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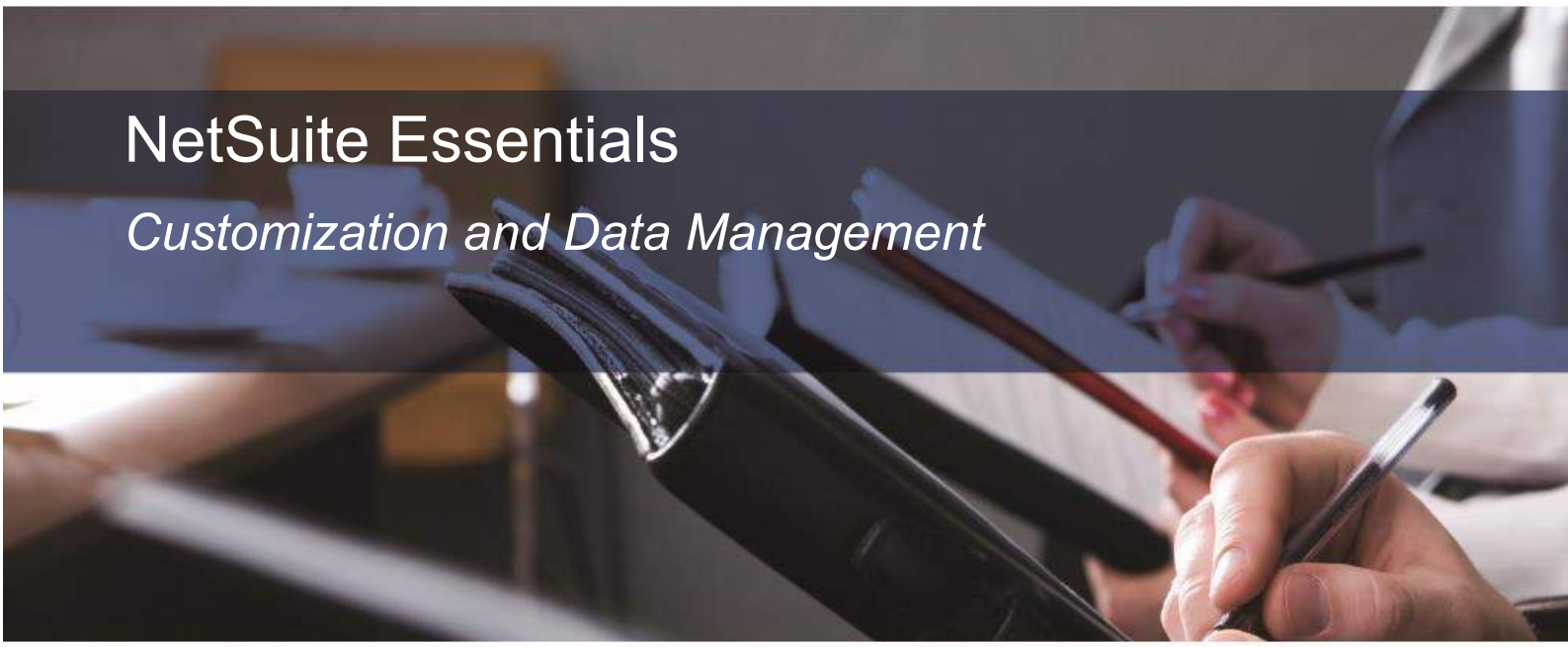

NetSuite Essentials

Customization and Data Management

NETSUITE | SuiteTraining

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Getting Started: Recap and Review

About this Module

Review Day 1: Getting Started:

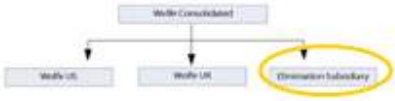
- NetSuite Fits Your Business
- OneWorld Overview
- Implementation Project
- Navigation
- Company Preferences
- NetSuite Data Model
- Roles, Permissions and Users

Relational Database within NetSuite

Benefits of a relational database:

- Incorporates many unique tables
- Defines tables with rows or unique lines of information
- Relates tables together to form another table, for example a transaction
- Displaces 4 pieces of information for 1
- Provides a richer and more efficient use of data storage resources
- Results in a more functional and significantly richer dataset for information delivery

OneWorld Overview



OneWorld allows domestic and international companies to manage multiple legal entities in a single NetSuite Account.

The legal entities are organized as a tree with one root company at its root:

- One subsidiary created for each separate reporting legal entity
  - NetSuite supports 124 subsidiaries and 1 root (parent)
- Subsidiary configuration includes: multiple currencies, taxation rules, and reporting needs
  - Country, chosen on the subsidiary record, determines NetSuite edition
- Offers consolidated reporting with foreign currency translation

Elimination Subsidiary: Create for each parent subsidiary to eliminate revenue or expense at the consolidated level:

- Only journal entries post to elimination subsidiaries
- Not included in Subsidiary license fees
- Not counted in the maximum of 125 subsidiaries

Navigation

The first step is signing in to NetSuite and then you:

- Authenticate your credentials using security questions
- Access the center associated with your role
- Work with transactions and lists
- Use forms to create or access records; the data is stored in specific record types
- Take advantage of various search options
- Use online help resources

Set Up Company: Information & Features

As the Administrator, you use the **Setup Manager** for the following items:

- Company Information and enter your company name and other relevant information – **Setup > Company > Company Information**
- Enable feature to start tailoring NetSuite to your business requirements - **Setup > Company > Enable Features** and review the various subtabs
    - Available features are determined by your NetSuite subscription
    - Access Related SuiteApps from various subtabs, refer to help topics
    - Functional groupings live on the subtabs

Naming and Numbering

NetSuite allows changing out-of-the-box terminology and numbering to be changed to meet your needs:

- Go to **Setup > Company > Rename Records/Transactions**
  - Change the default names, in NetSuite, to familiar terminology, for example:
- Go to **Setup > Company – Auto Generated Numbers to** define the numbering schemes for your different records

Set Company Preferences

The administrator can define company-wide preferences:

- Preferences at **Setup > Company > General Preferences** can supersede individual user preferences
- Set company-wide printing / and fax service at **Setup > Company > Printing & Fax**
- Set company-wide email preferences at **Setup > Company > Email Preference**

NetSuite Data Model

The following tables support the four (4) standard record types:

- **Entity:** people and organizations that you do business with
  - For example: leads, prospects, customers, contacts, employees …
- **Transaction:** represent a financial exchange or value adjustment
  - For example: Sales orders, bank deposits, inventory adjustments …
- **CRM:** activities with customers
- **Item:** goods and services you buy and sell; line items on sales and purchase order forms
- **Custom**: addresses unique needs of your business
  - Use Case: NetSuite Training Services uses a custom record for our course evaluations

NetSuite Classifications

NetSuite Classifications can help you track various financial, transactional, and employee records and therefore useful for reporting:

- **Departments:** Designate transactions' owner and resources as part of internal team
- **Classes:** For wider categorization within your business (Business Unit)
- **Locations:** Recognize physical or virtual places

Use classifications can also be used to restrict a user's access to system information.

Roles and Permissions

A User has one or more roles; each role defines access to data:

- A **user** is anybody with access to your NetSuite account: employee, customer, partner, or vendor
- The role is defined by:
  - Set of **Permissions**
  - **Levels** of each permission
  - Role **Restrictions**

Review Questions

See if you can answer the following questions; fill in the bank or use true/false values:

1. True or False: NetSuite's data structure incorporates many unique tables

2. NetSuite OneWorld allows you to set up multiple Legal entities, in one NetSuite account, using subsidiaries

3. A form is used to enter or view existing data

4. The record is how data is stored in NetSuite

5. The Set Up Manager provides links to configure NetSuite

6. True or False: Company-wide preferences may be set, such as "Email, Printing & Fax Preferences" True

7. Name the 4 standard NetSuite data (record) types:
   Entity Transactionas CRM Items

8. True or False: Classifications can be useful for segmenting data (reporting) True

9. A User is anybody with access to your NetSuite account

10. A role is a set of Permissions governing a user's access to data

11.

Customization: Create Subtabs, Lists, and Fields

About this Module

Chatham Company has specific requirements for a customer profile:

- What do I do if this requirement cannot be met by standard NetSuite?
- What are the customization options in NetSuite?
- Which tools can I use to help me meet this requirement?

Objectives

1. Describe customization options in NetSuite
2. Identify SuiteBuilder capabilities
3. List the preferred order for creating custom elements
4. Create subtabs and apply to existing records
5. Create custom lists and define the order of the listed values
6. Identify common field types and common uses
7. Describe customization considerations

NetSuite Customization Options

The **SuiteCloud** features provide us with ways to add customized elements and functionality to our NetSuite Account:

- We will focus on **SuiteBuilde**r in this class
  - Add fields and lists to pages, while customizing the look of those pages
- We offer technical courses in:
  - **SuiteScript:** Automate and create web pages, run batch updates to your data, and work with SuiteFlow
  - **SuiteBundler**: Package and deploy customizations, work with SuiteApps or Bundles
  - **SuiteTalk:** Communicate with NetSuite via Web Services

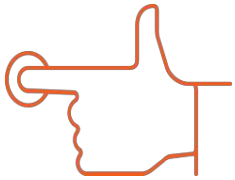
Beyond basic customization and not part of this class - SuiteScript:

- SuiteScript is a JavaScript-based API that gives developers the ability to extend NetSuite beyond the capabilities provided through SuiteBuilder point-and-click customization.
- Many NetSuite forms, records, customization objects and their event/trigger points are accessible through SuiteScript. What you decide to do with SuiteScript depends on which part of NetSuite you are trying to extend, search, or process**.**

Here is a chart with additional information:

Tool	Function	Description
SuiteBuilder	User Interface Customization	A set of point-and-click tools that allows users to easily customize NetSuite by adding custom fields, custom lists, custom record types, and custom forms.
SuiteScript	Scripting	An extension of the JavaScript APIs that gives developers the ability to extend NetSuite to automate business processes or to build applications on top of NetSuite.
SuiteBundler	Vertical Solution Deployment	Allows vertical solutions to be quickly and easily deployed to multiple NetSuite accounts.
SuiteTalk	Web Services Integration	Exposes NetSuite as a web service to simplify integration with legacy systems and third party vertical applications. SuiteTalk relies on industry standards, such as SOAP and XML, for data communication with external hosts.

SuiteBuilder Overview

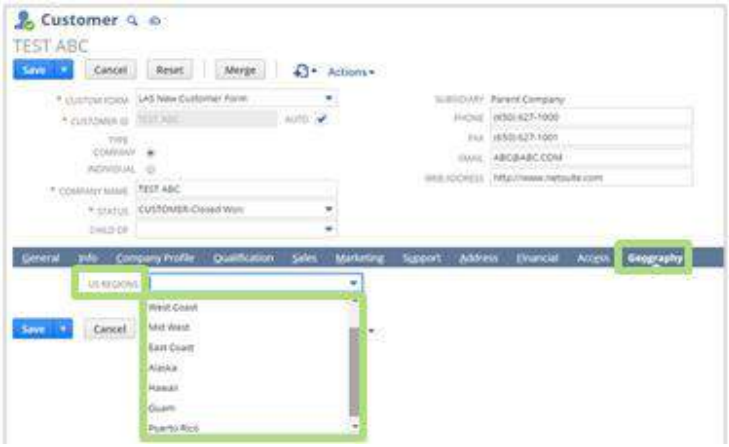


Point-and-click tool:
Easily tailor the look of NetSuite to meet your business needs:

- **Point and Click** functionality
- **Custom Fields:** on Entity, CRM, Item and Transaction records
- **Custom Lists:** Set up predefined choices (list of values) in custom fields
- **Subtabs:** Assign custom fields to custom sub tabs
- **Custom Forms**: Entry, Transaction, PDF Layout, HTML Layout
    - Create custom forms:
        - Create the layout for printed and emailed forms
        - Define preferred entry form for a user role

User Interface Elements

Use Case:
Chatham Company, per their BRD, wants to capture company profile information for their customers, organize the information and NetSuite does not have the necessary fields:

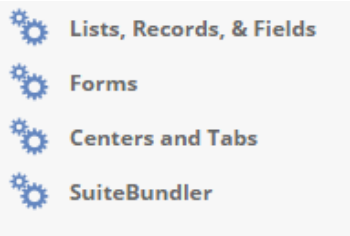


- Create a new **Subtab** “Company Profile”
- Create **Custom Lists** of values to be available for a user to select from
    - “Industry”
    - “Annual Revenue”
- Create the **Custom Fields** for our custom lists to live in. e.g. Industry Type
- **Customize** the Standard Customer **Form** to manage the final display of fields and subtabs

Order of creation is dictated by where the information lives:

	Characteristics/Function	Options
1. Subtabs	• Optional, but useful to organize a lot of fields within a form (page)	• Belong to a Record
2. Lists	• Standardize available choices	• Single • Multiple
3. Fields	• Contain data, perform calculations • Sourcing and filtering data from a record (auto populate) • Validation and defaulting values	• Belong to an Entity or Transaction • Many varieties and functions
4. Forms	• Organize fields and subtabs on a page • Limit user access to data	• Chain together to create workflow
5. Record Types	• Creates tables in database • Used in One-to-Many scenarios	• Free-standing or attached to another record • Nested lists or Dependent Dropdowns *(2 fields where the 2nd dynamically refers to the choice in the first)*
6. Centers and Tabs	• Organize links and permissions	• Custom or Standard centers

Customization Menu



Most of the tools reside in the Customization menu:

- Navigate to **Setup > Customization**
  - **> Lists, Records, and Fields:**
    - Specific fields
    - **Other Custom Fields**, such as Subsidiary record customization
  - **> Forms**
    - Subtabs, forms, layouts
  - **> Centers and Tabs** – please refer to help topics
  - **> SuiteBundler** – please refer to help topics
- Many of the customization records, once viewed, are then available in recent records menu

Customization Considerations

Plan and **design** before you act:

- What is unique to my business and is not native in NetSuite?
- How does the customization fit into business processes?
- How will customization impact reporting?
- How does the data need to be organized?
- What are the relationships between the data?
- Who needs access to this data and do I need to restrict access?
- Have we discussed with stakeholders, to reach a consensus?
- Not everyone should have customization permissions!

