



ScaleNorth NetSuite MasterClass— Session 14-Live Build: Create a Self-Running Project Risk AI Agent in NetSuite

November 21, 2025

Confidentiality Notice

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Objective

- ▲ We have started hosting these monthly NetSuite Master Classes, because we have found most common challenges people have with NetSuite
 - Lack of Training
 - Take advantage of saved search reporting
 - CSV Imports
 - Mass Updates
 - Simple workflows to automate processes
 - Custom Records, Forms, Fields
 - Advanced PDFs
 - Don't Know what I don't Know
- ▲ Our goal is to teach these things so companies and more importantly their employees can maximize the value and utility they get out of the NetSuite Platform/Ecosystem

Agenda

▲ Introductions

- ScaleNorth
 - Quick ScaleNorth Overview

▲ Overview, Examples and Use Cases

- Create an AI Agent that will detect project risk and update project record and alert project manager of reason project has been flagged at risk.
- Solution will Leverage
 - Saved Searches, Workflow, Workflow Action Script, AI Prompt – from Prompt Studio

▲ 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

- ▲ 15 years of experience
- ▲ Public and Private Accounting
- ▲ 9 years NetSuite Experience
 - 2 Years Private/User - Assistant Controller for \$100M Distributor in Irvine
 - 7 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



Disclaimer – purpose of this class is for demonstration/educational purposes. Additionally recommend any configuration and testing always be done in a Sandbox environment first before creating/deploying in production. ScaleNorth is not responsible for any actions not performed by ScaleNorth.

Live Build: Create a Self-Running Project Risk AI Agent in NetSuite

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

Configuration/Development/Testing

▲ Configuration

- We have identified the following Configuration components to setup/put in place for our desired solution
 1. Create a Project at Risk and Project at Risk Notes Fields on Project Records
 2. Create an AI Prompt Saved Search that can be used to pass project info/variables into the AI Prompt for analysis
 3. Create an AI Prompt in Prompt Studio
 - › Prompt that will take the inputs from Saved Search to Analyze and return response in JSON Format that script can then use to automate updating the related Project Records for the Risk Response.
 4. Create a Workflow Project Risk Saved Search that can feed the workflow the list of projects for workflow action script to run and pass project info/variables into AI Prompt created.
 6. Create the Workflow described in #4 above with workflow action script and send email action to alert project managers of projects that get flagged at risk.

▲ Development

5. Create a Workflow Action Script that the Workflow can use as described in #2 and #4 to get back Project Risk Response from AI Prompt and update the corresponding Project Record Accordingly.

▲ Testing

7. Release the Workflow and test to see how accurate solution was at assessing project risk, updating related project records, and notifying project managers of projects that have become At Risk.

- ▲ What follows are the steps and screen shots to complete the configuration, development, and testing of the solution

1. Create Project at Risk and Project at Risk Notes Fields on Project Record

A background image of a meeting in a modern office. A man in a suit is standing and presenting to a group of people seated around a long table. The room has large windows and a brick wall. The image is overlaid with a dark teal color.

1. Configuration – Create Project At Risk Fields

- ▲ Navigate to Customization>Lists, Records, & Fields>Entity Fields>
 - Create Project at Risk Checkbox Field

Custom Entity Field

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

LABEL *
Project At Risk

ID
custentity_job_at_risk

INTERNAL ID
4676

OWNER
Chris Koch

DESCRIPTION

TYPE
Check Box

LIST/RECORD

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

CUSTOMER
 PROJECT
 VENDOR
 EMPLOYEE
 OTHER NAME

CONTACT
 PARTNER
 GENERIC RESOURCE
 WEB SITE
 GROUP

AVAILABLE EXTERNALLY
 PRINT ON STATEMENT
 PRINT ON PRICE LIST
 PROJECT TEMPLATE

Custom Entity Field

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

LABEL *
Project At Risk

ID
custentity_job_at_risk

INTERNAL ID
4676

OWNER
Chris Koch

DESCRIPTION

TYPE
Check Box

LIST/RECORD

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

INSERT BEFORE
Unchanged

SUBTAB
Main

DISPLAY TYPE
Normal

HELP

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

1. Configuration – Create Project At Risk Fields - Continued

- ▲ Navigate to Customization>Lists, Records, & Fields>Entity Fields>
 - Create Project at Risk Notes Field

