

# SuiteFlow: Advanced Workflows

## Key Tasks

### How do I:

- Incorporate modular design principles in my workflows?
- Generate approval routing workflows with sequential and parallel approvals?
- Create entire business processes that run in parallel?
- Use custom buttons for more than approval processing?
- Configure service-level agreements via use of scheduled actions and transitions?
- Support a drip marketing campaign?
- Alter the state of a workflow based on changes to related records?
- Conditionally transition workflows and execute actions based on sublist data?
- Embed SQL and SuiteScript formulas to define complex business rules?
- Integrate custom actions developed in SuiteScript into my workflows to extend their functionality?
- Take advantage of scheduled workflows and workflow mass updates?
- Support versioning of workflows within a single workflow definition?
- Take advantage of workflows via my SuiteTalk applications and my SuiteScripts?

## Course Description

With advanced SuiteFlow concepts, you have the tools to support advanced approval routing use cases including sequential and parallel approvals, incorporation of sub-workflows, altering your workflow based on other records, addition of service-level agreements, extension through formulas and SuiteScript and more. In this two-day course, you'll examine more in-depth features of SuiteFlow to bring power to advanced use cases. Best practices remain a focus, just as in Workflow Fundamentals.

Through interactive teaching and hands-on exercises, you'll 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

- Software developers and consultants who are already comfortable creating business process flows and need to enhance their skills for more complex workflows.
- This course is geared towards a technically savvy audience. NetSuite users with less technical aptitude should consider taking the Workflow Fundamentals course first.

## Prerequisites

You should be comfortable with a majority of the skills presented in the Workflow Fundamentals course:

- Creating basic approval processes (e.g. single approver that can approve & reject)
- Sending emails
- Creating records
- Solid experience using the Visual Builder to set up conditions
- Setting default values on forms and performing validations
- Effective knowledge of Workflow Triggers and their usage

## Related Courses

- 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.

The following concepts and experiences will better equip you to building out workflows that support the complex use cases covered in this course:

- Exposure to programming concepts
- Logic concepts in software development: if-then-else, looping
- Modular software development principles
- Experience with business process mapping

## 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 takes you beyond the fundamentals of workflow development to inspect all capabilities of SuiteFlow. By the end of this course, you will have extended a baseline business process with parallel processing, service-level agreements, conditional execution based on sublist data, enhanced automation capabilities through SQL formulas, extension with custom actions, transition based on changes to related records, modularization of your workflows and more.

## Day 1 Agenda

**Design and Troubleshoot Workflows:** Design workflows in a modular fashion; troubleshoot issues in an existing set of workflows; review the base set of workflows that are extended throughout the course; identify fundamental workflow concepts; gain a better understanding of trigger and transition configuration.

**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, no activity).

## Live Training Webinars

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

- Go to [suitetraining.com](http://suitetraining.com) > Webinars and Events to view the schedule and register for an event.

**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. Use searches to upgrade workflows without adverse consequences.

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

**Use SuiteScript with Workflows:** Build SuiteScript formulas into conditions at workflow initiation, transition points and actions. Extend workflows with custom actions (developed in SuiteScript).

## Day 2 Agenda

**Execute Workflows in Different Contexts:** Gain an understanding of the consequences and use cases surrounding the execution of workflows via other workflows, SuiteScripts, and SuiteTalk. Set up workflow mass updates. Create scheduled workflows. Differentiate between workflow mass updates, scheduled workflows, and scheduled SuiteScripts.

**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. Use sub-workflows to support parallel processing and parallel approvals.

**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.

**Add Complexity to Approval Processing:** Identify alternative design pattern to support parallel approvals (not using sub-workflows). Determine how complex approval use cases can be implemented with SuiteFlow.

**Review and Next Steps:** Review SuiteFlow best practices; design a set of workflows to support a customized purchase order approval process, given a set of requirements; 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.