Field Types

Here are some of the commonly-used custom fields; refer to Help and SuiteAnswers for all custom fields types:

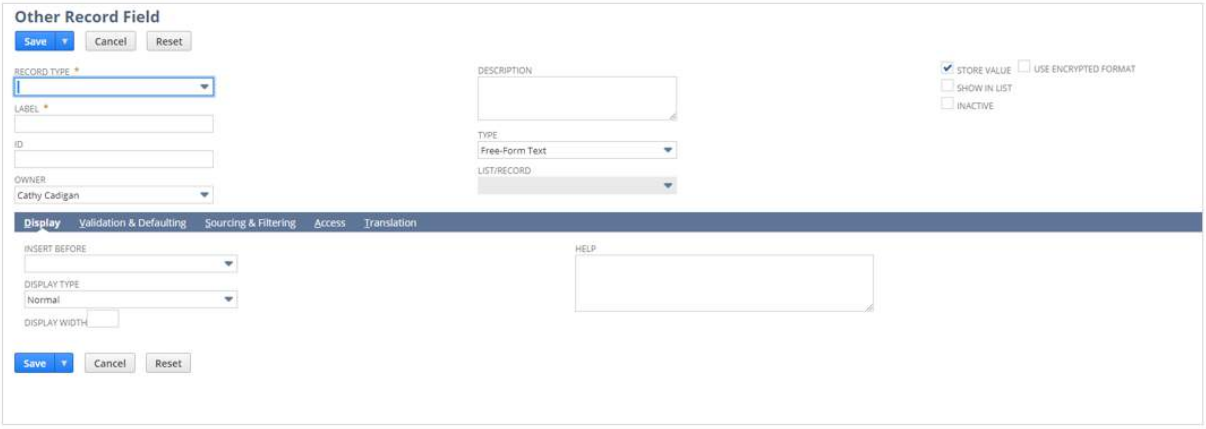
- **Check Box:** True/False, Yes/No, or On/Off statements
- **Date:** Display as a date and display the calendar icon
- **Decimal Number:** Enter number with a decimal point
- **Free-Form Text**: Enter short text (up to 300 characters)
- **Hyperlink**: Link to a Web page
- **List/Record**: Reference a list of values or point to a record
- **Percent:** Display a numeric value as a percent

Custom fields can be placed in the header (main) part of a form or a line level.

Other Record Fields

Other Record Fields are used for records that do not have custom forms associated with them and can be added, to gather information specific to your business needs, to various record types:

- Go to **Customization > Lists, Records, & Fields > Other Record Fields**



Please refer to SuiteAnswers for a complete list of the record types.

Walkthrough: Create a Subtab for an Entity

Use Case/Scenario:

- I need to add geographic information to a customer record, on its own subtab

Create a Subtab for an Entity

Use Case: Display a Geography subtab on a customer record:

- Subtabs can be added to any record in NetSuite and are used to organize custom fields on your transaction, entity, CRM and item records
- Create custom subtabs first and then assign any custom fields to the custom subtabs.
- Create custom child-subtabs by defining an existing subtab as the parent subtab.
    - Allows defining an additional layer of information for your subtab categories.
- Custom subtabs display on the record after a field is assigned to the subtab

- Go to **Customization > Forms > Subtabs**

- Select the correct record type such as:
  - **Transaction**: Used for cash refund, cash sale, credit memo, estimate, invoice, opportunity, purchase order, return authorization and sales order transaction records.
  - **Entity**: Used for customer, project, vendor, employee, other name, contact, partner and group records.
  - **Item**: Used for inventory, non-inventory, group, other charge, assembly/bill of materials, kit/package and service item records
  - **CRM**: Used for task, phone call, event, case, campaign and solution records

Create a Custom List and List/Record Field

Create a Custom List

Create an Entity List/Record Field

Tips: Correcting an Entity List/Record Field

View a Customer Record

Use Case/Scenario: Track a customer headquarters' location to a global region:

- I want users to select a single region from a list
- Create a new custom field that uses my custom list
- View a customer record to ensure that my subtab, list and field are all visible

Create a Custom List

Use Case: Give users a list of **Global regions** to select one value for the location of the customer's headquarters:

- Go to **Customization > Lists, Records, & Fields > Lists > New**

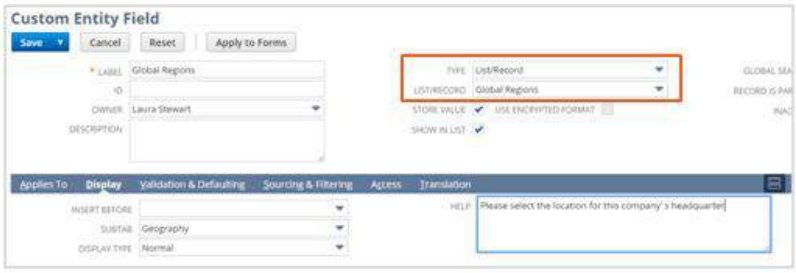
- Enter a **Name** for the list, e.g. Global Regions
- Define **Show Options** in, select one of the following
  - **the order entered**

- **alphabetical order**

Create an Entity List/Record Field

Use Case: Provide users a field where they **select a single value** from a list of **Global regions:**

- Go to **Customization > Lists, Records, & Fields > Entity Fields > New**



In the **top of the form**, enter the field name in the **Label** field

- NetSuite assigns an **Internal ID** to the custom field and which will be visible when viewing a list of custom fields. (Note: Go to Home > Set Preference and on the General subtab, in Defaults choose “Show Internal IDs)
- Enter the field **ID** to easily identify the location and purpose of the custom field; can be used by java scripting:
  - This must begin with an underscore ‘_’ , e.g. ID: _global_regions
- Select the **Type** of field you are creating; the value you select determines the other options you can set
  - If you select List/Record or Multiple Select, you must then select the list or record in the List/Record field that contains the items for the list field.
- Review the field definitions for the following and select per your business needs:
  - **Store Value:**
    - If the field displays the result of a formula, do NOT store the value
    - **Tip!** Select Store Value if you want to use this field for duplicate detection criteria
  - Show In List
  - Global Search
  - Record is Parent

Go to the **Applies To** subtab, select the entity record(s) that will use the custom field(s)

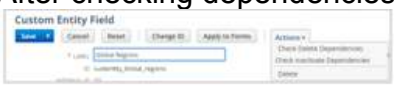
Navigate to the **Display** subtab and select the placement of this field on transactions in relation to other custom fields and write help text:

- Select the subtab for the field to display
- Select the type of display you want this field to have:
  - **Normal**: This field can be edited. Use with custom code calculations, defaulting and sourcing information
  - **Disabled**: Useful for custom code, users can not enter information
  - **Inline Text**: information cannot be entered, the field is for informational purposes only
  - **Hidden**: Does not display on the record, but can be searched on. The information in the field is a result of a calculation or maybe a custom code
- Enter the **Help** text definition. What you enter will display when users click on the field name 'help' hyperlink.

Tips: Correcting a Custom Field

If you entered information incorrectly, and saved the field, here are some actions you can take:

- Use the Actions menu items to Check Delete Dependencies or Check inactive Dependences
  - After checking dependencies, you can choose **Delete** or,



  - Mark **Inactive**

  - If you entered the ID incorrectly, you can select the **Change ID** and enter a new ID

View a Customer Record

Once a field has been assigned to the custom subtab, the subtab is visible for viewing.
Go to **Lists > Relationships > Customers**

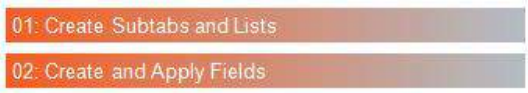
- Click the **View** link for an existing customer
- The new **Subtab,** e.g. **Geography,** is now available on a customer record:
- The new **Custom Field**, e.g. **"Global Regions"**, is available
- The new **Custom List** provides our dropdown list of values, for example:
  - APAC
  - EMEA
  - No Amer
  - So Amer
  - Other
- Note that we see "-New-" in our role, which has customization permissions

Activity: Entity Customization Review

Can you answer the following questions?

- Which field type provides a yes or no, true or false value?
- What must be created first, to organize my data on a form?
- What can provide a defined choice of values and cut down on data entry errors?
- True or False: Help should be written for the new custom field

Now It's Your Turn



Use Case/Scenario:

- Your company wants to capture customer information around the customer's type of industry and annual revenue
- You need to organize this data, provide a list of values and create the new fields
- Allow 8-15 minutes

Exercise 01: Create Subtabs and Lists

Time: 3-5 minutes

Scenario: You Company wants to capture information about each customer's profile; to be stored on the Customer Record.

As the administrator, in this exercise:

- Create a custom subtab, to organize the custom fields to be created
- Create two (2) custom lists to identify: Type of Industry and Annual Revenue

Create Subtab

1. Go to **Customization > Forms > Subtabs**.
2. Click the **Entity** subtab.
3. Enter **Company Profile** in the Title field.
4. Click **Add.**
5. Click **Save** when you are done.

Create Custom Lists for Industry and Annual Revenue

6. Go to **Customization > Lists, Records, & Fields > Lists > New**.
    a. Name: **Industry**
    b. Owner: (leave as is)
    c. Description: You can leave this blank. But, the recommended best practice is to enter a description, such as why this field is needed and who requested it
    d. Show options in: **alphabetical order**
    e. Inactive: (leave blank)
7. **Enter** and **add** the following in the Value column (**click Add after each item**).
    It is important that values are entered exactly as noted here (no spaces around the hyphens!):
    a. **Financial Services**
    b. **Retail**
    c. **Education**
    d. **Government**
    e. **Computer Software**

f. **Computer Hardware**

g. **Advertising Media**

8 Click **Save & New** when you are done.

9 Enter the following information (click Add after each item):

a. Name: **Annual Revenue**

b. Owner: (leave as is)

c. Description: You can leave this blank. But, the recommended best practice is to enter a description, such as why this field is needed and who requested it.

d. Show options in: **the order entered**

e. Inactive: (leave blank)

10 Enter the following in the **Value** column (click **Add** after each item):

a. Less than $6M

b. $6-$100M

c. **More than $100M**

11 Hover over Save & New and click **Save** when you are done.

12 The **Custom Lists** page displays. You should see the two (2) lists you created:

a. Annual Revenue

b. Industry

13 **End.**

Exercise 02: Create and Apply Fields

Time: 7-10 minutes

Scenario: Custom lists (Industry and annual revenue) were created for the Company Profile subtab.

In this exercise:

- Update your **User Preferences to Show Internal IDs**
- Create custom entity fields that use those custom lists
- Additionally, create a field for Year Established

Update User Preferences

1. Go to **Home > Set Preferences**
2. On the **General** subtab, go to the Defaults section and select Show Internal IDs
3. Click **Save**

Create Custom Entity Field - Industry

4. Go to **Lists > Relationships > Customers > New**.
5. You should be viewing a **Standard Customer Form**.
6. Go to the top-right hand side, from the **Customize** dropdown menu, select **New Field.**
7. You should be on the Custom Entity Field page.
8. Enter the following information:
    a. Label: **Industry** JJ industry
    b. ID: **_industrytype**
    c. Owner: (leave as is)
    d. Description: You can leave this blank. But, the recommended best practice is to enter a description, such as why this field is needed and who requested it.
    e. Type: **List/Record**
    f. List/Record: **Industry**
    g. Store Value: **check**
    h. Show in List: **check**
9. (The system defaults to Customer.) Verify that **Customer is checked** in the **Applies To** subtab (and other records where you want to see this field).

10 Click the **Display** subtab and enter the following information:

a. Insert before: **(leave blank)**

b. Subtab: **Company Profile**

c. Display Type: **Normal**

d. Help: Type in the following text into the Help field. "**Select the value that most clearly identifies the customer."**

e. **Tip:** Copy the above sentence in NetSuite, and then you can paste it into the other help areas for the additional custom fields in NetSuite

11 Do not do anything on the Validation & Defaulting, Sourcing & Filtering, Access, or Translation subtabs.

12 Hover over Save & New and click Save & New when you are done. You should be on the Custom Entity field page.

Create Custom Entity Field – Annual Revenue

13 Enter the following information:

a. Label: **Annual Revenue** Annual Revenue AR

b. ID: **_annualrevenue**

c. Owner: (leave as is)

d. Description: (leave blank)

e. Type: **List/Record**

f. List/Record: **Annual Revenue**

g. Store Value: **check**

h. Show in List: **check**

14 Check **Customer** in the **Applies To** subtab (and other records where you want to see this field).

15 Click the **Display** subtab and enter the following information:

a. Insert before: (leave blank)

b. Subtab: **Company Profile**

c. Display Type: **Normal**

d. Help: Type or paste in the following text into the Help field. **"Select the value that most clearly identifies the customer."**

14 Do not do anything on the Validation & Defaulting, Sourcing & Filtering, Access, or Translation subtabs.

15 Click Save & New when you are done.

Create Custom Entity Field – Year Established

16 Enter the following information:

a. Label: **Year Established**

b. ID: **_yearestablished**

c. Owner: (leave as is)

d. Description: (leave blank)

e. Type: **Integer Number**

f. List/Record: (grayed out)

g. Store Value: **check**

h. Show in List: **check**

17 Check **Custome**r in the **Applies To** subtab (and other records to see this field).

18 Click the **Display** subtab and enter the following information:

a. Insert before: **(leave blank)**

b. Subtab: **Company Profile**

c. Display Type: **Normal**

d. Apply Formatting**: Uncheck** the box if it is checked. We do not want number formatting applied to the year.

e. Help: **Type in the following text into the Help field. "**Enter the year this company began doing business."