Custom Entity Field

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

LABEL *
Project At Risk Notes

ID
custentity_job_at_risk_notes

INTERNAL ID
4677

OWNER
Chris Koch

DESCRIPTION

TYPE
Rich Text

LIST/RECORD

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

CUSTOMER
 PROJECT
 VENDOR
 EMPLOYEE
 OTHER NAME

CONTACT
 PARTNER
 GENERIC RESOURCE
 WEB SITE
 GROUP

AVAILABLE EXTERNALLY
 PRINT ON STATEMENT
 PRINT ON PRICE LIST
 PROJECT TEMPLATE

Custom Entity Field

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

LABEL *
Project At Risk Notes

ID
custentity_job_at_risk_notes

INTERNAL ID
4677

OWNER
Chris Koch

DESCRIPTION

TYPE
Rich Text

LIST/RECORD

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

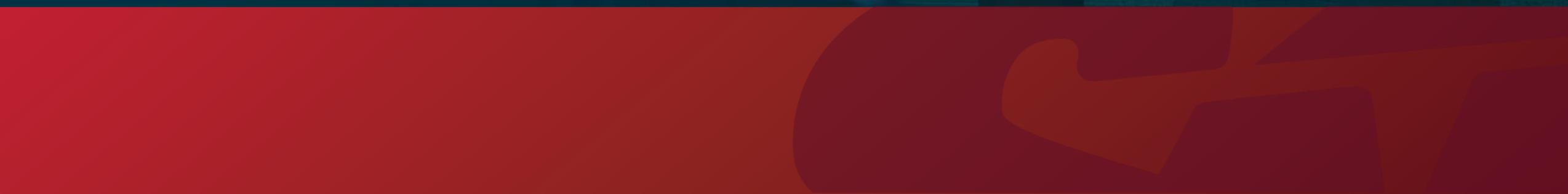
INSERT BEFORE
- Unchanged -

SUBTAB
Main

DISPLAY TYPE
Normal

HELP

2. Configuration – AI Prompt Saved Search



2. Configuration – Create AI Prompt Saved Search

- ▲ Navigate to Reports>New Search>Project Search
 - Name Search – SN MC AI Prompt – Project Risk Saved Search
 - No criteria since will already be filtered by the Workflow Project Risk Saved Search that we will create later
 - Results Tab

SEARCH TITLE *
SN MC AI Prompt Project Risk Saved Search

ID
customsearch2639

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
 RUN UNRESTRICTED MAX RESULTS DISALLOW DRILL DOWN
 MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields
Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUM
Formula (Text)			projectmanager		project_manager			
Status					status			
Planned Work					planned_work			
Allocated Work					allocated_work			
Actual Work					actual_work			
Remaining Work					remaining_work			
Percent Time Complete					percent_time_complete			
Percent Complete by Resource Allocation					percent_complete_resource			
Start Date					start_date			
Calculated End Date					calculated_end_date			
Actual End Date					actual_end_date			

Note, your column/labels must match exactly to the prompt. Any upper case, lower case, or not exact match the script will fail

Note, reason that we use a formula text field for Dropdown Fields, is because when a script runs a saved search, dropdown fields are returned as the internal ID of that field value, and in our case passing internal ID of 7 will not help the AI Prompt assess project risk, but text value the language learning model/prompt can use.

Also, use Underscore for custom labels so a bit easier for script to pick up without spaces

2. Configuration – Create AI Prompt Saved Search - Continued

▲ Saved Search Results

ORACLE NetSuite [Help](#) [Feedback](#) **Dean Carazza**
OT-Tipalti-SS Pure SVCS PRM US v2024.1 06.18 - Administrator

Activities Payments Transactions **Lists** Reports Analytics Customization Documents Setup Commerce Implementation Administration and Controls SuiteQL SN KPIs and Metrics SuiteApps Support

SN MC AI Prompt - Project Risk Saved search: Results [List](#) [Search](#) [Audit Trail](#)

[Edit this Search](#)

