SuiteFlow: Workflow Fundamentals

Key Tasks

How do I:

- Default data on my forms?
- Add field and form level validations while performing data entry?
- Dynamically change form data based on data entry?
- Differentiate display of data based on whether a form is displaying in edit mode, view mode, or print mode?
- Send email notifications?
- Automate the creation of tasks, phone calls and other records?
- Automatically move an end user to a different page/record within NetSuite?
- Generate approval routing workflows with several approvers?
- Process approval buttons such as Approve and Reject?
- Manage approval status?
- Support role-based business processes?

Course Description

With fundamental workflow concepts, you have the tools to visually construct your business processes. SuiteFlow can automate your custom approval routing, apply validations, send emails, create related records, direct the end user to appropriate forms in the user interface, and more. In this two-day course, you'll examine these key foundational features of SuiteFlow, including best practices around building custom business processes.

Who Should Attend

- NetSuite administrators, business analysts and software developers who need an introduction to SuiteFlow and the automated workflows that can be created and configured in NetSuite.
- Software developers, who already have experience creating workflows using a majority of the skills covered in the Workflow Fundamentals course, should consider taking the Advanced Workflows course to enhance their capabilities.

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

Related Courses

- SuiteFlow: Advanced Workflows
  - Advanced Workflows assumes fundamental knowledge of SuiteFlow, and then drills deeper into the full power of workflows with a software developer oriented focus.
- SuiteScript: Extend NetSuite with JavaScript
  - SuiteFlow can be extended with SuiteScript and SuiteScript can initiate/ trigger workflows.
- SuiteTalk: Integrate Your Applications
  - 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.

Hardware Requirements

Adobe Flash Player must be installed in your browser in order to work with the point-and-click diagramming component that is part of SuiteFlow. It is possible to build workflows without this, but is not optimal. Course instruction and materials are based on having access to the diagramming component.

Course Objectives

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.

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.

Client versus Server Execution: Learn which SuiteFlow actions execute in the browser (Client) and which execute on the back-end (Server).

Live Training Webinars

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

- Go to suitetraining.com > Webinars and Events to view the schedule and register for an event.

Day 2 Agenda

Incorporate Approval Processing: Add simple 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 intermediate complexity to your approval use cases when necessary: use multiple states to represent other approvers; use a single-state to represent multiple approvers connected via a supervisor hierarchy. Continue logging in as a variety of users with differing roles.

Review and Next Steps: Review SuiteFlow best practices; identify additional capabilities of SuiteFlow; review additional resources.

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.