD IS PARENT
☐ INACTIVE
☐ ENABLE GENERIC TEXT ENHANCE ACTIONS

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

☐ TASK
☐ PROJECT TASK
☐ RESOURCE ALLOCATION
☐ PHONE CALL

☑ EVENT
☐ CAMPAIGN   ☐ PER KEYWORD
☐ AVAILABLE EXTERNALLY

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

INSERT BEFORE
- Unchanged - ▼

SUBTAB
▼

DISPLAY TYPE
Normal ▼

HELP

PARENT SUBTAB
Related Records ▼

2. Create CRM Fields than can become Child Records to our Custom Record – Continued

▲ Create a Test Record

- Navigate to Customization>Lists, Records, & Fields>Record Types
  - Find in List and go to More top right corner>View Records>New Button to create new
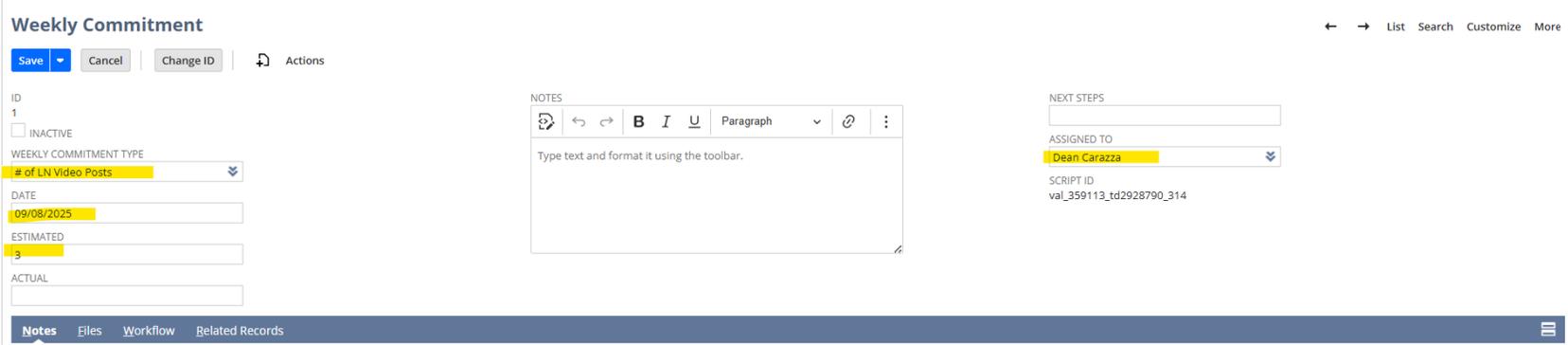
▲ Add two Task Records 1 – Completed the other blank
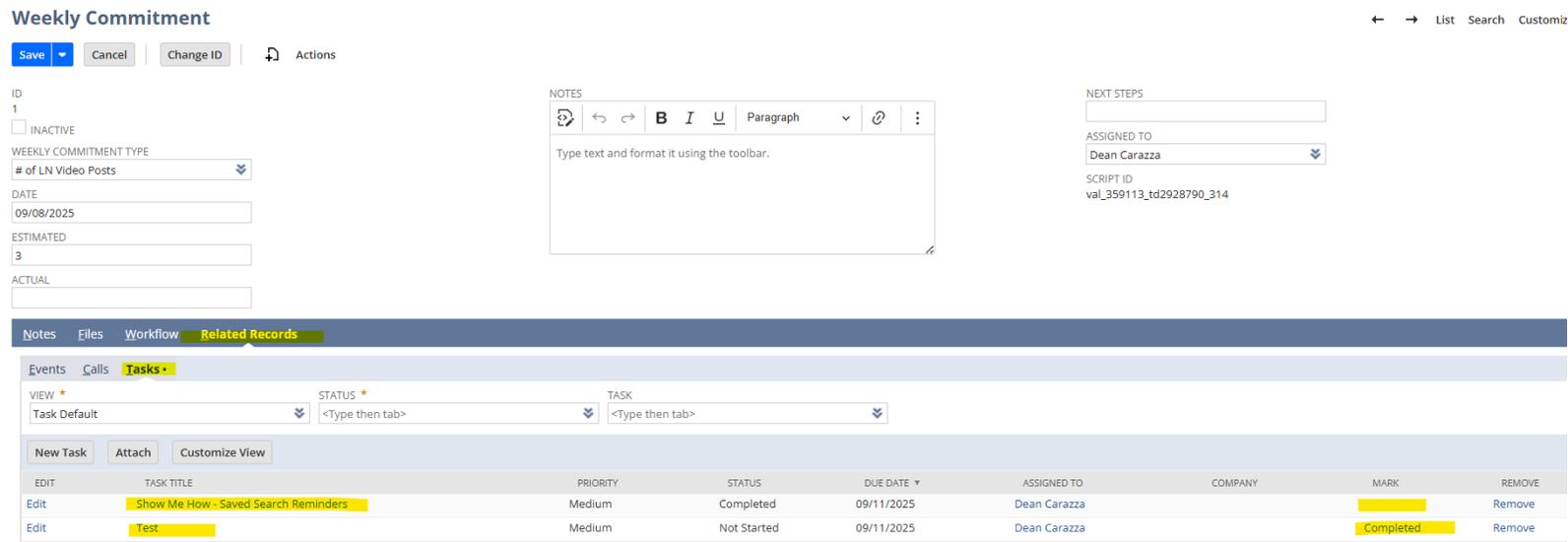
3. Create Saved Search that Can Report Actuals vs. Expected