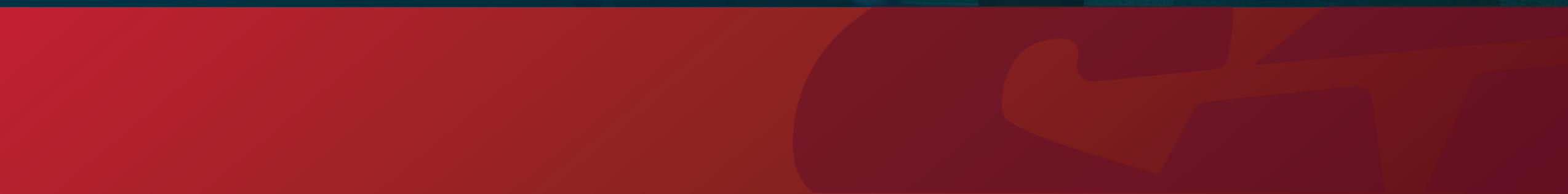
FILTERS

EDIT

TOTAL: 42

NEW	EDIT VIEW	INTERNAL ID	PROJECT_MANAGER	STATUS	PLANNED_WORK	ALLOCATED_WORK	ACTUAL_WORK	REMAINING_WORK	PERCENT_TIME_COMPLETE	PERCENT_COMPLETE_RESOURCE	START_DATE	CALCULATED_END_DATE	ACTUAL_END_DATE
	Edit View	9624		In Progress	0	0	0	0	0.0%	0.0%	11/21/2025		
	Edit View	1017	Marc Collins	In Progress	72	65	40	32	55.6%	61.5%	11/21/2025	11/30/2025	
	Edit View	1018	Marc Collins	In Progress	120	305	40	80	33.3%	13.1%	10/07/2025	10/19/2025	
	Edit View	1019	Marc Collins	In Progress	108	269	80	80	74.1%	29.7%	10/08/2025	10/18/2025	
	Edit View	1020	Marc Collins	In Progress	164	194	42	122	25.6%	21.6%	10/08/2025	11/08/2025	
	Edit View	1021	Marc Collins	Pending	164	184	0	164	0.0%	0.0%	11/18/2025	12/15/2025	
	Edit View	1022	Marc Collins	Pending	200	1,271	0	200	0.0%	0.0%	12/31/2025	01/31/2026	
	Edit View	1028	Marc Collins	In Progress	160	257	64	96	40.0%	24.9%	11/08/2025	11/23/2025	
	Edit View	1023		Internal	0	16	0	0	0.0%	0.0%	11/10/2025		
	Edit View	1024		On Hold	0	16	0	0	0.0%	0.0%	11/10/2025		
	Edit View	1025		On Hold	0	16	0	0	0.0%	0.0%	11/10/2025		
	Edit View	1026	Marc Collins	In Progress	288	769	80	208	27.8%	10.4%	10/31/2025	12/05/2025	
	Edit View	1029	Marc Collins	In Progress	200	1,100	80	120	40.0%	7.3%	11/05/2025	12/05/2025	

3. Configuration – Create AI Prompt

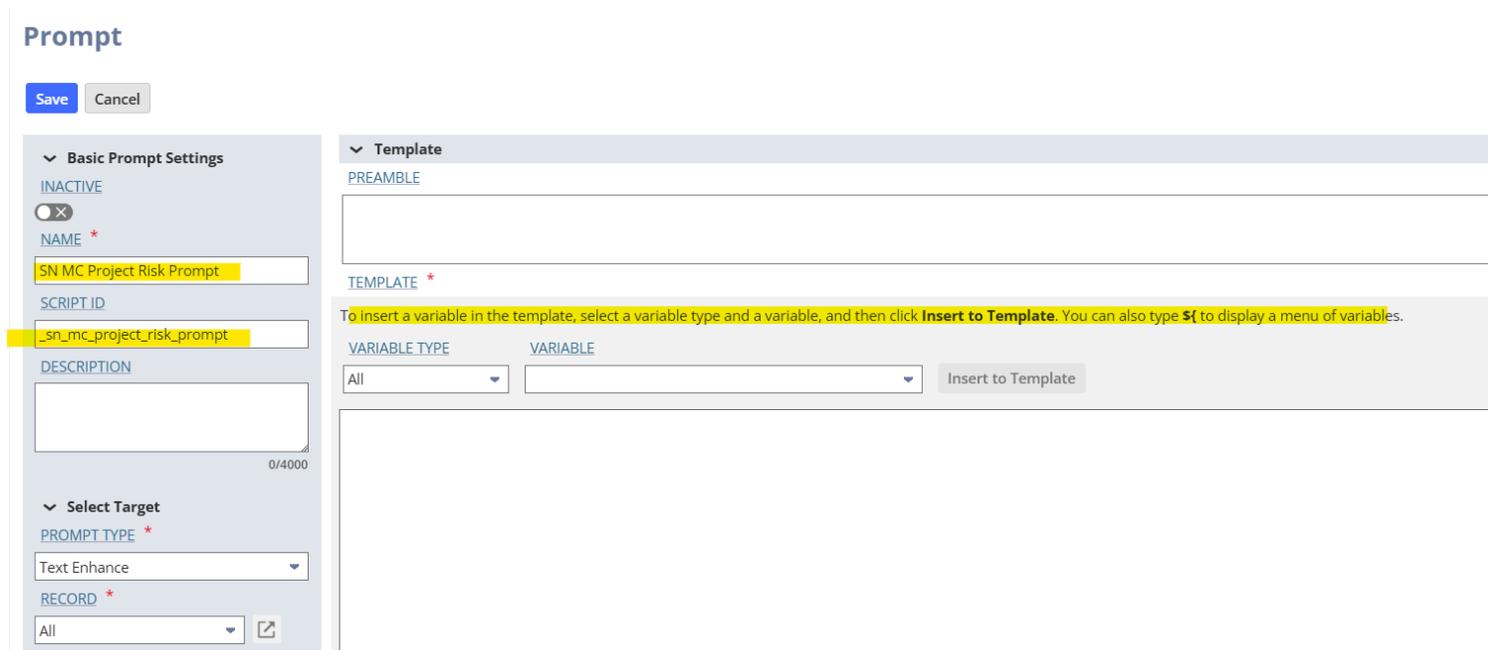


3. Configuration – Create AI Prompt

- ▲ Navigate to Setup>Company>AI Prompt Studio
 - Click + Create Prompt



- While Prompt Type = Text Enhance, can see that wants variables to be entered in a `{}` format



3. Configuration – Create AI Prompt - Continued

▲ Below are the fields and Prompt Response copied from Chat GPT when asked for help to create a Project Risk Prompt.

