NetSuite Workflows Beginner's Guide

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Take control of your business processes with NetSuite Workflows. One of my favorite areas in NetSuite is the workflow engine, often referred to as SuiteFlow. If you haven't created a workflow to manage an internal business process, you are missing out on some powerful business tools.

Workflows bring your specific business processes into the NetSuite system. Stop using manual processes. With NetSuite, you can build a custom business process tailored to your unique company needs inside your NetSuite account. Workflows allow for a point and click graphical interface with no suitescript required; in other words, any one on your staff members could help create this process in your system.

SuiteFlow is a great ERP tool to have, because it can also help automate an approval process on a transaction or record. This action allows for a seamless flow to happen, from one stage of approval to another. It can also validate information and direct certain users to follow an appropriate flow or internal process.

For example, a simple workflow could be defaulting a field on a form, or hiding a field if a particular user role views those records. A more complex workflow can involve multiple stages, transitions, and actions. Once the workflow is implemented, NetSuite keeps track of every stage in a workflow on a workflow log of the record. The workflow essentially lives within the record, to better aid in your own audit trail of each stage, transition, and decision that ultimately helped you arrive at the current state.

How to Start a NetSuite Workflow:

Once the feature is enabled in your environment, you will find NetSuite workflows under **Customization->Scripting->Workflows**. The best way to learn how to create a workflow is by physically creating a workflow to test. If you need more help than what's described below, there are NetSuite documentation and tips to help with some deeper knowledge gathering and education. Start with a workflow template.

NetSuite includes the following 3 workflow templates:
• Journal Entry Basic Approval
• Purchase Order Basic Approval
• Sales Order Basic Approval

(Use these NetSuite templates as a guide in help to customize the workflow to fit your business and industry.)

Professional
workflow tip

Don't have the standard workflow define how your business flow should work. This is the real beauty of NetSuite. This cloud-based ERP system can be customized to fit your unique business needs, in every aspect. Play with the workflow until it suits your needs.

Get familiar with the following:

- Workflow Context

- Record types and subrecords for creation of a workflow

- Event versus scheduled workflows

- Trigger types

- Event types

- Context types

- Building conditions using the visual builder or linking a saved search as criteria
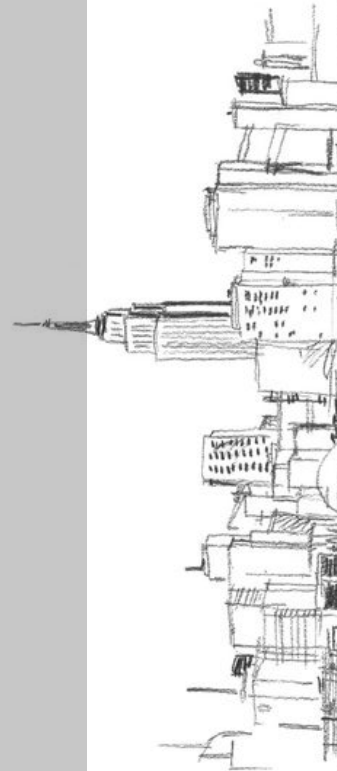
WORKFLOW STATES:

These are the building blocks of workflows. A state corresponds to a stage or step in a business process. States include specific actions, and are connected to other states by transitions.

WORKFLOW TRANSITIONS:

Transitions allow for movement between states (steps) of your business process. You can define conditions and trigger condition options for the most accurate process possible.

WORKFLOW ACTIONS:

Create actions that will allow a state (steps) to execute a command. For example: send an email, add a button, remove a button, set a field value, go to record, return user error.

WORKFLOW FIELDS:

Fields work similar to other fields you would add to a record, although they live within the workflow. You can add NetSuite fields to the entire workflow or just to a particular state.

NetSuite Workflow Requirements

1. You must spend time with the business process owners who will use the process. These dedicated owners will have the best understanding of the business flow. Start brainstorming and building out the requirements within the team. Once you've finished collaborating, merge the gap between the business requirements and the workflow functionality within NetSuite.

2. You need to understand the inherent limitations within workflows, in order to build the best solution for your company. **Utilize the help of a NetSuite partner to help build out ideas of business flows.** Any good consultant will have multiple strategies, ideas and know the most efficient way to create the workflow. A meeting with a NetSuite partner could save countless days of work for you.

3. Once you know what you need, take your requirements and starting building out a NetSuite workflow. Create states, transitions, and actions to accommodate your business requirements. Test your workflow against the business requirements. Involve the users in the process, and be open to suggestions of others ways to improve the workflow process. Multiple iterations of changes are not uncommon, so remember to be patient until the flow seems perfect.

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Things to know about NetSuite Workflows:

Workflows are centered around a record. This can be pro and a con for NetSuite clients. Each record will have its own workflow instance that you can track for progress, and review the log. However, you are not able to jump between records inside a workflow. It is possible to use the 'go to record' action to send the user to another record, although another workflow would have to be set up on the other record.

Sublists are not available in a workflow. You can only manipulate and touch body fields of a record. However, there are some ways of using saved searches, which you can set up as a condition of a workflow state or transition. The saved search functionality can use the sublist values to define criteria for your business process.

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