



# SUITEFLOW: WORKFLOW FUNDAMENTALS

## Course Description

### Business Process Heroes Wanted!

Are you a NetSuite administrator or business analyst looking to streamline your organization's business processes, but don't know where to start? Are software developers often called to save the day by building and managing the very business processes that you own?

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?

The two-day **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.

## Key Objectives

Through real-world use cases and hands-on exercises, you will learn how to:

- Add field and form-level validations during data entry.
- Dynamically change form data during data entry.
- Control the display of form data based on whether a form is in edit, view or print mode.
- Send email notifications.
- Automate the creation of tasks, phone calls and other records.
- Automatically direct an end user to a different page/record within NetSuite.
- Manage approval statuses.
- Configure multiple approvers based on supervisor hierarchy.

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?

### 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.

To learn more about NetSuite navigation and performing common administrative tasks, view the Getting Started training videos available on SuiteAnswers, or register for the five-day **NetSuite Essentials** course.

### Course Goal

This course introduces the features and functions of SuiteFlow, while taking you through the creation of a number of differing business processes. By working through a series of hands-on exercises, you will learn how to create full-featured business processes that incorporate field and form-level validations, email notifications, joins on related records, custom approval routing, and direct users to other forms and records in the NetSuite user interface.

### Related Courses

Take these courses for more training:

- SuiteAnalytics: Reports and Searches
- SuiteCloud: Exploring the NetSuite Platform

## Day 1 Agenda

**Understanding the Case Study:** Review the business requirements of the fictional furniture company, SuiteDreams, and the specific workflows that will be built during the course using SuiteFlow. Through a series of hands-on exercises, participants will implement these business requirements using a modularized approach to workflow development.

**SuiteFlow Foundations:** 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 Diagrammer/Manager.

**Workflow Triggers:** Learn about workflow events by understanding the various workflow triggers used to execute actions and transitions at various states of a workflow. Learn about the execution sequence of these triggers and the importance of trigger context when determining when a workflow should be initiated and when actions and transitions should be executed.

**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.

## Day 2 Agenda

**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.

**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.

**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.

**Incorporating Approval Processing:** By incorporating a step-based approach to building and testing approval workflows, you

### SuiteAnswers

Get answers to your support and training related questions:

- Go to Training Videos for free self-paced training.
- Take New Feature Training to learn about the latest NetSuite release.

### 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.

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.

**Configuring Multiple Approvers:** 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.

**Course Review & Wrap Up:** Review course objectives and the additional NetSuite training resources available.

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.

