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SuiteFlow: *Visually Orchestrate your Business Processes*

Course Description

With SuiteFlow, you have the tools to visually construct your business processes:

- SuiteFlow can automate your approval routing needs, from simple single-approver processes to those with multiple sequential approvers and parallel approvals.
- SuiteFlow is much more than approval processing alone. It can be used to support a variety of form-level processing such as setting field defaults, field-level validations, form-level validations, and changing field display characteristics.
- SuiteFlow supports creating related records, sending emails, creating complex business rules with formulas, processing-service level agreements, supporting drip-marketing/lead nurturing, extension through SuiteScript, and more.

In this three-day course, you examine the key features of SuiteFlow as well as more in-depth capabilities to support complex use cases. A focal point of using SuiteFlow is centered on best practices, including incorporation of modular software development principles.

Through interactive teaching and hands-on exercises, you learn how to design and construct your automated business processes. Each new concept comes with a foundational exercise, and is then expanded to more complex use cases with one or more optional/take-home exercises.

Who Should Attend

- NetSuite administrators, business analysts, and software developers responsible for designing, creating and maintaining business processes built using SuiteFlow

Prerequisites

- SuiteFlow is a point-and-click development tool. Having the aptitude to easily use the following NetSuite point-and-click tools should give you the ability to create a foundational set of workflows:
  - Aptitude for building complex saved search criteria with expressions
  - Aptitude for creating custom fields
  - Aptitude for customizing forms
- The following concepts and experiences will better equip you to building out workflows that support complex use cases:
  - Logic concepts in software development: if-then-else, looping
  - Experience with business process mapping
- Course participants should be familiar with NetSuite navigation and features.
  - To learn how to navigate NetSuite and perform common tasks, take the Getting Started training available in SuiteAnswers

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Hardware Requirements

- Adobe Flash Player must be installed in your browser. The SuiteFlow tool comes with a point-and-click diagramming component that requires Flash.

Key Tasks

How do I:

- Default data into forms in the user interface?
- Dynamically change the display characteristics of fields, such as hiding them or making them enterable?
- Validate my data entry?
- Automatically create tasks, phone calls, support cases, and other records while performing other functions?
- Set up an approval process with one approver, multiple sequential approvers, or parallel approvers?
- Configure service-level agreements, such as sending out reminder notifications and/or transferring assignees/approvers to other people?
- Affect my business process on one record based on changes occurring in related records?
- Design my workflows using best practices to reduce complexity, support reuse, and enable ease of maintenance?

Related Courses

Take these courses for more training:

- SuiteScript
    - SuiteFlow can be extended with SuiteScript and SuiteScript can initiate/trigger workflows.
- SuiteTalk
    - Workflows can be initiated/triggered through SuiteTalk integration.

SuiteAnswers

Get answers to your support and training related questions:

- Go to the Learning Center to find related self-paced training videos
- Take New Feature Training to learn about the latest NetSuite release

Live Training Webinars

Participate in monthly, free Webinars to get practical tips and tricks for using NetSuite better:

- Go to netsuite.com to register for an event: Services > SuiteTraining > Training Webinar Series

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Course Objectives and Topics

This course introduces the features and functions of SuiteFlow while taking you through the creation of a number of differing business processes. By the end of this course, you will have created a full-featured business process that incorporates approval processing, as well as automations while loading a record, filling out a form, and submitting a form.

Day 1 Agenda

Automate Business Processes: Identify business processes; discuss how business processes might be implemented in SuiteFlow; define basic building blocks of SuiteFlow, such as states, transitions, actions, and triggers.

Add Business Rules on Data Entry: Define business rules on a variety of trigger points in the user interface, such as when a form first loads into the user's browser, field level validation, and validation of data upon clicking Save; build a workflow that implements business rules while an end user is entering data on a form, including hiding/showing fields and having it wait until related data is sourced in.

Take Actions Upon Record Load: Change how data is to be displayed while loading a record into the browser, such as setting field defaults for new forms and changing field display characteristics. Differentiate based on whether you are viewing, editing, copying, or printing a record.

Server-side Transitions and Triggers: Investigate transition and trigger points in detail, with particular emphasis on their configuration for workflows that process after record submittal.

Take Actions upon Record Submittal: Create related records; send email notifications including generation of dynamic email body text; navigate the end user to another location in NetSuite; validate data after record submittal. Investigate the workflow execution log, and use as a means of troubleshooting your workflows. Advanced: use a custom workflow action to update data on a related record.

Day 2 Agenda

Incorporate Approval Processing: Add approval processing with single approvals; incorporate a step-based approach to building and testing approval workflows; add custom buttons to your form such as Approve and Reject; create fields to manage approval status and current approver; send email notifications; keep a form from being edited and/or hide buttons and fields while a record is waiting to be approved. Investigate other uses of custom buttons. Mimic real-life use cases by logging in as users with differing roles.

Define Multiple Approvals: Add complexity to your approval use cases when necessary using one of several workflow patterns: using multiple states to represent other approvers, using a single-state to represent multiple approvers connected via a supervisor hierarchy; using a special design to support parallel approvers (i.e. two or more approvers that must each approve, but can approve at the same time). Continue logging in as a variety of users with differing roles.

Modularize with Sub-Workflows: Use sub-workflows to incorporate modular design principles: reduce complexity, support reuse, lower maintenance cost. Use sub-workflows to sequence the execution of one or more workflows and to support parallel processing. Copy workflows.

Transition on Related Records: Influence the state of a workflow based on changes to any related records. For example; change the state of a customer workflow based on completion of a related task.

Day 3 Agenda

Enter Scheduled Actions and Transitions: Incorporate service-level agreements to drive your approval processes through to completion: send out reminder emails; change priority of tasks, support cases, and other records; escalate to other approvers and assignees; automatically reject approvers if applicable. Create workflows to support your lead nurturing and drip-marketing needs: send campaign emails based on lead response (e.g. open email, click-through link, non-activity).

Apply Searches to Actions and Transitions: Support conditional actions and transitions that would otherwise not cause the workflow to be triggered. Use searches to build conditions on sublist data. Advanced: use a custom workflow action to extend what searches can do with sublists by returning sublist data to a workflow.

Specify Complex Business Rules: Build SQL and SuiteScript formulas into conditions at workflow initiation, transition points, and actions; use formulas to set values into fields.

Review and Next Steps: Review SuiteFlow best practices; design a set of workflows to support a customized vendor bill approval process, given a set of requirements; additional resources

Scheduled Workflows and Mass Updates (optional, time-permitting): Compare scheduled workflows, mass update, and scheduled SuiteScript. Create a mass update process for workflows; clicking buttons via mass update; differentiating when workflows are executed (e.g. mass update or user interface) via workflow execution context.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite account.