- You are an expert project risk analyst. You will be given detailed data points about a project, such as progress metrics, deadlines, resource allocation, stakeholder feedback, and budget status.
- Your task is to determine whether the project is currently AT RISK or NOT AT RISK.
- Carefully analyze the provided information to decide if there are any signs of delays, overruns, poor performance, resource shortages, or communication issues that could threaten project success.

Prompt

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

Basic Prompt Settings

INACTIVE

NAME *

SN MC Project Risk Prompt

SCRIPT ID

_sn_mc_project_risk_prompt

DESCRIPTION

0/4000

Select Target

PROMPT TYPE *

Generic

Model Settings

MODEL FAMILY *

Cohere Command R Plus

MAX TOKENS *

4000

TEMPERATURE *

0.2

TOP P *

0.7

TOP K *

500

PRESENCE PENALTY *

0

FREQUENCY PENALTY *

0

Template

PREAMBLE

TEMPLATE *

You are an expert project risk analyst. You will be given detailed data points about a project, such as progress metrics, deadlines, resource allocation, stakeholder feedback, and budget status.

Your task is to determine whether the project is currently AT RISK or NOT AT RISK.

Carefully analyze the provided information to decide if there are any signs of delays, overruns, poor performance, resource shortages, or communication issues that could threaten project success.

VARIABLES IN TEMPLATE

REPLACE VARIABLE WITH VALUE

No data available

Preview

PROMPT TO PREVIEW

You are an expert project risk analyst. You will be given detailed data points about a project, such as progress metrics, deadlines, resource allocation, stakeholder feedback, and budget status.

Your task is to determine whether the project is currently AT RISK or NOT AT RISK.

Carefully analyze the provided information to decide if there are any signs of delays, overruns, poor performance, resource shortages, or communication issues that could threaten project success.

PROMPT RESULT PREVIEW

3. Configuration – Create AI Prompt - Continued

- ▲ Next we want to add the following text into our template so that it outputs the response in a JSON format so can be easily used by the script we will create to take the response and update the related project records

Output your response in the following strict JSON format only (no additional text):

```
{"custentity_job_at_risk": true/false, "custentity_job_at_risk_notes": "<b>HTML</b> formatted response for why project is <u>at risk</u> <b>OR</b> <i>not</i>"}
```

Prompt

Save Cancel

Basic Prompt Settings

INACTIVE

NAME *

SN MC Project Risk Prompt

SCRIPT ID

_sn_mc_project_risk_prompt

DESCRIPTION

0/4000

Select Target

PROMPT TYPE *

Generic

Template

PREAMBLE

TEMPLATE *

You are an expert project risk analyst. You will be given detailed data points about a project, such as progress metrics, deadlines, resource allocation, stakeholder feedback, and budget status.

Your task is to determine whether the project is currently AT RISK or NOT AT RISK.

Carefully analyze the provided information to decide if there are any signs of delays, overruns, poor performance, resource shortages, or communication issues that could threaten project success.

Output your response in the following strict JSON format only (no additional text):

```
{"custentity_job_at_risk": true/false, "custentity_job_at_risk_notes": "<b>HTML</b> formatted response for why project is <u>at risk</u> <b>OR</b> <i>not</i>"}
```

3. Configuration – Create AI Prompt - Continued

- ▲ Next, we can start adding the result columns/variables from our AI Prompt Saved Search as variables in the prompt that we want the prompt to analyze risk for

Saved Project Search
SN MC AI Prompt Project Risk Saved Search

Save & Run | Cancel | Preview | New Template | Change ID | Actions

SEARCH TITLE *
SN MC AI Prompt Project Risk Saved Search

ID
customsearch2637

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 DRI

MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields

Remove all | Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL
Formula (Text)			{projectmanager}		project_manager
Status					status
Planned Work					planned_work
Allocated Work					allocated_work
Actual Work					actual_work
Remaining Work					remaining_work
Percent Time Complete					percent_time_complete
Percent Complete by Resource Allocation					percent_complete_resource
Start Date					start_date
Calculated End Date					calculated_end_date
Actual End Date					actual_end_date

Project data to analyze:

Project Manager: \${project_manager}

Status: \${status}

Start Date: \${start_date}

Calculated End Date:
\${calculated_end_date}

Actual End Date: \${actual_end_date}

Planned Work: \${planned_work}

Allocated Work: \${allocated_work}

Actual Work: \${actual_work}

Remaining Work: \${remaining_work}

Percent Complete By Time Entries:

\${percent_time_complete}

Percent Complete by Allocated Work:

\${percent_complete_resource}

3. Configuration – Create AI Prompt - Continued

- Next, we can start adding some of the result columns/variables from our AI Prompt Saved Search as variables in the prompt that we want the prompt to analyze risk for

Project data to analyze:

Project Manager: `${project_manager}`

Status: `${status}`

Start Date: `${start_date}`

Calculated End Date:

`${calculated_end_date}`

Actual End Date: `${actual_end_date}`

Planned Work: `${planned_work}`

Allocated Work: `${allocated_work}`

Actual Work: `${actual_work}`

Remaining Work: `${remaining_work}`

Percent Complete By Time Entries:

`${percent_time_complete}`

Percent Complete by Allocated Work:

`${percent_complete_resource}`

Prompt

Save Cancel

Basic Prompt Settings

INACTIVE



NAME *

SN MC Project Risk Prompt

SCRIPT ID

_sn_mc_project_risk_prompt

DESCRIPTION

0/4000

Select Target

PROMPT TYPE *

Generic

Model Settings

MODEL FAMILY *

Cohere Command R Plus

MAX TOKENS *

Template

PREAMBLE

TEMPLATE *

Output your response in the following strict JSON format only (no additional text):

`{"custentity_job_at_risk": true/false, "custentity_job_at_risk_notes": "HTML formatted response for why project is <u>at risk</u> OR <u>not</u>"}`

Project data to analyze:
Project Manager: `${project_manager}`
Status: `${status}`
Start Date: `${start_date}`
Calculated End Date: `${calculated_end_date}`
Actual End Date: `${actual_end_date}`
Planned Work: `${planned_work}`
Allocated Work: `${allocated_work}`
Actual Work: `${actual_work}`
Remaining Work: `${remaining_work}`
Percent Complete By Time Entries: `${percent_time_complete}`
Percent Complete by Allocated Work: `${percent_complete_resource}`

VARIABLES IN TEMPLATE

REPLACE VARIABLE WITH VALUE

3. Configuration – Create AI Prompt - Continued

- ▲ Save the Prompt
- ▲ Next we can try testing out the language learning model using the Generate Preview option
 - You can key in some values that might make a project look at risk and then hit Generate Preview to see what response it gives and if gives back in the JSON format we will need for our script

- Example

- Start Date = 11/1/25
- Planned Work = 1,000
- Actual Work = 1,120
- Remaining Work = 300

The screenshot displays the configuration interface for an AI prompt. On the left, the 'Basic Prompt Settings' panel shows the prompt name 'V1 SN MC Project Risk Prompt' and the script ID 'v1_sn_mc_project_risk_prompt'. The 'Model Settings' section is configured with 'Cohere Command R Plus' as the model family, 4000 max tokens, 0.2 temperature, and 0.7 top P. The 'Template' section on the right contains a prompt that asks for a JSON response based on project data. A table below the template lists variables to be replaced with values: 'start_date' (11/1/25), 'planned_work' (1000), 'actual_work' (1120), and 'remaining_work' (300). A red circle highlights the 'Generate Preview' button. The 'Preview' section at the bottom shows the prompt to be previewed and the resulting JSON output, which includes fields like 'current_job_at_risk', 'current_job_at_risk_notes', and project data.

VARIABLES IN TEMPLATE	REPLACE VARIABLE WITH VALUE
project_manager	
status	
start_date	11/1/25
calculated_end_date	
actual_end_date	
planned_work	1000
allocated_work	
actual_work	1120
remaining_work	300
percent_time_complete	
percent_complete_resource	

3. Configuration – Create AI Prompt - Continued

- ▲ Show Prompt Usage Section
 - Setup>Company>AI>AI Preferences
 - Prompt Studio Subtab
 - Suite Script Subtab

4. Configuration – Create the Workflow Project Risk Saved Search

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

4. Configuration – Create Workflow Project Risk Search

- ▲ Navigate to Reports>New Search>Project Search
 - Name Search – SN MC Workflow Project Risk Search
 - Criteria Tab

Saved Project Search

SN MC Workflow Project Risk Saved Search

Save & Run | Cancel | Preview | New Template | Change ID | Actions

SEARCH TITLE *

SN MC Workflow Project Risk Saved Search

ID

customsearch2636

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 *
Inactive	is false
Status	is In Progress

5. Development – Create the Workflow Action Script



5. Development – Create the Workflow Action Script

- ▲ Navigate to Customization>Scripting>Scripts>New
 - Note worked with my Dev team to create the following workflow action script
 - Can see extract from short script

Script

[Edit](#) [Back](#) [Deploy Script](#) [Actions](#)

TYPE
Workflow Action

NAME
SN WFA Search Prompt & Update Record

ID
customscript_sn_wfa_search_prompt

API VERSION
2.1

[Scripts](#) [Parameters](#) [Unhandled Errors](#) [Execution Log](#) [Deployments](#) [System Notes](#)

SCRIPT FILE
preview sn_wfa_search_prompt.js [download](#) [Edit](#)

ACTION FUNCTION

Custom Plug-In Types

CUSTOM PLUG-IN TYPE
No records to show.