19 Do not do anything on the Validation & Defaulting, Sourcing & Filtering, Access, or Translation subtabs

20 Hover over Save & New and click **Save** when you are done.

21 The **Custom Entity Fields** page displays.

22 Review the Internal ID, type, list and tab. You should see the three (3) custom fields that you created:

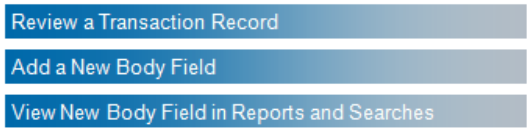
a. Industry

b. Annual Revenue

c. Year Established

23 . **End.**

Walkthrough: Review a Transaction Record and Add New Body Field



Use Case/Scenario:

- My company needs to show if accounting has approved a sales order
- We just want a simple check box
- The field should be placed at the top of the form
- It should be available in reports and searches

Review a Transaction Record and Select Customize

For example, go to **Transactions > Sales > Enter Sales Orders** and choose from the **Customize** dropdown list:

- **New Body Field**: top of the form
- **New Column Field**: line-level information
- **New Option Field:** line-level information

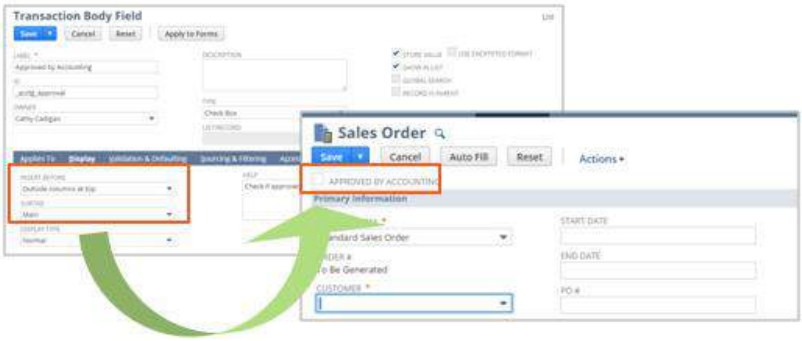
***Recommended**: Start from the transaction record, such as a new sales order, and use the **Customize** dropdown list.*

Use Case: display check box for Accounting Approval on sales transactions.

- Use the **Customize** dropdown list and select **New Body Field**:

New Body Field: Check Box for Accounting Approval

Create and define a **Check Box** field:



- **Name:** Accounting approval
- Optional: Enter the field Label, ID (must begin with an underscore '_'), etc.
- **Type:** Check Box
- Check **Store Value** and **Show in List** to facilitate searches and list displays
- **Applies to**: select which transactions that you want the field (s) applied, e.g. Sales Order
- **Display**: define the following:
  - **Subtab**: Main, so it is not on a subtab or line
  - **Display Type:** Normal – the user interacts with the field
  - **Help:** "Check if approved by accounting"

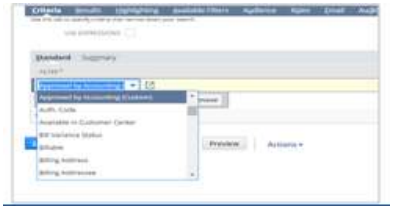
Note: Use these same steps to create a **New Column field** or **New Item Option field** for transactions.

Available in Reports and Searches

The new custom field is immediately available:

- Sales by Customer reports

- Transaction saved search



Consider Additional Field Features

Navigate to the **Validation & Defaulting** subtab:

- Be aware that it may be wiser to apply constraints on a custom form and not at the field level:
- Example: Make a field mandatory on a custom form, not on the field itself

Defaults are values you specify for your custom fields:

- Enter a **Default Value**; If the field is not locked, the value may be changed
- Build formulas by clicking on the icon and using the pop-up window
    - If you are using a formula, never store the value of the custom field
- Select a search with summary results, to be used to calculate a value for this custom field.

Navigate to the **Sourcing & Filtering** subtab:

- Auto-populate a custom field by **sourcing** information from another record and a field on that record
- Ensure that you have the most current information

- Reduce data entry errors
- For example: Display the Customer Contact and their Phone Number at the top of a transaction
    - A custom field to link to customer record and display contact name
    - A custom field to populate the phone number from the contact information

Now It's Your Turn

03: Custom Transaction Field – Validation & Defaulting

04: Custom Transaction Field – Sourcing & Filtering

05: Custom Transaction Field – Sourcing & Filtering

Use Case/Scenario:

- Display a deposit percentage and deposit due on a sales order
- Populate a sales order with the customer contact's name and phone number
- Populate a purchase order with the weight of an item
- Allow 10 - 20 minutes

Exercise 03: Custom Transaction Fields – Validation and Defaulting

Time: 5-10 minutes

Scenario: Chatham Company has a requirement for Sales Order transactions:

- Automatic calculation of percent deposit required from the customer based on the total amount of the transaction multiplied by a percentage

In this exercise:

- Create a field to enter in the % Deposit Required
- Create a field to calculate the Deposit Due

Create a Transaction Body Field for Percent Deposit Required

1. Go to **Transactions > Sales > Enter Sales Orders**. You should be viewing a Standard Sales Order form.
2. Go to the top-right hand side of the form and select **New Body Field** from the **Customize** dropdown.
3. You should be on the **Transaction Body Field** page.
4. Enter the following information:
    a. Label: **Deposit Percent**
    b. ID: **_dep_percent**
    c. Owner: (leave as is)
    d. Description: You can leave this blank. But, the recommended best practice is to enter a description, such as why this field is needed and who requested it.
    e. Type: **Percent** – Think about how the information should be displayed.
    f. List/Record: (greyed out)
    g. Store Value: **check**
    h. Show in List: (leave blank)
5. Check Sale in the Applies To subtab (and other transactions as required)
6. Click the Display subtab and enter the following information:
    a. Insert before: **(leave blank)**
    b. Subtab: **Main**

c. Display Type: **Normal**

d. Help: Type in the following text into the Help field**. "Enter the required deposit percentage**."

7 Do not do anything on the Validation & Defaulting, Sourcing & Filtering, Access, or Translation subtabs.

8 Hover over Save and click Save & New when you are done. Note the message. Confirmation Transaction Body field successfully Saved

Create a Transaction Body Field to Calculate the Deposit Due

9 You should be on the Transaction Body Field page.

10 Enter the following information:

a. Label: **Deposit Due**

b. ID: **_dep_formula**

c. Owner: (leave as is)

d. Description: You can leave this blank. But, the recommended best practice is to enter a description, such as why this field is needed and who requested it.

e. Type: **Currency**. We choose currency, because the result of the formula calculation needs to be displayed in currency format

f. List/Record: (greyed out)

g. Store Value: **(leave blank)** - When creating a formula field, calculations are dynamic so we do NOT want to store the value – will create an error.

h. Show in List: (leave blank)

11 Check Sale in the Applies To subtab (and other transactions where you want to see this field).

12 Click the Display subtab and enter in the following information:

a. Insert before: **(leave blank)**

b. Subtab: M**ain**

c. Display Type: **Inline Text -** The system will populate this field, so we do not want the user interacting with the field.

d. Help: Type in the following text into the Help field**.** "**Displays the calculated deposit amount**."

13 Click the Validation & Defaulting subtab.

14 Click in the **Default Value** field, click the **Set Formula** icon

15 In the pop-up window, to the following:

a. Click the **Field** dropdown and select **Deposit Percent**

b. In the Formula Field, the following value should display: {custbody_dep_percent}

16 In the Formula field, now add the multiplication operator " * " {custbody_dep_percent}*

17 Go back to the Field dropdown and select Total. The following formula should display as {custbody_dep_percent}*{total}

18 Click Set to close the pop-up window.

19 Review the formula in the **Default** Value field.

20 Do not do anything on the Sourcing & Filtering, Access or Translation subtabs.

21 Hover over Save & New and click **Save** when you are done. You should see the list of the two new Transaction Body fields and can review their Internal IDs and Type:

a. Deposit Percent

b. Deposit Due

Let's validate your work! Create a Sales Order transaction

22 Go to Transactions > Sales > Enter Sales Orders.

23 Select the customer: TEST ABC and Warehouse: MidWest

24 In Deposit Percent, enter 10. Deposit Due remains blank.

25 On the Items subtab select Printer Cables, from the dropdown list, and a Quantity of 10. Click through any pop-up window, it is okay if we do not have any inventory.

26 Click Add to add the printer cables to the order.

27 Click Save when you are done.

28 The **Deposit Due** field should display calculated amount.

29 End.

Exercise 04: Custom Transaction Fields – Sourcing & Filtering

Time: 5-10 minutes

Scenario: Chatham Company has the following requirement for the Sales Order transaction:

- Identify the primary contact and their phone number

In this exercise:

- Create Sales Order transaction fields: Contact Name, Contact Phone Number, Shipping Preference
- Source information from the Customer record to auto populates the Contact Name and Contact Phone Number on the Sales Order transaction.

Create a Transaction Body Field for Contact Name

1. Go to **Transactions > Sales > Enter Sales Orders**. You should be viewing a Standard Sales Order form.
2. Go to the top-right hand side; click the **New Body Field**, from the Customization choices.
3. You should be on the **Transaction Body Field** page. Enter the following information:
    a. Label: **Contact Name**
    b. ID: **_contactontrans**
    c. Owner: (leave as is)
    d. Description: You can leave this blank. But, the recommended best practice is to enter a description, such as why this field is needed and who requested it.
    e. Type: **List/Record**
    f. List/Record: **Contact**
    g. Store Value: **check**
    h. Show in List: (leave blank)
4. Check Sale in the Applies To subtab (and other transactions to view this field).
5. Click the Display subtab and enter the following information:
    a. Insert before: **(leave blank)**
    b. Subtab: **Main**
    c. Display Type: **Normal**
    d. Help: enter the following: "**Select the contact for this customer.**"

6. Click the **Sourcing & Filtering** subtab. Enter the following information to pull contact data from the customer record
    a. Source List: **Entity**
    b. Source From: **(leave blank)**
    c. Source Filter By: **Parent**
7. Do not do anything on the Validation & Defaulting, Access or Translation subtab.
8. Hover over Save and click Save & New when you are done.

Create a Transaction Body Field for Contact Phone Number

9. You should be on the **Transaction Body Field** page. Enter the following information:
    a. Label: **Contact Phone Number**
    b. ID: **_contactphonenumber**
    c. Owner: (leave as is)
    d. Description: You can leave this blank. But, the recommended best practice is to enter a description, such as why this field is needed and who requested it.
    e. Type: **Phone Number**
    f. List/Record: (greyed out)
    g. Store Value: **check**
    h. Show in List: (leave blank)
10. Check Sale in the Applies To subtab (and other transactions where you want to see this field).
11. Click the Display subtab and enter the following information:
    a. Insert before: **(leave blank)**
    b. Subtab: **Main**
    c. Display Type**: Inline text.**
    d. Help: enter the following text: "**This is the contact's phone number."**
12. Click the **Sourcing & Filtering** subtab. Enter the following information, to pull in or source in data from the contact record:
    a. Source List: **Contact Name**
    b. Source From: **Phone**

13 Do not do anything on the Validation & Defaulting, Access or Translation subtabs.

14 Hover over Save & New and click **Save** you are done. Note that these two new files are now included in the list of Transaction Body Fields. You now have a total of four (4) Transaction Body Fields:

#	DESCRIPTION	TYPE	LIST	TAB ▲	SOURCE	PURCHASE	SALE
1	Deposit Percent	Percent		Main			Y
2	Deposit Due	Currency		Main			Y
3	Contact Name	List/Record	Contact	Main			Y
4	Phone Number	Phone Number		Main	Phone		Y

a. Deposit Percent

b. Deposit Due

c. Contact Name

d. Contact Phone Number

Validate your work! Enter a new sales order but do NOT save

15 Navigate to Transactions > Sales > Enter Sales Orders

16 Customer - Select TEST ABC. This is the parent entity.

17 In the Classification section, select TEST ABC: Amy Andrews as the Contact Name

18 Contact Phone Number populates. Note that because we defined the field as inline text, that the number is displayed and cannot be edited.

19 Click Cancel, you do not need to save the order.

20 End.

Exercise 05: Custom Transaction Fields – Sourcing & Filtering

Time: 5-10 minutes

Scenario: Chatham Company wants to display each item's weight placed on a Purchase Order, which can be shared with the vendor. This information can be used for any shipping charges that they are incurred for purchasing these items.

