Tracking Serial Numbers and Recurring Subscriptions in NetSuite

Problem:

Serial Numbers are not searchable in NetSuite Global Search, and there is a need to track subscription expiration dates on individual serial number orders.

Proposed Solution:

Create new Entity Fields:

1. “Recurring Subscription Contact” – Checkbox applied to Contact Record

Create new searches:

1. Contact search for contacts marked “Recurring Subscription Contact” with Customer as available filter to be used in sublist on Recurring Subscription record, make public

Create custom record “Item/Serial Number” with the following fields

1. Serial Number – Globally searchable – Linked to Inventory Number
2. Item – Linked to Item Record
3. Customer (Sold To) – Linked to Customer Record
4. Latest Item Receipt – Linked to Latest Item Receipt Transaction Record
5. Latest Item Fulfillment – Linked to Latest Item Fulfillment Transaction Record
6. Latest Invoice/Cash Sale – Same as above
7. Latest Return Authorization – Same as above

Subtabs: Cases, Transaction History

1. Create new CRM field attached to Case record for Serial Number/Item record, record as parent, show on Cases subtab
2. Create new transaction search with Available filter: ‘Inventory Detail: Number’, attach to Transaction History subtab on Serial Number/Item record sublists using Serial Number as the Filter field.

Create custom record “Recurring Subscription” with the following fields

1. Sale Date
2. Expiration Date
3. Invoice – Linked to Invoice Transaction Record
4. Customer – Linked to Customer Record
5. Sublist of Item/Serial Number Records that were sold and expire on same date
6. Sublist of Customer Contacts marked as the Subscription Contact

Create scripts:

1. Client script to disable and Auto Generate Name field
   1. Item/Serial Number Record - {serialnumber} – {itemnumber}
   2. Recurring Subscription Record – {customer}-{saledate}
2. User event script to create Item/Serial Number record on item receipt
   1. aftersubmit – Loop thru line items to find serialized items; create S/N record

This solution would make individual serial numbers globally searchable, and will link to the Recurring Subscription for that serial number.