File

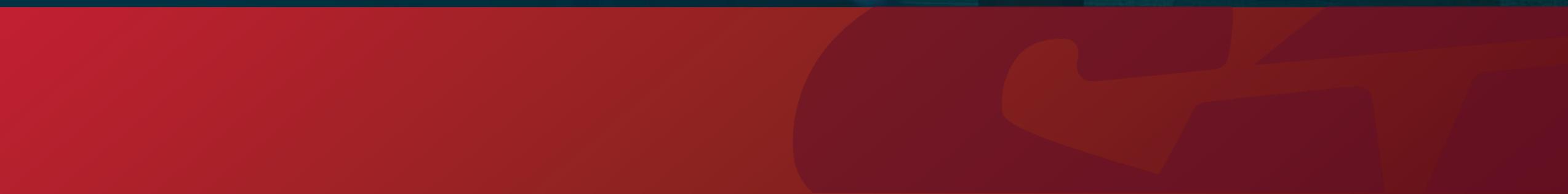
sn_wfa_search_prompt.js

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

CONTENT

```
1 /**
2  * @NApiVersion 2.1
3  * @NScriptType WorkflowActionScript
4  */
5 define(['N/search', 'N/llm', 'N/runtime'],
6
7  (search, llm, runtime) => {
8
9  const onAction = (context) => {
10     const paramSearch = runtime.getCurrentScript().getParameter({ name: 'custscript_saved_search' });
11     const paramPromptId = runtime.getCurrentScript().getParameter({ name: 'custscript_prompt_id' });
12
13     const rec = context.newRecord;
```

6. Configuration – Create the Workflow



6. Configuration – Create the Workflow

- ▲ Navigate to Customization>Workflows>New

Save Cancel

Basic Information

RECORD TYPE *
Project

SUB TYPES

NAME *
SN MC Project Risk Check

ID
_sn_mc_project_risk_check

DESCRIPTION

OWNER
Dean Carazza

EXECUTE AS ADMIN

RELEASE STATUS
Testing

KEEP INSTANCE AND HISTORY
Only When Testing

ENABLE LOGGING

INACTIVE

Initiation

EVENT BASED SCHEDULED

Schedule

SAVED SEARCH FILTER *
SN MC Workflow Pro... Risk Saved Search

REPEAT

EXECUTION DATE *
11/20/2025

EXECUTION TIME *
12:00 am

- ▲ Save

6. Configuration – Create the Workflow - Continued

- ▲ Double click into the state to rename to AI Project Risk Agent

The screenshot shows the 'Workflow: SN MC Project Risk Check' workspace. On the left, a workflow diagram has a state box labeled 'State 1' between 'START' and 'END' nodes. A red arrow points from 'State 1' to the 'Workflow State' configuration panel on the right. The panel has tabs for 'Save', 'Cancel', 'Change ID', and 'Actions'. The 'NAME' field is highlighted with 'AI Project Risk Agent'. The 'ID' is 'workflowstate179'. There are checkboxes for 'DO NOT EXIT WORKFLOW' (unchecked) and 'START STATE' (checked). Below are tabs for 'Actions', 'Transitions', 'Fields', and 'Translation'. A table with columns 'ID', 'NAME', 'PARAMETERS', 'TRIGGER ON', 'EVENT TYPES', 'CONTEXTS', 'CONDITION', 'FORMULA', and 'SAVED SEARCH CONDITION' is shown with 'No records to show.'

The screenshot shows the same workflow workspace. The state box in the diagram is now labeled 'AI Project Risk Agent' between the 'START' and 'END' nodes. A red arrow points from this state box back to the configuration panel in the previous screenshot, indicating the result of the renaming action.

6. Configuration – Create the Workflow - Continued

- ▲ Now that we have named our state, we can start adding our actions
 - First we will add our workflow action script which we can see added or available within the list of actions

New Action
TYPE
3Way Check Subs Match Field WS (Custom)
Add Button
Celigo Realtime Export (Custom)
Confirm
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
SN WFA Search Prompt & Update Record (Custom)
Send Campaign Email

6. Configuration – Create the Workflow - Continued

- ▲ The script calls for two parameters so it knows which AI Prompt to use and which Saved search to use to feed into the prompt