In this exercise:

- Create a custom field and source in data

Create a Transaction Column Field for Item Weight

1. Go to **Transactions > Purchases > Enter Purchase Orders**
2. Select **New Column Field** from the Customize dropdown, top-right hand side.
3. You should be on the **Transaction Column Field** page. Enter the following information:
    a. Label: **Weight**
    b. ID: **_itemweight**
    c. Owner: **(leave as is**)
    d. Description: You can leave this blank. But, the recommended best practice is to enter a description, such as why this field is needed and who requested it.
    e. Type: **Decimal Number**
    f. List/Record: **(greyed out)**
    g. Store Value: **check**
4. Check **Purchase Item** in the **Applies To** subtab (and other transactions where you want to see this field).
5. Click the **Display** subtab. Enter the following information:
    a. Insert before: **(leave blank)**
    b. Display Type: **Disabled**
    c. Help: enter information the following text: "**This is the weight of the item, pulled from the item record."**
6. Click the **Sourcing & Filtering** subtab. We want to pull information from the item record by identifying the following:
    a. Source List: **Item**
    b. Source From: **Weight**

7 No action on the Validation & Defaulting, Access or Translation subtabs.

8 Click **Save** when you are done. Review the Transaction Column Fields page; you should have the one field.

#	DESCRIPTION ▲	INTERNAL ID	TYPE	LIST	SOURCE	EXPENSE	PURCHASE
1	Weight	11	Decimal Number		Weight		Y

9 Go to **Transactions > Purchases > Enter Purchase Orders**

10 Select the vendor: **TEST Widget Works**.

11 Click the **Items** subtab.

12 Select the **Printer Cables** from the Items dropdown list in the Items column.

13 Validate that Weight is displayed as a column, the weight of the item is displayed, and you should not be able to edit this value. You may need to use the horizontal scroll bar, to see the column.

14 Click **Cancel.**

15 **End.**

Custom Elements: Best Practices

- Identify what is unique to your business and what is needed to support business practices
- Assess whether the required functionality exists in NetSuite
- Plan and design before you act; limit who can add custom elements
- Work with stakeholders
- Consider how elements relate to each other
- Provide ease of data entry and prevention of data entry errors by choosing the best field type
- Enable **SuiteCloud > SuiteScript** feature and **User Preferences > General** subtab > **Show Internal IDs** to see the field names when field help is accessed
- ID Field naming convention: _ abbreviation_description
- Use the **Description** field to provide business reasons, who asked for it, notes for the backup Administrator

Recent Custom Fields Enhancements

- Enhanced Delete Behavior for Records Referenced by Custom Fields impacts the behavior of list/record and multiple select custom fields:
    - Problem: The list of values is populated by records of the list/record type set in the custom field definition. Because list/record and multiple select custom fields are dependent on these referenced records, deletion of these records can be problematic.
    - Example: A custom field called “Color” is dependent on the custom list “color”. Purple is deleted from the list; this impacts every record with a custom field value of “purple”
    - Previous handling: NetSuite handled the deletion of records referenced by list/record and multiple/select custom fields according to the type of the record to be deleted. This behavior could not be customized
    - Solution: Many enhancements have been made to better define the resulting deletion behavior.

- **Ability to Make Custom Fields Inactive**
  - Before this release, it was possible to remove a custom field from a specific record type, or to delete the field completely.
  - This version supports the ability to make a custom field inactive instead of deleting it.
  - A new Inactive check box now appears on each custom field record.
  - Also as part of this feature, a new “Show Inactives” option is available on all custom field list pages, including the list of custom fields on each custom record type’s Fields subtab.
  - By default, the “Show Inactives” option is disabled so that inactive custom fields are filtered out of lists.
  - When this option is enabled, the list displays both inactive and active custom fields, and each custom field in the list has an Inactive check box next to it.
  - You can check this box to make a custom field inactive, and clear this box to reactivate an inactive custom field.
  - When a custom field is made inactive, it no longer appears on any forms or reports and it is not returned by global search, just like a deleted field.

Please refer to SuiteAnswers for more information

Additional Resources

NetSuite Help Center: User Guides

- SuiteBuilder Guide
- Encrypting Custom Field Stored Values
- Customizing Delete Behavior for Records Referenced by Custom Fields
- SuiteCloud (Customization, Scripting, and Web Services)

- SuiteAnswers Learning Center: Training Videos
- New Feature Training: SuiteCloud
- Customization/Integration
- SuiteScript

NETSUITE | SuiteTraining

Create Custom Forms

About this Module

I have been reviewing the NetSuite standard forms and they are not exactly what my company needs:

- Can I modify existing forms to collect, organize, and store this data?
- Is it possible to change the printed look of a form, such as a sales order?
- Will a custom form help me to define who can see and use certain data?
- Will NetSuite let me link a custom transaction form to another transaction creating some sort of workflow?

Objectives

1. Define the function of forms
2. Describe customization capabilities in NetSuite
3. Create, customize and apply best practices to both Entry and Transaction forms
4. Assign a preferred form to a role
5. Create internal, print, and email versions of a Transaction form
6. Chain transaction forms to create a workflow

Forms: Types and Layouts

- **Custom Entry Forms** is used to enter information in the creation of entity records
- **Custom Transaction Forms** is used to enter and print transactions
- **Transaction Form Layouts** are custom layouts that allow you to customize the look and feel of the transaction forms that you may want to print of email to those you do business with:
    - These are also referred to as basic layouts, which we will work with in this course
- **Advanced PDF/HTML Templates** provide an alternate method, to basic layouts, for customizing printed and emailed records; support the production of either PDF or HTML output:
    - Require enabling additional features
    - For more details refer to Advanced PDF/HTML Templates in Help

Forms: Functionality

Forms control **user access** to viewing and entering information:

- Forms **can be customized** (define different versions)
- Forms **can be chained together** to create a **workflow**
- Forms **can be assigned to roles:**
    - This provides that last level of control on a role: **Control view** a user's view with an assigned, custom form for their role
- Forms can **attach script** for additional functionality

Customize Entry Forms: Overview

The entry form may be customized in the following, general ways:

- **Subtabs:** display, rename, change display order
- **Field Groups:** change display order, rename, remove, add
- **Fields** (standard and custom): can be re-used on multiple forms
- **Actions:** rename, hide or change the display
- **Sublists:** control sublists on the subtabs in a form
- **Quickview:** add, remove, or rearrange the fields in a QuickView
- **Roles:** make preferred for any **standard** or **custom** role

Review each of the form subtabs and their associated sublists

Walkthrough: Customize an Entry Form

Customize a Customer Form

Use Case/Scenario:

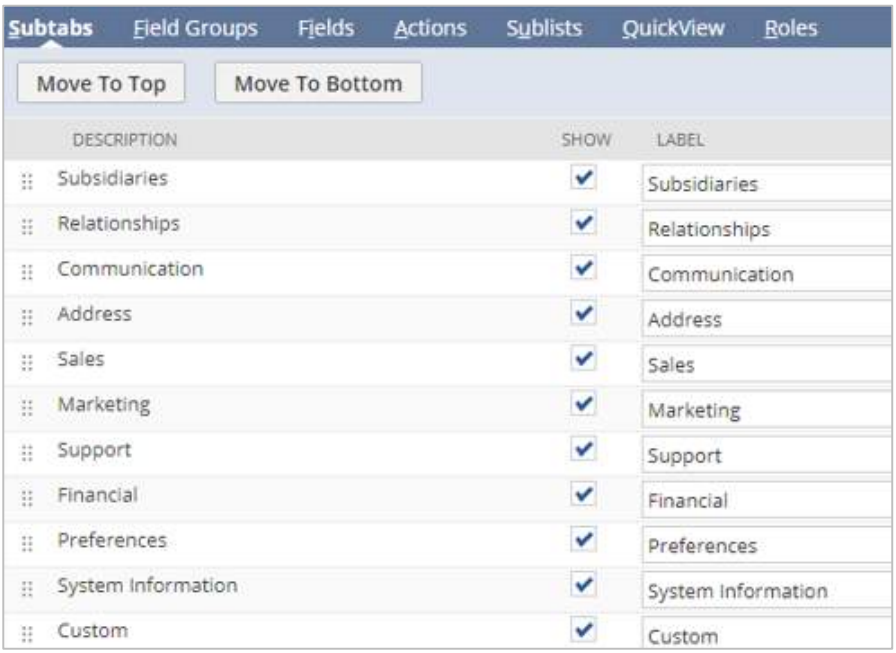
- We want sales reps to only see some of the subtabs on a customer form
- We will “hide” subtabs

Customize the Entry Form

Use Case: Hide the Marketing, Financial and Preferences subtabs from a sales rep

- Go to **Customization > Forms > Entry Forms** and click **Customize** for the **Standard Customer Form**

- Go to **Subtabs**, uncheck **Show** to hide desired subtabs



- Save and compare the standard and custom form

Now It's Your Turn

01: Customize Entry Form

02: Customize an Employee Form

Use Case/Scenario:

- Your company wants the Industry Type field marked as a mandatory field and show the subtabs in a different order.
- You want Resource or Project Managers to see some of the information from an employee record, hiding other information.
- Allow 10- 15 minutes

Exercise 01: Customize Entry Forms

Time: 5-8 minutes

Scenario: Chatham Company needs the Customer Form modified to better meet their needs. This will be the preferred form for a sales manager to use. We want to define field and subtab behavior.

In this exercise create a custom form and:

- Mark **Industry Type as a mandatory** field
- Position Company Profile subtab just under the Info tab
- Test at the end of the exercise

Customize the Entry Form

1. Go to **Lists > Relationships > Customers > New**.
2. Select the **Standard Customer Form** in the Custom Form field.
3. Click **Customize Form** from the Customize dropdown, top-right hand side.
4. You should be on the **Custom Entry Form** page
5. **Enter** the following information:
    a. Name: **CC: Customer Form for Sales**
    b. Inactive: **(leave blank)**
    c. Enable Field Editing on Lists: **check**
    d. Store Form with Record: **check** (99% of the time check this box)
    e. Form is Preferred: **leave blank**, **uncheck if necessary**
    f. Use for Pop-ups: **(leave blank**)
    g. Pop-up Only: **(leave blank)**
6. Go to the **Subtabs** subtab.
    a. Click the **Company Profile** row to highlight it. Drag and drop just under the System Information row.
7. Click the **Fields** subtab.
    a. Click the **Company Profile** sublist.
    b. Find **Industry** and check **Mandatory** checkbox.
    c. Click **Annual Revenue** to highlight the row and click **Move to Bottom** button.

8. Leave the other subtabs untouched.
9. Go to the Roles subtab and check this as Preferred for the CC: Sales manager.
10. Click Save when you are done.

Test the Custom Form

11. Switch roles from Administrator to CC: Sales Manager
12. Go to Lists > Relationships > Customers > New.
13. Select CC: Customer Form for Sales
14. You should see the Company Profile subtab after the System Information subtab.
15. Click the Company Profile subtab.
    a. Ensure that **the Industry Type field has an asterisk, indicative of a mandatory** (required) field, and the other fields are in the right locations.
16. Enter one (1) new customer. Ensure that all the fields on the **Company Profile** subtab are completed.
17. Under the **Relationships** subtab, **Contacts** sublist; enter one (1) contact person with phone number for this customer.
18. Click **Save** when you are done creating the customer record and make note of the Customer that you created.

Return to Administrator Role

19. Switch roles back to **Administrato**r.
20. Click **Home.**
21. **End.**

Exercise 02: Create an Internal Custom Form

Time: 5-8 minutes

Scenario: The Chatham Company would like to have a custom Employee Record form to be by viewed by the Project Managers that displays limited information.

In this exercise:

- Customize the Entry form for an employee record
- Restricting visible fields and subtabs

Create Custom Employee Form

1. Go to **Lists > Employees > Employees > New**; ensure that the Standard Employee Form is displayed.
2. Select **Customize Form** from the **Customize dropdown** list, top-right hand side; you should be on the **Custom Entry Form** page.
3. Enter the following information:
    a. Name: **CC: Employee Form for PM**
    b. Inactive: **(leave blank)**
    c. Enable Field Editing on Lists**: (leave blank)**
    d. Store Form with Record: **check**
    e. Form is Preferred: **(leave blank), uncheck if necessary**
    f. Use for Pop-ups: **(leave blank)**
    g. Pop-up Only: **(leave blank)**
4. On the **Subtabs** subtab, **only the following** should be checked under the **Show** column:
    a. Human Resources
    b. Access
    c. System Information
5. Click the **Fields** subtab.
6. On the **Main** sublist. U**ncheck** the following items under the **Show** column:
    a. Template
    b. Address
7. **Rename the following fields:**

a. Phone field to Primary Phone in the Label column.

b. Supervisor field, Display Type = Disabled

8. On the **Human Resources** sublist:

   a. **Uncheck** the Show column for all items, except the following. These are the only fields to have view access by PMs.

      i. Type

      ii. Employee Status

      iii. Job Description

      iv. Sales Rep

      v. Support Rep

   b. Choose **Disabled** on the following items under the **Display Type** column:

      i. Type

      ii. Employee Status

      iii. Job Description

      iv. Sales Rep

      v. Support Rep

9. On the **Time Tracking** sublist, choose **Disabled** for **Time Approver** under the Display Type column.

10. On the **System Information** sublist uncheck the following item under the Show column:

    a. Inactive

11. Do not do anything on the other fields and tabs.

12. Click **Save** when you are done.

Test the Custom Employee Form

13. Go to **Lists > Employees > Employees > New**

14. Review the available subtabs in the Standard Employee form.

15. Now select **CC: Employee Form for PM** in the Custom Form field.

16. You should only see the subtabs that you have selected, edit the fields that you have selected, also other fields are inline/disabled.

a. **Note:** The System Information subtab does not display on a new record, until that record is saved.