3. Create a Saved Search that Can Report Actuals vs. Expected

▲ Navigate to Reports>New Search>Weekly Commitment
- Ctrl + F5 – did a hard refresh – and then showed up and could work
- If not working error – can try creating from List View and then saving as search and that worked
- Criteria Tab

Saved Weekly Commitment Search   List   Search   More

SN Weekly Commitment Search

[Save & Run ▾]   [Cancel]   [Preview]   [New Template]   [Change ID] | Actions

SEARCH TITLE *   ☑ AVAILABLE AS DASHBOARD VIEW
SN Weekly Commitment Search   ☑ AVAILABLE AS SUBLIST VIEW
ID   ☐ AVAILABLE FOR REMINDERS
customsearch2622   ☐ SHOW IN MENU
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 specify criteria that narrow down your search.

☐ USE EXPRESSIONS

Standard ·   Summary

FILTER *	DESCRIPTION *	FORMULA
Assigned To	is me	

3. Create a Saved Search that Can Report Actuals vs. Expected – Continued

▲ Results Tab

3. Create a Saved Search that Can Report Actuals vs. Expected – Continued

▲ Formulas

- Estimated

  ▪ max({custrecord_sn_weekly_commitment_estimate})

- Actual

  ▪ case when max(nvl({custrecord_sn_weekly_commitment_actual},0))>0 then max(nvl({custrecord_sn_weekly_commitment_actual},0)) else count(case when {custevent_sn_weekly_commitment_phone_ca.status}='Completed' then {custevent_sn_weekly_commitment_phone_ca.internalid} end)+count(case when {custevent_sn_weekly_commitment_event.status}='Completed' then {custevent_sn_weekly_commitment_event.internalid} end)+count(case when {custevent_sn_weekly_commitment_task.status}='Completed' then {custevent_sn_weekly_commitment_task.internalid} end) end

- Difference

  ▪ case when max(nvl({custrecord_sn_weekly_commitment_actual},0))>0 then max(nvl({custrecord_sn_weekly_commitment_actual},0)) else count(case when {custevent_sn_weekly_commitment_phone_ca.status}='Completed' then {custevent_sn_weekly_commitment_phone_ca.internalid} end)+count(case when {custevent_sn_weekly_commitment_event.status}='Completed' then {custevent_sn_weekly_commitment_event.internalid} end)+count(case when {custevent_sn_weekly_commitment_task.status}='Completed' then {custevent_sn_weekly_commitment_task.internalid} end) end-max({custrecord_sn_weekly_commitment_estimate})

3. Create a Saved Search that Can Report Actuals vs. Expected – Continued

▲ Available Filters

3. Create a Saved Search that Can Report Actuals vs. Expected – Continued

▲ Save/Run Results

SN Weekly Commitment Search: Results

List   Search   Audit Trail

Return To Criteria

➕ FILTERS

TOTAL: 1

WEEKLY COMMITMENT TYPE	ESTIMATED ▲	ACTUAL	DIFFERENCE
# of LN Video Posts	3	1	-2
Total	**3.0**	**1.0**	**-2.0**

4. Add to Home Dashboard

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4. Add to Home Dashboard

▲ Click on Home Page Icon
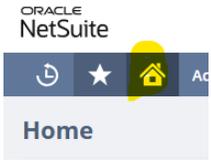
▲ Top right corner select personalize
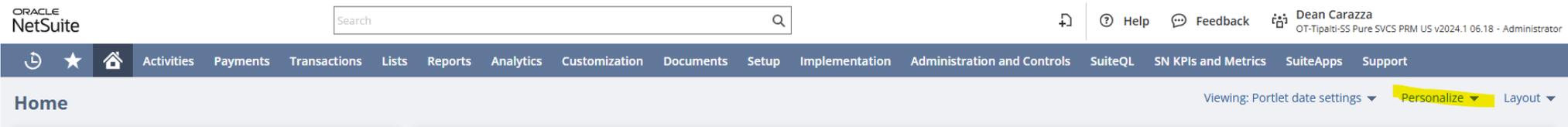
▲ Select Custom Search
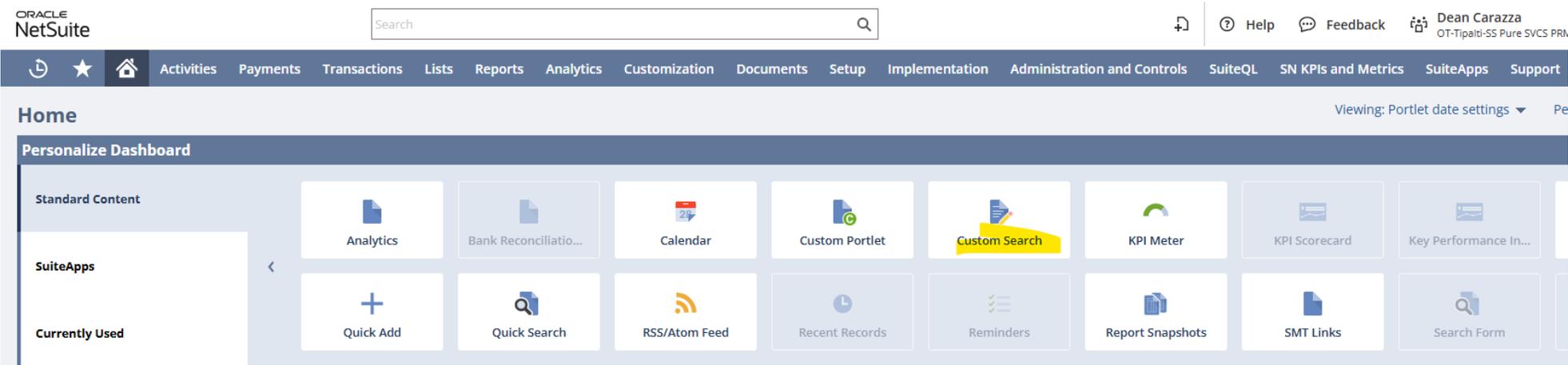
4. Add to Home Dashboard – Continued