Parameters

STORE RESULT IN

FIELD	VALUE
Prompt ID	
Saved Search	<Type then tab>

- ▲ To get the Prompt ID go to your prompt and copy/paste the Script ID Value

Prompt

Edit Copy Back Delete System Notes Download XML

Basic Prompt Settings

INACTIVE

NAME

SN MC Project Risk

SCRIPT ID

custprompt9

Template

PREAMBLE

TEMPLATE

You are an expert project risk analyst. You will be given detailed data points

Your task is to determine whether the project is currently AT RISK or NOT AT

Carefully analyze the provided information to decide if there are any signs of

- ▲ Select the AI Prompt Saved Search from the dropdown for the Saved Search Parameter Field

Parameters

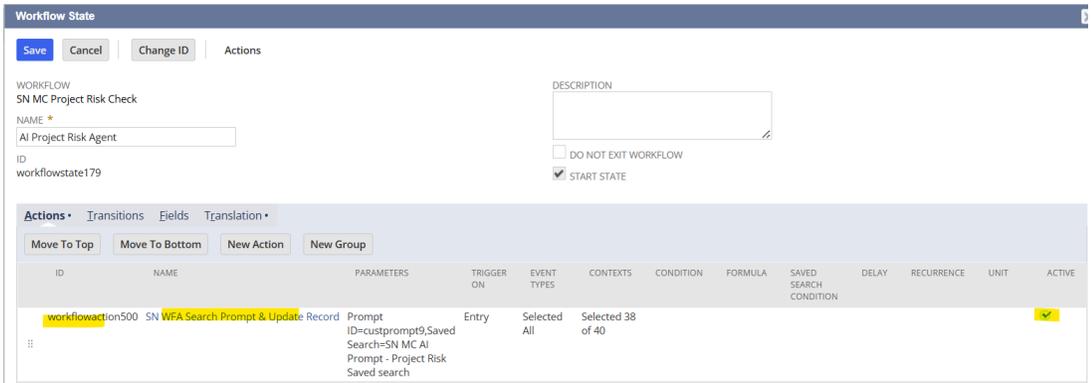
STORE RESULT IN

FIELD	VALUE	JOIN
Prompt ID	custprompt9	
Saved Search	SN MC AI Prompt - Project Risk!	

Save Cancel

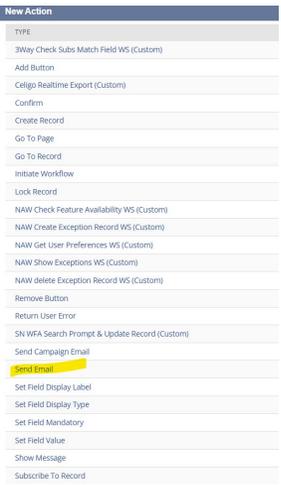
6. Configuration – Create the Workflow - Continued

▲ Can see the Workflow Action Script has been added



▲ Can add our next action which is to send an email to the Project Manager of the Project to alert them if their project has been flagged at risk

- Hit New Action>Send Email



6. Configuration – Create the Workflow - Continued

▲ Set the following fields

▼ Parameters

Sender

SPECIFIC SENDER
SENDER
<Type then tab>

FROM FIELD
RECORD (JOIN FIELD)
Current Record

FIELD *
Job Manager

Recipient

SPECIFIC RECIPIENT
RECIPIENT
<Type then tab>

FREE FORM ADDRESS
EMAIL

FROM FIELD
RECORD (JOIN FIELD)
Current Record

FIELD *
Job Manager

CC
dcarazza@scalenorth.com

BCC

Content

USE TEMPLATE
TEMPLATE *
SN MC Project At Risk

CUSTOM
SUBJECT

BODY

INCLUDE VIEW RECORD LINK

Attachment

FILE
<Type then tab>

FROM FIELD
RECORD (JOIN FIELD)
Current Record

FIELD

6. Configuration – Create the Workflow - Continued

- ▲ Add the Following Condition of when to send the email

Workflow Action

Save Cancel

Basic Information

WORKFLOW
SN MC Project Risk Check

STATE
AI Project Risk Agent

TYPE
Send Email

ID

INSERT BEFORE

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

Open

SAVED SEARCH CONDITION

Workflow Condition

Save Cancel

USE EXPRESSIONS

RECORD	FIELD *	COMPARE TYPE
Old Record	Project At Risk	not checked
	Project At Risk	checked