17 Click **Cancel.**

18 **End.**

Entry Form: Best Practices

Consider the following best practices, when creating custom forms:

- Create a naming convention for custom forms
  - Standard form remains in NetSuite as a template
- Create different form versions for different roles
  - Define as preferred
  - Use form for pop-ups if it is preferred
- Define a custom field as mandatory on your custom form:
  - Do not define it as mandatory at the field level
  - Enable using that custom form on other forms if needed
- Rename standard fields to match your business process

Customize Transaction Forms: Overview

The transaction form can be customized, like an entry form, but with additional capability:

- **Subtabs:** display, rename, change display order
- **Field Groups:** change display order, rename, remove, add
- **Screen Fields:** change display order and type, rename, make mandatory
- **Actions:** rename, hide or change the display
- **Sublists:** control sublists on the subtabs in a form
- **Printing Fields:** control fields to be printed in defined sections of a printed transaction
- **Quickview:** add, remove, or rearrange the fields in a QuickView
- **Roles:** make preferred for any **standard** or **custom** role
- **Linked Forms**: control which transaction form is used when you convert one transaction into another; create a chain of transaction forms that mirror your business workflow.

Review each of the form subtabs and their associated sublists

Walkthrough: Transaction Form PDF Layout

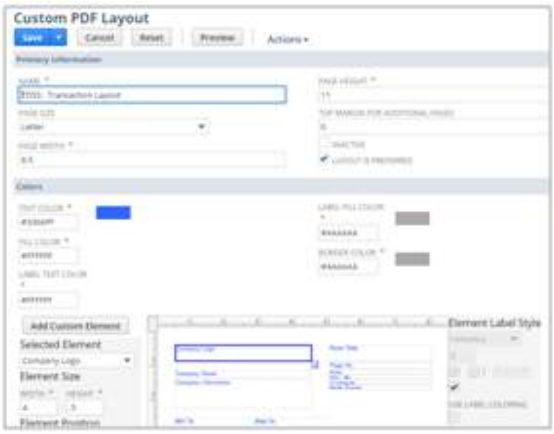
Use Case/Scenario: My company wants a specific look and feel to the printed transaction form:

- Review a Standard Sales Order transaction form PDF Layout, revise it and save it to use later.
- Review a Standard Sales Order transaction form HTML Layout, but at this point take no action

Transaction Forms: PDF Layout

By default, most transactions use the same PDF layout, which governs the printed look of the form:

- Go to **Customization > Forms > Transaction Form PDF Layouts**



- The **Custom PDF Layouts** page displays, select the form to Customize - e.g. Standard Transaction Layout
- The **Custom PDF Layout** page open
    - Enter a **Name** for your layout; follow a naming convention
    - Select **Page Size**, verify **Width**, **Height**, enter **Top Margin** and select your **Colors**
    - Use drag-and-drop functionality to edit the custom PDF layout
        - You can create custom PDF layouts for every type of transaction and link it to the custom transaction form
    - Define the **Primary** Information and **Colors**
    - Scroll down to start using the **Editor and Elements**; the right-side panel is the WYSIWYG (what you see is what you get) with drag and drop, and click on an element to edit the properties.
    - New elements can be added by using the **Add Custom Element** button.
        - Once an element is placed, other features can be controlled using the controls in the left-side panel.
        - If your logo contains your company name you can:
            - Customize the transaction form and direct the printing fields to not print the company name
            - Or, minimize the company name element, in the pdf layout

Transaction Forms: HTML Layout

By default, most transactions use the same HTML layout, which governs the emailed look of the form:

- Go to **Customization > Forms > Transaction Form HTML Layouts**

- The **Custom HTML Layouts** page displays, select the form to Customize - e.g. Standard HTML Transaction Layout
- The **Custom HTML Layout** page open
  - Enter a **Name** for your layout; follow a naming convention
  - The editing tool is **not drag-and-drop functionality**
  - Work with the Templates and Elements
- Can create custom HTML layouts for every type of transaction and link it to the custom transaction form

This course does not focus on HTML. Feel free to explore this on your own time.

Walkthrough: Customize Transaction Form – Layout and Form Elements

Associate PDF Layout

Review Form Elements

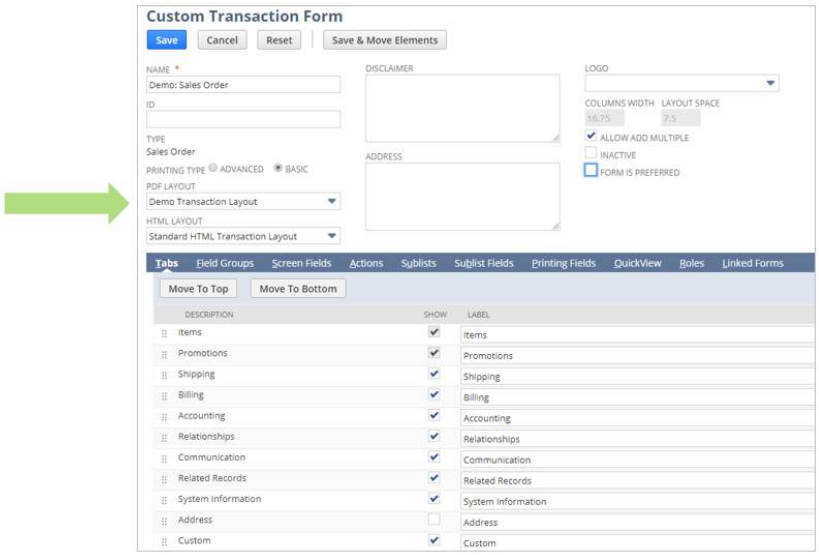
Use Case/Scenario: Now customize a sales order form:

- Associate my PDF layout, with the new text color, to a specific transaction
- Review form elements

Associate Layout

Associate a Layout to a specific transaction form. Use a standard form as the basis for your custom form:

- Go to **Customization > Forms > Transaction Forms** and select the form to customize



The **Custom Transaction Form** page displays and you can fill in the information at the top of the page:

- **Name**: Enter the name of the form users will select, avoid using the word “custom”
- **Printing Type**: Choose a printing type to define the formatting for printed and emailed transactions that use this custom form
- **PDF Layout**: Select the form that determines how the form is printed
- **HTML Layout**: Select the form that determines how the form is emailed
- **Disclaimer**: Enter a message to appear at the bottom on the form
- **Address**: You can enter a different company address to appear on this form
- **Allow Add Multiple**: Check if you are using custom code

Save versus **Save & Move Elements**

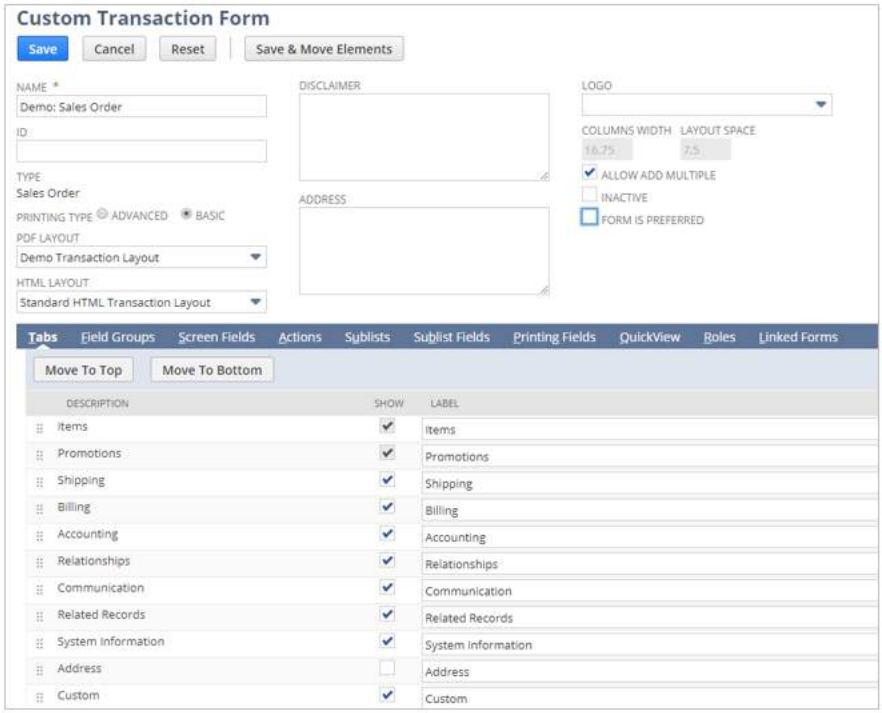
- **Save** will save your changes

Save & Move Elements allows further customization, such as moving fields from one subtab to another

Review Form Elements

Review all the elements and subtabs:

- **Tabs**
- **Field Groups**
- **Screen Fields**
- **Actions**
- **Sublists**
- **Printing Fields**
- **Quickview**
- **Roles**
- **Linked Forms**



Walkthrough: Customize Transaction Form – Actions, Roles & Linked Forms

Consider Actions

Look at Roles and Linked Forms

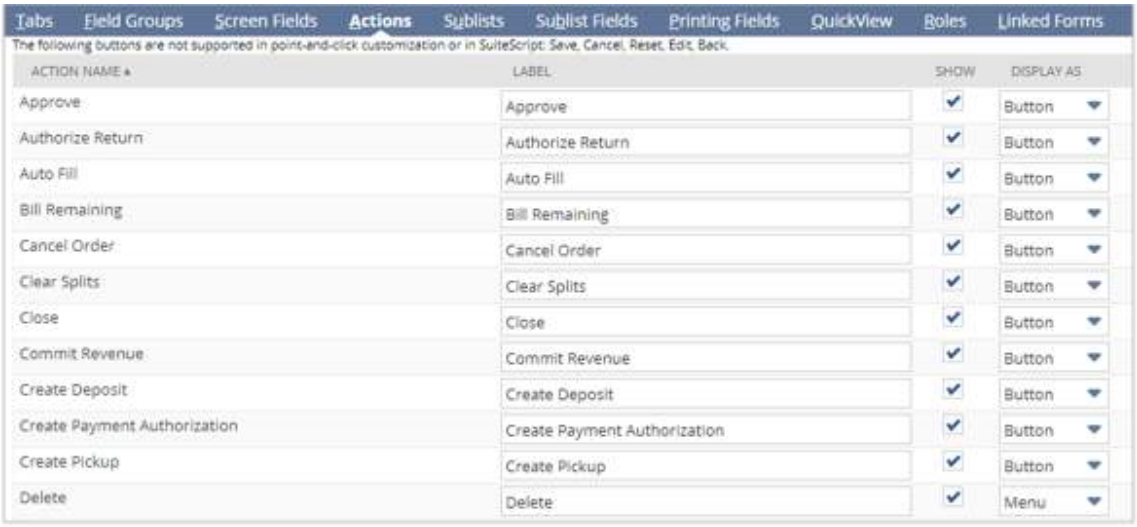
Use Case/Scenario: Continue with customizing a sales order form:

- Consider changing the display of actions; change from a button to an item under the Actions or change an item under the Actions menu to a button
- Link the sales order to a standard product invoice

Consider Actions

The **Actions** subtab on the form provides access to customize standard and custom actions:

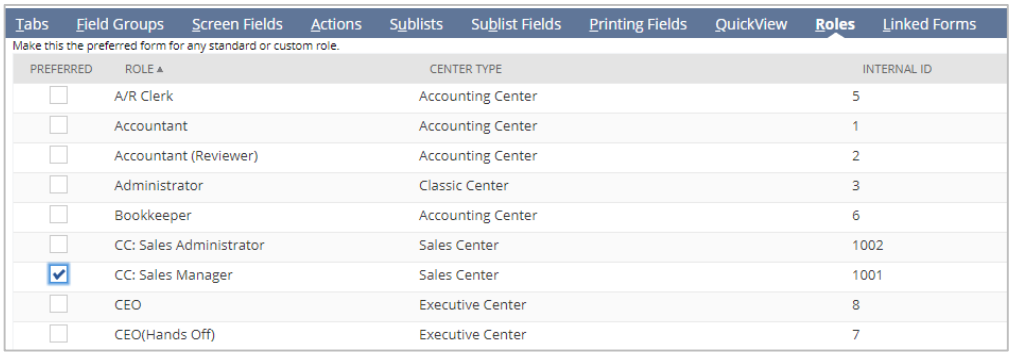
- **Standard** actions: rename, hide, or change from an inline button display to a menu item
- **Custom actions:** rename and change from inline buttons to being listed as a menu item



Important! The Save, Cancel, Reset, Edit and Back buttons are not customizable. These are used for basic, core processing.

