SuiteFlow: Workflow Fundamentals

Business Process Heroes Wanted!

Course Description

SuiteFlow puts the power of business process automation in the hands of those who understand business processes the most … you! Are you ready to be a business process hero?

This SuiteFlow: Workflow Fundamentals course will provide participants with the foundational knowledge and skills necessary to build efficient business processes using SuiteFlow—NetSuite's point-and-click business process automation tool. Using SuiteFlow, administrators and business analysts are able to build and manage their business process workflows without writing a single line of code or understanding complex programming jargon.

This intermediate-level course examines key features and best practices for building custom workflows, such as performing form-level data validations, sending notification emails, creating related records, automating approval routing and more.

If you can visualize it, you can build it using SuiteFlow. Who's the hero now?

Key Tasks
How do I:

- Default data on forms and dynamically change form data during data entry?

- Add field and form-level data validations?

- Control the display of form data based on whether a form is in edit, view or print mode?

- Send email notifications and automate the creation of tasks, phone calls and other records?

- Automatically direct an end user to a different page/record within NetSuite?

- Troubleshoot workflow execution using the Workflow Execution Log?

- Generate approval routing workflows with multiple approvers?

- Manipulate sublist line fields on Transaction records using Sublist Action Groups?

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Who Should Attend

This course is designed for NetSuite administrators, business analysts and other non-technical users looking for an introduction to the basic functionality of SuiteFlow.

Prerequisites

Course participants should be familiar with NetSuite navigation, general administration tasks and defining Saved Search criteria using expressions.

Course Goal

The goal of this course is to provide you with the foundational knowledge you need to effectively create and manage business process workflows through an applied understanding of the key terminologies, concepts, tasks and best practices associated with the development of workflows using SuiteFlow.

By working through a series of hands-on exercises, you will create a full-featured business process that incorporates field and form-level validations, email notifications, joins on related records, custom approval routing, and directing users to other forms and records in the NetSuite user interface.

Agenda

SuiteFlow Overview: Learn about the foundational concepts and terminologies associated with business processes. You will be introduced to SuiteFlow workflow components, such as states, transitions, actions and triggers, as well as the Workflow Manager.

Related Courses
Take these courses for more training:
- SuiteFlow: Advanced Workflows
- SuiteAnalytics: Reports and Searches

Understanding Client Triggers: Provides an overview of workflow triggers, which represent specific events that occur during the processing of a record in NetSuite. The focus of this module is on client triggers, which represent events that occur during client-side action execution in the user's web browser.

Configuring Actions on Data Entry: Configure business rules on a variety of client-side events in the user interface, such as when a record form is first loaded into the browser. Perform field level validations while an end user is entering data on a form, including setting field value defaults, hiding and showing fields, making fields mandatory or optional, and sourcing data from related records.

Understanding Server Triggers: Continuing our discussion of workflow triggers, this module focuses on server triggers, which represent events that occur on the NetSuite server during server-side workflow execution.

Learn about the workflow execution model, which defines the order in which all triggers occur during workflow processing.

Configuring Actions on Record Load: Configure business rules that change how form data is displayed while loading a record into the browser, such as setting field defaults for new records and changing field display characteristics based on whether you are viewing, editing, copying or printing a record.

Troubleshooting Workflow Execution: When things don't work as expected, turn to the Workflow Execution Log to pinpoint exactly where your workflow is failing. You'll learn how to use Active Workflows, Workflow History and the Workflow Execution Log to troubleshoot workflow processing by examining state transitions, the execution order of actions and the associated triggers.

Configuring Actions on Record Submit: Configure business rules that execute during record save, such as creating related records, sending email notifications, navigating users to other records or pages in NetSuite, and performing form-level data validations during record submittal.

Building Approval Workflows: By incorporating a step-based approach to building and testing approval workflows, you will learn how to add simple approval-based processing with single approvers. Add custom buttons to your forms, such as Approve and Reject, send email notifications, create fields to manage approval statuses and track current approvers, and lock records while waiting for approval.

SuiteAnswers
Get answers to your support and training related questions:

- Go to Videos to find Getting Started tutorials.
- View New Feature Previews to learn about the latest NetSuite release.

Learn how to create more advanced approval processing workflows that route approvals up the supervisor hierarchy using a looping construct that checks for additional approvers.

Updating Record Sublist Lines: Learn how to access record sublist data via workflow using Sublist Action Groups, which allow you to configure actions that are executed on sublist line fields in select record sublists.

Improving Workflow Performance: Provides useful tips and best practices to improve overall workflow processing performance. Areas discussed include workflow design and execution, constructing appropriate conditions, processing workflows and actions at After Record Submit, and workflow logging.