▲ Custom Search

   - Select the three dots to setup
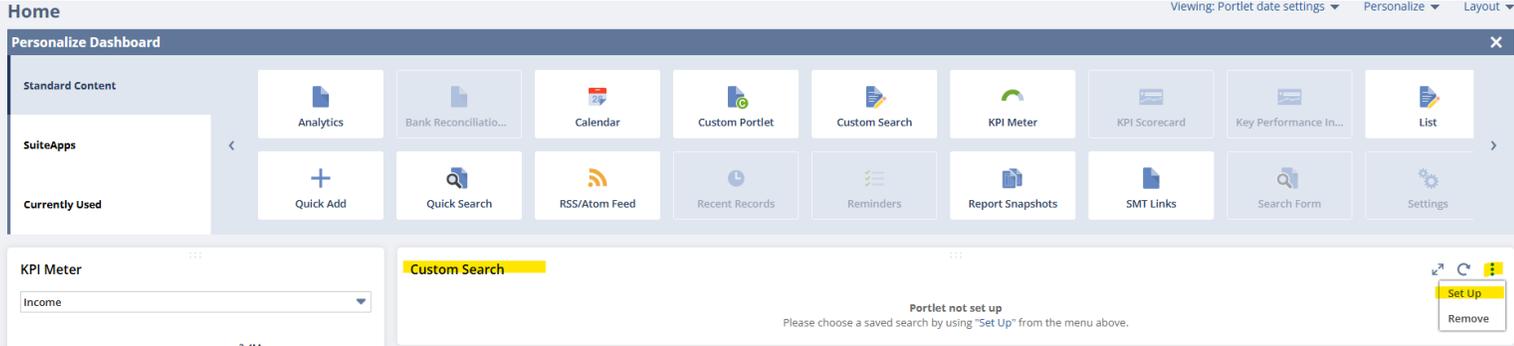
   - Can find search by searching in name box
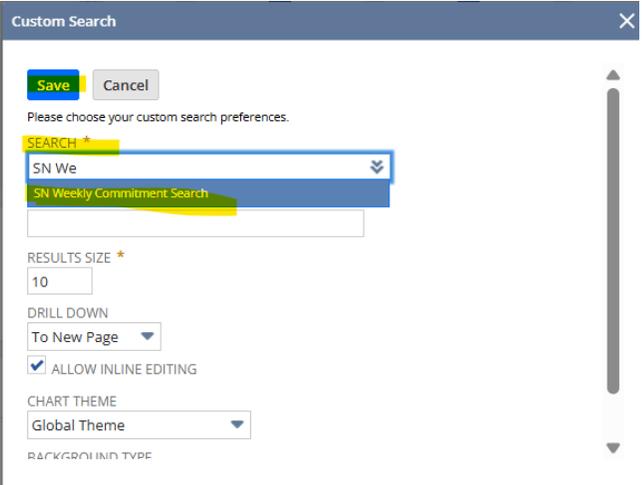
4. Add to Home Dashboard – Continued

▲ Custom Search Added to Home Dashboard

Questions?

Next Steps

- ▲ Follow me and ScaleNorth on LinkedIn. Will be posting the materials from today on our LinkedIn
  - https://www.linkedin.com/mynetwork/discovery-see-all/?usecase=PEOPLE_FOLLOWS&followMember=dean-carazza-cpa-5b511553
- ▲ 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 10/24/25 12–1PM PST
  - Topic TBD

- ▲ If you have any NetSuite pain points, enhancements, integrations or any questions we would be happy to setup a quick chat and see how we can help
  - Send me an email or give me a call or grab time on my calendar
    - dcarazza@scalenorth.com
    - 714–350–6211
    - https://calendly.com/dcarazza-1

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THANK YOU!

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