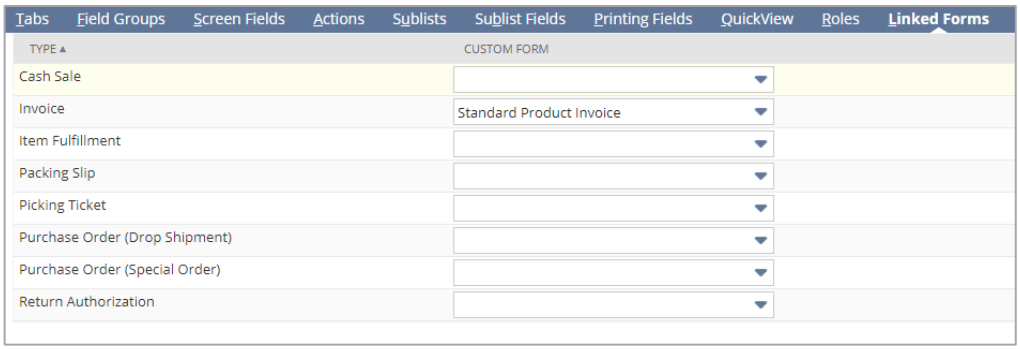
Look at Roles and Linked Forms

Go to the **Roles** subtab:



- Roles controls the ability to make the form preferred for everyone (in main area) or for a specific role
- Sort the list by role name
- Make this the preferred form for any standard or custom role
    - Select Preferred for any given role (s)

Go to the **Linked Forms** subtab



Link Forms together creating a preferred workflow to guide users:

- Guide users from one form to another, systematically
  - Define the default transaction forms involved when you convert one transaction into another; thus, creating a chain of transaction forms that mirror your business workflow.
    - For example, when a sales order is used to print a picking ticket, the custom picking ticket form selected on the sales order form is used by default.
    - Another example: A company has three custom sales order forms, each form used for a certain set of items they sell.
      - When one of these sales orders is used to create a picking ticket, the specific picking ticket form created for each type of sales order is used.
      - The employee creating the picking ticket does not have to search for the custom form dropdown to find the proper picking ticket form.
- To set up this form workflow, the administrator edits the custom sales order form, and selects the picking ticket form on the Linked Forms subtab.

Now It's Your Turn

03: Custom Transaction Forms – PDF Layouts

Use Case/Scenario:

- Customize the PDF layout for the look and feel
- Assign it to a customized sales order and test the new form
- Allow 10 – 15 minutes

Exercise 03: Custom Transaction Forms - PDF Layouts

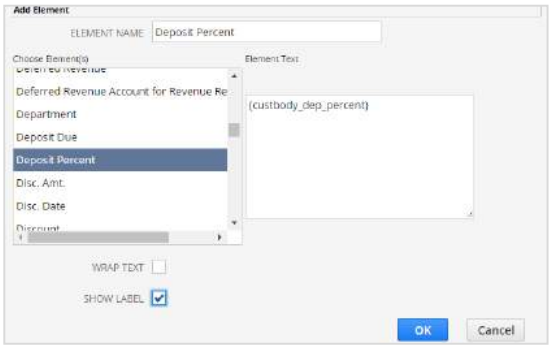
Scenario: Chatham Company wants a custom, printed version of the Sales Order form to capture some of their custom fields.

In this exercise:

- Customize the Sales Order print layout for Page Size, Preferred form, and some color considerations.

Customize the Transaction Form PDF Layout

1. Go to **Customization > Forms > Transaction Form PDF Layouts.**
2. Click **Customize** next to the **Standard Transaction Layout.**
3. On the **Custom PDF Layout** page, enter the following information:
   a. Name: **Chatham Order Layout**
   b. Page Size: **Letter**
   c. Layout is Preferred: **(leave blank, uncheck)**
4. Change Label Fill Color to **Black (#000000).**
5. Change Border Color to **Black (#000000**).
6. Scroll down and find the **Add Custom Element** button **and click** it.
   a. In the pop-up window change the **Element Name** to Deposit Percent.
   b. **Choose Element** Deposit Percent and select **Show Label.**



   c. Click **OK**
7. Drag and drop the field to a new location.

8. Click the **Add Custom Element** button.
    a. In the pop-up window change the **Element Name** to Deposit Due.
    b. **Choose Element** Deposit Due and select **Show Label**.
    c. **Click OK**
9. Drag and drop the field to a new location.
10. Click **Preview**, and make the necessary changes back in the Custom PDF Layout page.
11. Close the Preview tab.
12. Click **Save** when you are done.

Customize the Sales Order Form

13. Go to **Transactions > Sales > Enter Sales Orders**.
14. Select **Customize Form** from the **Customize dropdown list.**
15. On the **Custom Transaction Form** page, enter the following information:
    a. Name: **Chatham Sales Order**
    b. ID: leave blank, but this can be used with scripting
    c. Printing Type: **Basic**
    d. PDF Layout: **Chatham Order Layout**
    e. HTML Layout: **(leave as is)**
    f. Disclaimer: **(leave blank)**
    g. Address: **(leave blank)**
    h. Logo: **(leave blank)**
    i. Allow Add Multiple: **Check**
    j. Inactive: **(leave blank)**
    k. Form is Preferred: **(leave blank),** uncheck if necessary
16. Click the **Screen Fields** subtab, **Main** sublist.
    a. Click the **Contact Name** and select **Primary Information** for the Field Grouping; the field will move up on the page.
    b. Check **Show** and select **Normal** under the **Display Type** column.

c. Click **Contact Phone Number** and select **Primary Information** for the Field Grouping; the field will move up on the page.

d. Scroll up to find Contact Phone number; check **Show** and select **Inline Text** under the Display Type column.

e. Scroll up and now click the **Printing Fields** subtab >**Body** sublist.

f. Check **Contact Name**, **Contact Phone Number** and **Deposit Due** in the **Print/Email** column.

17 Click **Save** when you are done.

Create a Sales Order Transaction

18 Go to **Transactions > Sales > Enter Sales Orders.**

19 **Select Chatham Sales Order,** if not already selected, in the **Custom Form** field

20 Create the Sales Order as you would normally do, start with selecting a **Customer,** e.g. Test ABC**.**

21 Make sure to select a **Contact Name**, e.g. Amy Andrews.

a. The **Contact Phone Number** should auto-populate.

22 Select **MidWest** for the Location (Warehouse).

23 Enter the **Percent Deposit Required**, e.g. 10.

24 Enter/add one item of your choice.

25 Click **Save & Print.** Hint: Click the drop-down arrow to the right of the Save button.

26 You may get a pop-up blocker message. Please take the appropriate action.

22 You should see a PDF layout for the Sales Order that has the Contact Name and Contact Phone Number, as well as the Deposit Due amount at the top of the right-hand side of the form.

23 It may require some refining, such as removing some print fields, but you can do that at your convenience.

24 Close that browser tab, with the print view of the sales order.

25 Click **Home.**

Transaction Forms Best Practices

Consider these best practices when working with transaction forms:

- Create a naming convention for custom forms
  - Standard form remains in NetSuite as a template
- Create different form versions for different Roles
  - Define as preferred and use form for pop-ups if it is Preferred
- Define a custom field as mandatory on your custom form
  - Do not define it as mandatory at the field level
  - Enables using that custom form on other forms if needed
- Rename standard fields to match your business process
- Edit **PDF** layout for **printed version**
- Edit **HTML** layout for **emailed version**
- Use Printing Fields to determine what to Print/Email

Activity: Customizing Forms

Can you answer the following questions?

- True or False: Develop a naming convention for your custom forms and layouts, as a best practice

- Which layout controls the printed look of transaction forms?

- How do you create a transaction workflow?

- True or False: Editing the PDF layout uses point and click functionality.

Consider Advanced PDF/HTML Templates

Investigate the Advanced PDF/HTML Templates (Beta) feature, which provides expanded transaction form customization capabilities:

- Go to **Setup > Company > Enable Features > SuiteCloud** subtab, **SuiteBuilder** section and select **Advanced PDF/HTML Templates**
- These templates introduce a template-based model for print customization, and to allow you to try it out on a selected set of transactions.
- Transactions currently supported include: cash refund, cash sale, credit memo, customer deposit, invoice, packing slip, payment voucher, picking ticket, purchase order, quote (estimate), return authorization, and sales order templates.
- Please refer to SuiteAnswers for more information

Additional Resources

NetSuite Help Center:

- SuiteBuilder Guide
- Encrypting Custom Field Stored Values
- Customizing Delete Behavior for Records Referenced by Custom Fields

SuiteAnswers Learning Center:

- New Feature Training
- Customization/Integration

Create Custom Records

About this Module

Custom subtabs, lists and fields will serve some of our needs. However, we are unsure about how to capture employee and customer information that will support us over time:

- What is the best way to track events or activities against an employee or customer?
- If adding custom fields becomes too tedious, are there other options?
- How could we create a new type of form, that is not an entity or transaction form?
- What if we need to track information, which is not supported by a standard record type?
- Can I create two custom fields; the choice made in the first field determines the available options in the next field?

Objectives

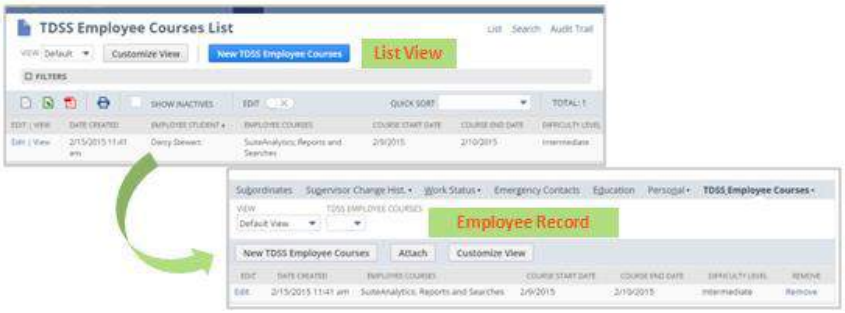
1. Determine when a Custom Record is a better solution than creating new fields
2. Plan, design and create a Custom Record using best practices
3. Identify the steps in working with Dependent Dropdowns
4. Use tips to troubleshoot the Custom Record

Activity: Is this a good way to track employee training events?

We want to track courses that our employees take; we have created a custom subtab, a few lists, and custom fields. Will this be scalable and work for us over time regarding:

- Display?
- Functionality?
- Practicality?

Custom Record Overview



A custom record will meet the needs of tracking unique records:

- A standard record of Entity, Item, Transaction, or CRM does not meet your requirements
- Too many custom fields are required, making maintenance and usability difficult
- A One-to-Many Relationship (1:M) is required or unique Parent: Child relationships:
    - NetSuite uses a custom record to capture course evaluations
    - The parent record is a course and the child records are all the evaluations for the course
- An online entry form needed (not Lead, not Case)
    - NetSuite created a form for the evaluation completion and submission
- Provides a new form, e.g. Employee Courses
- Presents a list of the records, e.g. Employee Courses List and connects to the parent record, employee

Walkthrough: Create a Custom Record Type

Enable the Feature

Define Record Attributes, Behavior, and Subtabs

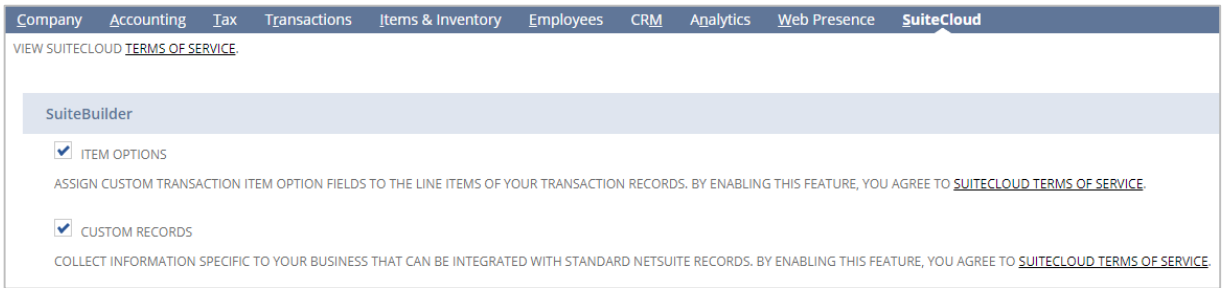
Use Case/Scenario: We need to track courses that our employees complete:

- We need to enable the feature and then start defining the record
- We want both a list of these courses and see information on the employee record.