6. Configuration – Create the Workflow - Continued

▲ Now that we have added both our states we can save

Workflow State

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

WORKFLOW
SN MC Project Risk Check

NAME *
AI Project Risk Agent

Dean Carazza
Dean Carazza

DESCRIPTION

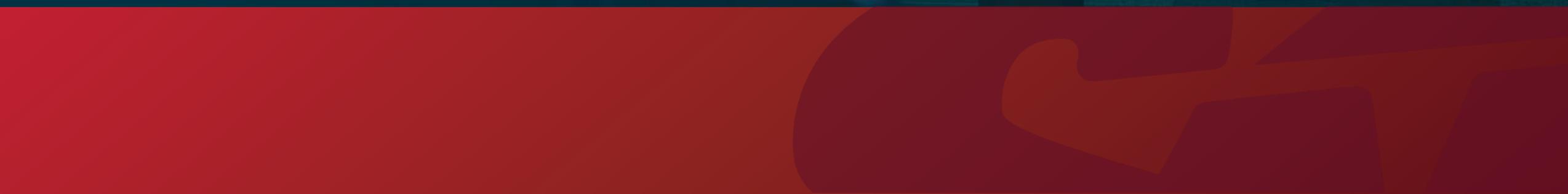
DO NOT EXIT WORKFLOW
 START STATE

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	RECCURENCE	UNIT	ACTIVE
workflowaction500	SN WFA Search Prompt & Update Record	Prompt ID=custprompt9,Saved Search=SN MC AI Prompt - Project Risk Saved search	Entry	Selected All	Selected 38 of 40							<input checked="" type="checkbox"/>
workflowaction501	Send Email	To: Job Manager, Template: SN MC Project At Risk	Entry	Selected All	Selected 38 of 40	Old Record : Project At Risk = F And Project At Risk = T						<input checked="" type="checkbox"/>

7. Testing



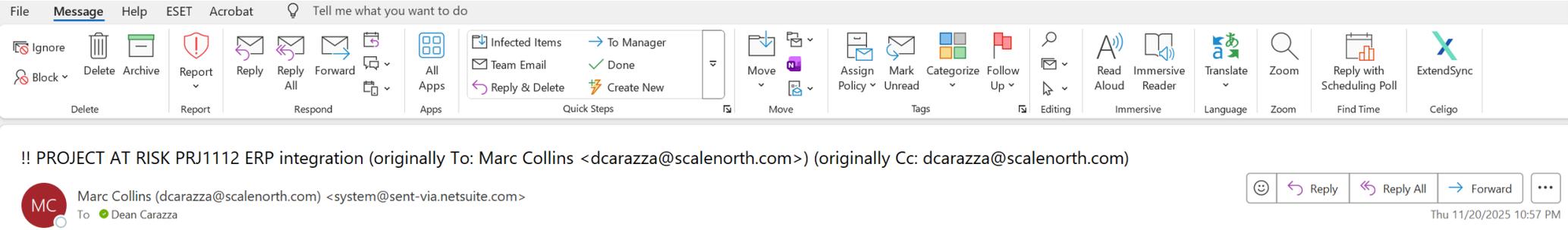
7. Testing

- ▲ Now that we have completed our functional and configuration steps, we can proceed to testing our solution.
- ▲ Went to our Workflow Project Risk Saved Search and unchecked and cleared the project risk notes for two projects so can test to see if updates again when running
- ▲ To test our solution we can edit our workflow and try running on demand by hitting the execute now button

The screenshot displays the Oracle NetSuite interface for configuring a workflow. The top navigation bar includes 'ORACLE NetSuite', a search bar, and user information for 'Dean Carazza'. The main menu shows various application areas, with 'Customization' selected. The central workspace is titled 'Workflow: SN MC Project Risk Check' and features a 'Workspace' panel on the left with a '+ New State' button and a workflow diagram showing a 'START' node leading to an 'AI Project Risk Agent' step, which then leads to an 'END' node. The main configuration area is divided into 'Basic Information' and 'Actions' sections. The 'Basic Information' section includes fields for 'NAME' (SN MC Project Risk Check), 'ID' (customworkflow_sn_mc_project_risk_check), 'RECORD TYPE' (Project), 'DESCRIPTION', 'OWNER' (Dean Carazza), and a checked 'EXECUTE AS ADMIN' option. The 'Actions' section contains buttons for 'Save', 'Cancel', 'Change ID', 'Execute now', and 'Actions'. On the right side, a 'Summary' panel provides a quick overview of the workflow's state, including 'Record Type' (Project), 'Inactive' status, and 'Release Status' (Testing).

7. Testing

- Should get email of project flagged at risk. Can view link from email.



- Can show system notes

- Project At Risk Was set to No/False manually in UI then workflow ran and updated and stored the response

The screenshot shows a project management system interface. At the top, there's a "Classification" section with fields for Project Manager (Marc Collins), Project Department, Project Class, Project Location, and Language. A checkbox for "PROJECT AT RISK" is checked. Below this is a "System Notes" section with a table of changes. The table has columns for Date, Set By, Context, Type, Old Value, and New Value. The notes show a workflow update on 11/20/2025 where the "Project At Risk" status was changed from True (T) to False (F) by Dean Carazza via the UI.

DATE	SET BY	CONTEXT	TYPE	OLD VALUE	NEW VALUE
11/21/2025 3:06 pm	-System-	Scheduled Workflow	Set		T
11/20/2025 10:57 pm	-System-	Scheduled Workflow	Change	F	T
11/20/2025 10:56 pm	Dean Carazza	UI	Change	T	F

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 **11/21/25 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>



NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

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