Enable the Feature

To use custom records, the **Setup > Company > Enable Features > SuiteCloud** subtab > SuiteBuilder section and select **Custom Records:**

- If you have not already done so, you may be prompted to view SuiteCloud Terms of Service



Once the feature has been enabled, creating a custom record follows a sequence of actions:

- Define record attributes and behavior
- Create necessary subtabs and save to create the record in the database
- Create custom fields and define other elements of the custom record

Define Record Attributes, Behavior and Subtabs

Use Case:
Track courses that our employees complete

Define some basic attributes and behavior as the first step:

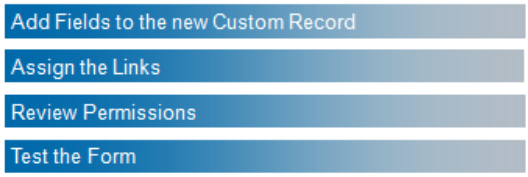
- Go to **Customization > Lists, Records, & Fields > Record Types > New**
- The **Custom Record Type** page opens

- At the top of the page, define some basics:
  - Enter the **Name** for the record type, e.g. Employee Courses
  - Set display options and available actions**:**
    - **Access Type**: choose one of the three options to meet your needs. The default is to require the custom record permission
    - **Records are Ordered**: Edit the order of the records on the parent record, otherwise, it will be alphabetical
    - **Enable Optimistic Locking**: enable to protect custom record data integrity. Optimistic locking assumes that multiple concurrent transactions can usually complete without affecting each other, so data resources do not have to be locked while transactions are in process. Instead, a check for conflicts occurs before each transaction is committed.
    - **Enable Inline Editing**: custom record data to be is editable on lists
    - **Show Creation Date**: On Record or On List. Check **On List** if:
      - Creation Date needs to be displayed in a List view
      - Creation Date needs to be viewed as a sublist from a Parent record
    - **Show Last Modified**: On Record or On List. Check **On List** if:
      - Last Modified needs to be displayed in a List view
      - Last Modified needs to be viewed as a sublist from a Parent record
    - **Show Owner**: On Record or On List. Check **On List** if:
      - Show Owner needs to be displayed in a List view
      - Show Owner needs to be viewed as a sublist from a Parent record
    - **Show Owner: Allow Change:** allows users to be selected from a list when the record is entered, instead of using the current user.
- Review field help for other check boxes; consider your business requirements

Scroll down on the page to **Subtabs:**

- Define Subtabs, *for example in the use case*
  - Courses
  - Evaluation (this might have instructor's evaluation of the student)
- **Save** the record so that it is created in the database, and then proceed to create Fields and other customizations
  - After saving the Custom Record, additional field and subtabs appear:

Walkthrough: Add Fields and Assign Links for the Custom Record



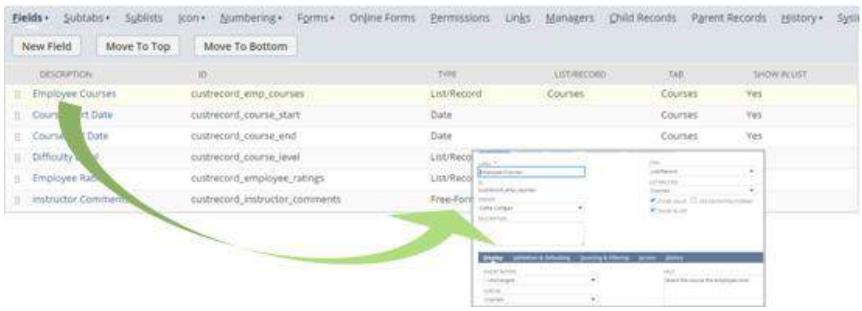
Use Case/Scenario:

- Add fields: available courses, start and end dates for each course, difficulty level of each course, and instructor comments
- Assign the fields to the appropriate subtab
- Review other subtabs on custom record
- Assign links for user navigation
- Test the form

Add Fields

Once the custom record has been created, a **Fields** subtab displays. Create fields and add to the appropriate subtab; consider which custom field type best serves your purpose.

- **Go to** Fields **subtab**
- Click **New Field** button, for example in the use case
  - List/Record for a list of courses, assign to Courses subtab
  - Date field for the start date of the course, assign to Courses subtab
  - Date field for the end date of the course, assign to Courses subtab
  - List/Record for a list of difficulty levels, assign to Evaluation subtab
  - List/Record for a list of student ratings, assign to Evaluation subtab
  - Long Text for instructor comments about the student
- Enter in the information
  - This is the same as creating other custom fields
  - On the **Display** subtab, you will choose one of your custom records **Subtab**
  - Set any other field definitions
  - Save
- To edit any field, click on the field name

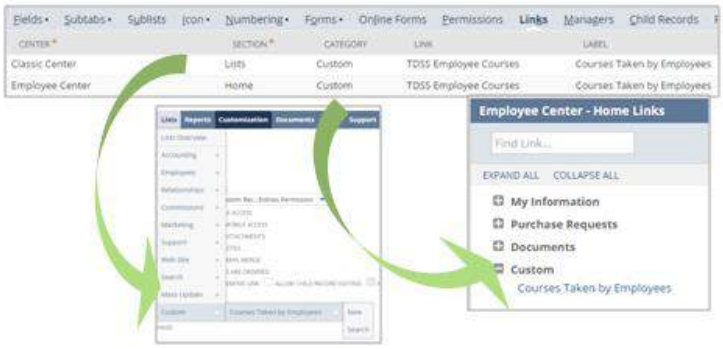


Assign Links for User Navigation

Define the location for users to access the custom records:

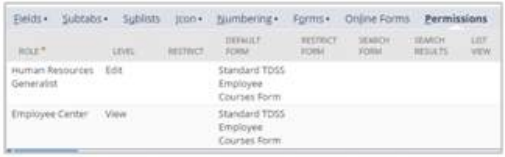
- Go the **Links** subtab to map out navigation:
  - Define the Centers for the custom record, e.g. Classic
  - Define the Section for each Center, e.g. Lists
  - Enter in a label to identify the menu item for the custom record
    - In the example use case - Lists > Custom > Courses

Note: Numbering (**Numbering** subtab) can be enabled at this point, however the recommendation is to do this later after records have been in use for a while. Once a record is numbered, it cannot be un-numbered



Review Permissions

Review the **Permissions** subtab:



- Human Resources will enter, view, and edit the record
- Employees can view the records

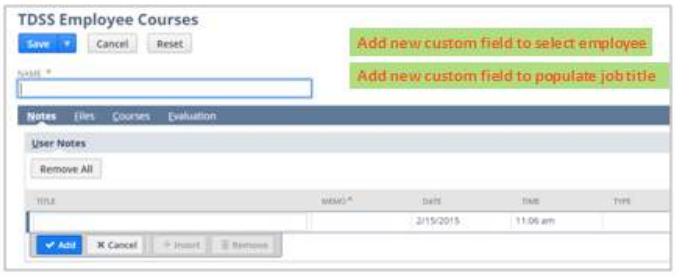
Go the record header:

- Set the Access field to Use Permissions
- **Note: The Best practice is to not set the field until the form is ready to use**

Test the Form

Open the form and evaluate the look and functionality

- Follow the navigation as defined in the **Links**, e.g. **Lists > Custom > Employee Courses**
- View the form and make note of changes you might want to make; for our use case:
  - Rearrange the subtabs
  - Remove the Name field; we would rather have the user select from a list of employees



Walkthrough: Edit the Custom Record and Form

- Edit the Record and Form
- Add a Parent-Child Field and Source in Information
- Test the Form
- View the Custom Record in a List
- Create or Modify the Record from the Parent Record

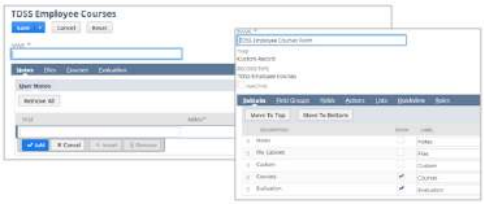
Use Case/Scenario: After the assessment of the form, we want to:

- Rearrange the subtabs and remove the Include Name Field
- Link the course record to the employee record; populate employee job title
- Confirm that we can see a list of courses taken by employees
- Add a new course from an employee record

Edit the Custom Record

Use Case: Rearrange the subtabs and remove the Include Name Field. Have the course record linked to the employee record and populate the employee job title

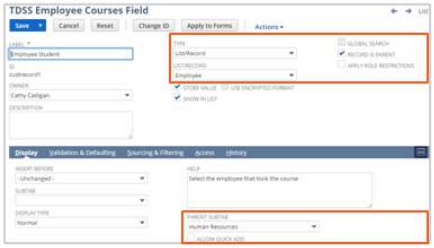
Go to **Customization > Lists, Records, & Fields**, click the record name:



- Uncheck **Include Name Field**
- Go to the **Forms** subtab:
  - Click **Customize** for the **Standard Employee Course Form**
  - Enter a **Name**, use a naming convention
  - Select **Form is Preferred**
- Change the order of the **Subtabs**, for example:
  - Courses
  - Evaluations
  - Notes File Cabinet
  - Workflow
  - Custom
- Click **Save** to save the new form

Add Parent-Child Field

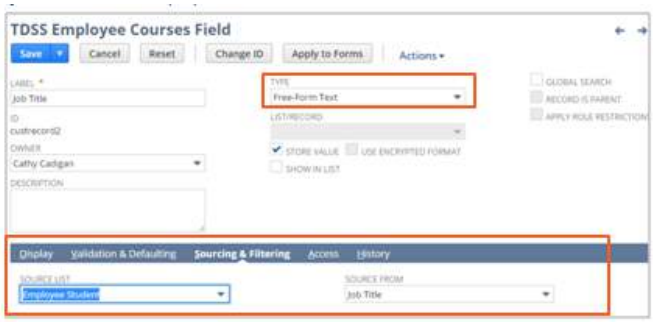
Click **New Field to** add a **List/Record** type of field and point to the parent record:



- Enter a **Label**, e.g. Employee Student
- In the new field select **Type** – **List/Record**
- In the **List/Record** field chose the record to point to, e.g. Employee
- Select **Record is Parent**; establishes the 1:M relationship (Parent: child)
  - Like creating a foreign key in relational database world
- On the **Display** subtab:
  - Leave **Subtab** blank
  - Select **Human Resources** for **Parent Subtab**
- **Save & New**

Source Information from another Record

The employee's job title needs to be captured:



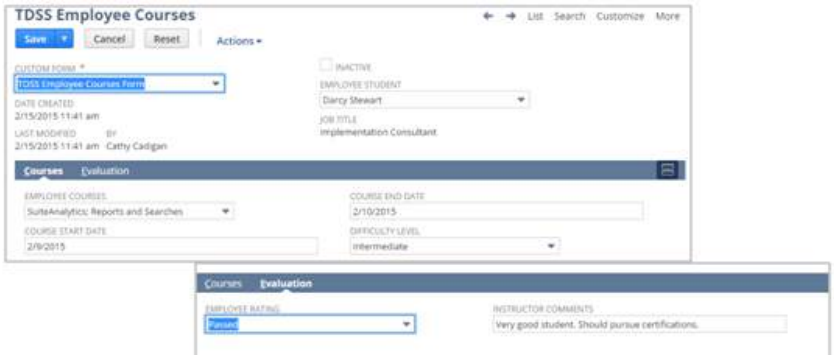
- Add another field to display the job title; the display type should be inline text
- Pull the job title from the employee record
- Enter a **Label,** e.g. Job Title
- Choose the correct field **Type**, e.g. Free-Form Text
- Go **to Sourcing & Filtering** to define from where the information is coming
    - **Source List** = Employee Student
    - **Source From** = Job Title
- **Save**

Test the Form

Open the form and evaluate the look and functionality.

Use Case: Review the functionality to confirm 1) that we can see a list of courses taken by employees and 2) we can add a new course from an employee record

- Follow the navigation as defined in the Links, e.g. **Lists > Custom > Employee Courses > New**



- Validate the following:
    - Can you select the Student Employee?
    - Does the Job Title populate?
    - Which subtabs are available and in what order?

View the Custom Record in Different Locations

Once the form is completed for a student and saved, it is available:

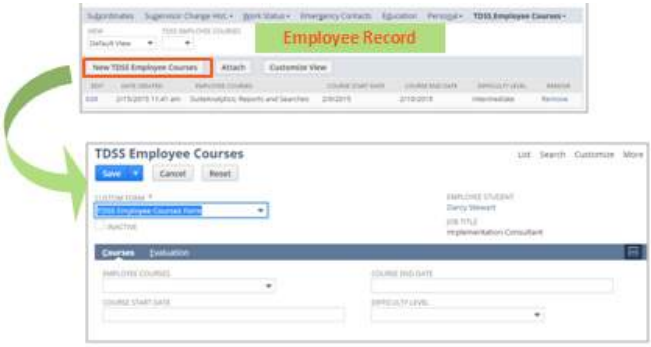
- In a list of Courses Taken by Employees

- On the employee record **Human Resources** subtab, **TDSS Employee Courses** sublist

Create or Modify from the Parent Record

Go to an **Employee** record, **Human Resources** subtab, Employee Courses sublist:

- Click **Edit** to modify existing record
- Click **New** to create new records



Now It's Your Turn

01: Create Custom Record

Use Case/Scenario: On each customer record, we want to track the following:

- Credit checked: yes or no
- Risk/Rating value
- Rating explanation
- Allow 10-15 minutes

Exercise 01: Create Custom Records

Time: 15-20 minutes

Scenario: Chatham Company tracks the credit risk/rating of each customer. On each customer record, we need to track the following:

- Credit Checked (yes or no)
- Risk/Rating (dropdown list of two values)
- Reference

In this exercise:

- Enable custom records
- Create custom List
- Create a custom record
- Create custom fields

Enable Feature

1. Go to **Setup > Company > Enable Features**.
2. Click the **SuiteCloud** subtab.
3. Under **SuiteBuilde**r, check **Custom Records**. If Item Options are already checked, then do not change.
    a. If unchecked, check the box and agree to the terms.
4. Click **Save.**

Create Custom List

5. Go to Customization > Lists, Records, & Fields > Lists > New.
6. Add a new Custom List named Credit Rating.
7. Show options in: the order entered.
8. **Enter and Add** each of the following items under the **Value** column:
    a. Risky
    b. Worthy
9. Click Save.

Create the New Record Type

10 Go to Customization > Lists, Records, & Fields > Record Types > New.

11 Make the following field modifications:

a. Name: **Credit Risk/Rating**

b. Include Name Field: **uncheck**, because we will be creating a parent: child relationship via a custom field

c. Show Creation Date on List: **check**

d. Show Last Modified on Record: **check**

e. **Show Owner on Record** and **Allow Change**

f. Access Type: Leave as - **Require Custom Record Entries Permission**

12 Go to Subtabs subtab and enter under Title: Rating, click Add.

13 Click Save.

Create New Field for Customer (Parent) and Credit Rating

14 Click the New Field button on the Fields subtab.

15 Make the following field modifications:

a. Label: **Customer**

b. ID: **_credit_cus**

c. Type: **List/Record**

d. List/Record: **Customer**

e. Store Value**: Check**

f. Show in List: **check**

g. Record is Parent: **check**

16 Enter the following information in the Display subtab:

a. Subtab: **leave blank**

b. Display Type: **Normal**

c. Parent Subtab: **Financial**

17 Click Save & New, to save and add another field.

18 Make the following field modifications:

h. Label: **Credit Reviewed**

i. ID: **_credit_reviewed**

j. Type: **Check Box**

k. Store Value: **check**

l. Show in List: **check**

19 Enter the following information in the **Display** subtab:

a. Subtab: **Rating**

b. Display Type: **Normal**

c. Normally you would also enter useful Help for this custom field

20 Click Save & New, to save and add another field for a list of value for Risk Rating

21 Make the following field modifications:

m. Label: **Risk Rating**

n. ID: **_risk_rating**

o. Type: **List/Record**

p. List/Record: **Credit Rating**

q. Store Value: **check**

r. Show in List: **check**

22 Enter the following information in the **Display** subtab:

a. Subtab: **Rating**

b. Display Type: **Normal**

23 Click **Save.**

24 Review the **Fields** subtab and the list of fields.

You should now be back on the Custom Record Type page

25 Click Links subtab.

26 Enter the following on the first line:

s. Center: **Classic Center**

t. Section**: Lists**

u. Category: **Custom**

v. Link: **Credit Risk/Rating**

w. Label: **Customer Credit Risk/Rating**

26 Click **Add.**

27 Click **Save** when you are done.

28 Note: You may see the following Notice: Items you have requested in the record have been deleted since you retrieved the form

Test the custom record

29 Go to **Lists > Custom > Customer Credit Risk/Rating**

30 Click the **New Credit Risk/Rating** button.

31 Enter the Customer as **TEST ABC.**

32 Navigate to the **Rating** subtab and enter the following:

a. Credit Reviewed = **Check**

b. Risk Rating = Select **Worthy**

33 Click **Save**.

34 Enter **TEST ABC** in to (Global) Search.

a. **View** the record.

b. Click the **Financia**l subtab.

b. Click **Credit Risk/Rating** sublist and confirm that your credit rating information is there.

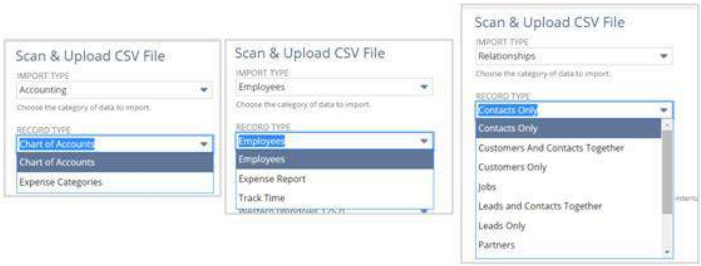
35 End.

Dependent Dropdowns Overview

Use Case: Allow a support rep to use a customized case form to 1) select operating system being used by the employee and 2) select the supported browser being used by the employee

In a “dynamic” list; selecting a value in first field provides a set of related choices in the second field:

- Can be multiple levels deep
- Association between lists is achieved by adding a filter that relates one list to another



Introduction to Optional Exercise

Use Case/Scenario: Allow a support rep to use a customized case form to:

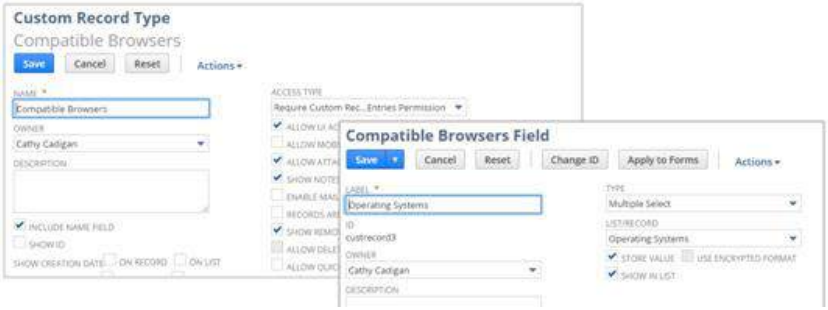
- Select the operating system being used by the employee and
- Select the supported browser being used by the employee

Custom List: Operating Systems

Create a custom list of operating systems used by employees:

- Go to **Customization > Lists, Records & Fields > Lists > New**

Custom Compatible Browsers with Field for Operating System



Create a new record for compatible browsers:

- Go to Customization > Lists, Records & Fields > Records > New - “Compatible Browsers” and Save
- Add a new Multiple Select field for Operating System, points to our Operating Systems list

Create Combination of Operating Systems and Browsers

Now we want to define the combinations:

- Go to **Customization > Lists, Records & Fields > Records** and click **List** for Compatible Browsers

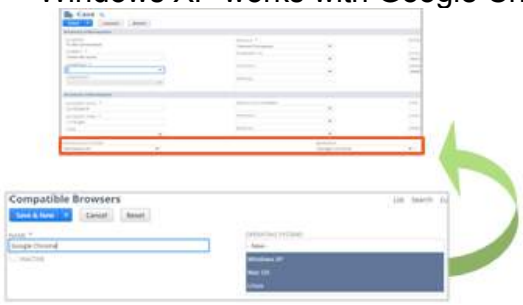
- In the **Compatible Browser List**, click the **New Compatible Browser** button start entering your combinations and save each combination e.g. Internet Explorer and Google Chrome

Create a Custom Case Form

Enable the **CRM – Customer Support Feature**

Create a custom case form that will allow a support rep to enter a case and choose:

- Operating System
- Browser
- Windows XP works with Google Chrome



Now It's Your Turn – Optional Exercise

Go the Appendix in this book

Use Case/Scenario: Use Dependent Dropdowns to allow Support Reps to:

- Open a support case
- User custom fields on the case record to select user's operating system and one of the supported browsers
- Allow 20 - 30 minutes

Troubleshooting Custom Records

It is important to test incrementally as you work with custom records and elements:

- If the custom element doesn't display or doesn't accept changes made:
  - Log out and in again
  - Clear the cache on your browser
  - Try using a different browser

- When all fails, call NetSuite Support
  - Walk through creation steps
  - If possible, compare live account to functioning test account
  - Log a case first; continue working on the issue

- Use other Help resources (Online Help, User Group, NetSuite Support Center)

Custom Records Best Practices

Consider the following best practices for custom records:

- Create custom records when **1:M (1: Many)** is required
- Save your custom record first, then add fields
- Include a **List/Record field** and define **Record is Parent**; **establish the Parent: Child (1:M) relationship**
- On Custom Records, use **Show in List** for the record's custom fields
- **Use Permissions** only when the custom record is ready to be used
- If you choose to, you can create a subtab on the Parent record to receive the custom record
- Create dependent dropdowns by creating custom lists and records, and applying filters to limit the results

Activity: Custom Records

- What are some factors in considering a custom record?
- What kind of field do you need to add to create the Parent: child relationship?
- True or False: NetSuite creates a form for your custom record
- True or False: Dependent dropdowns can be multiple levels deep?

Additional Resources

NetSuite Help Center:

- SuiteBuilder Guide User Guide
- Custom Records
- Multiple Dependent Dropdowns

SuiteAnswers Learning Center: Training Videos

- New Feature Training
- Customization/Integration

Access video from NetSuite Essential tab, in this demo account:

- Day 2 - Customization: SuiteBuilder Custom Records

If you are interested in an optional exercise, Create Dependent Drop Downs, then go to the Appendix of this workbook

Migrate Your Data

About this Module

My company will occasionally need to bring in new data or even update data and I am wondering:

- Is data migration complex and time consuming?
- Can I update data through some sort of import?
- What are the related tasks that an administrator should complete?
- Are there any data migration tips?

Objectives

1. Determine the appropriate strategy for importing data
2. Prepare the data for import
3. Use the Import Assistant to import data in .CSV files for common record types
4. Define and save Import Assistant templates for reuse
5. Apply best practices for successful data imports

Data Migration Overview

Data migration may be a key to adding new data into your NetSuite Account, such as a purchased list of leads.

Successful migration has the following, key phases:

- **Identify the data objects** that need to be migrated
- Determine an **import strategy** for data migration
- **Prepare the data** for import
- Use the **Import Assistant**

Data Migration Considerations

The following are some questions and considerations for data migration:

- How much CRM or transaction history needs to be migrated to the new system?
- How will you enter in opening balances?
- How do you know what is available in NetSuite and what to add?
    - Will you need to do any customization in NetSuite first?
- How will you handle entities with multiple addresses and doing business with your various legal entities?
    - Will you be using a OneWorld account; defining subsidiary/entity relationships?
- Do you need to use NetSuite Professional Services or do it yourself?

Activity: Your Data Migration Needs

Will you be bringing in any of the following record types? Comments?

Record Type	Comments
Entities	
Transactions	
CRM	
Items	
Custom?	

Data Migration: Overview of Tasks

Let's start looking at some of the possible tasks

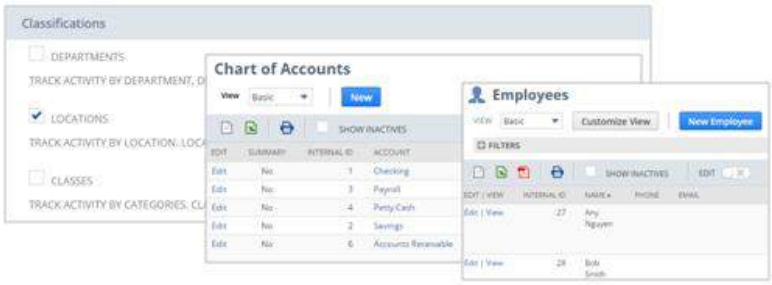
OneWorld: Set Up Subsidiaries

If you have a OneWorld account then subsidiary data must be in place, for example:

- Tax nexus
- Currency
- Go to **Setup > Company > Subsidiaries > New**

Follow a Suggested Sequence

You are setting up a shell into which the data is imported; a logical sequence, for imports, should be followed due to the relationship between the data:



- **Classifications**, if enabled: Department, location, class
  - **Departments**: Are usually groupings per management responsibilities
  - **Locations**: Are usually groupings per geography
  - 1:1 relationships with subsidiaries
  - **Classes**: Are used for more general groupings
- **Chart of Accounts**:
  - Turn on auto-generated numbers if necessary
  - Remember that NetSuite also provides a standard list of accounts
- **Employees**:
  - Sales reps and support reps may need to be available for assignment to imported records

Best Practices: Classifications and Chart of Accounts

- **If needed, set up classifications (D/L/C) prior to import**
- Use the provided Chart of Accounts:
    - Rename accounts to your company's naming convention; use the renamed accounts in NetSuite, not your pre-existing accounts
    - If importing accounts with account numbers, define the preference at **Setup > Accounting > Accounting Preferences**

Consider Auto-Generated Numbers Feature

Review the setting for Auto-Generated numbers of entity records. This is an important consideration/decision to be made before importing existing data. Once you enable auto generate numbers, you cannot switch back.

- Go to **Setup > Company > Auto-Generated Numbers**
    - Enable auto-generated numbers to have NetSuite generate IDs for your Entities:
    - This option is beneficial when you have multiple customers with the same name. Using auto-numbers ensures all your customer records are unique.
    - The concept of using numbers along with names or a prefix (C = customer, V = vendor) is a consideration.
- Check **Allow Override** to import your legacy entity IDs
    - NetSuite concatenates the auto-generated number with the company name. As a result, you can search for the Customer in NetSuite using Global Search by name or number
- **Update:** Is used to auto-number records that have not been previously numbered.
    - The Update box cannot be checked if you have checked the Locations box or the Subsidiaries box.
    - Review Help for other behavior of the Update function
- Use External IDs when importing entities; External IDs make it easier to import transactions and CRM records by avoiding use of Entity IDs:
    - Entities with parent/child relationships
    - Entities using auto-generated numbers

In the Import Assistant define the **Import Type** and **Record Type**:

- **Import Type:** Employees
  - Available Record Types: Employees, Expense Report, Track Time
- **Import Type:** Relationships and select from available **Record Types:**
  - Contacts Only
  - Customers and Contacts Together
  - Customers Only
  - Leads and Contacts Together
  - Leads Only
  - Partners
  - Prospects and Contacts Together
  - Prospects Only
  - Vendors

Considering the following best practices for customer and contacts:

- Import Customer records first
- Import Contact records second
- Consider values associated with Global Subscription Status field
  - A marketing automation consideration
- Designate one address as the primary address when importing multiple addresses

CRM and Other Records

Activities and Communications support importing in some CRM Data:

- Tasks, Messages, Notes

Please review Release Notes and Help topics in SuiteAnswers for newly support records for import:

- Each release, NetSuite adds to the list of supported record types

Use Web Services/SuiteTalk to import unsupported record types

- Please refer to the CSV Imports Overview in the NetSuite Help Center

Import ERP Data

ERP and transaction records are associated with entity or relationship records:

- Items - if you have enabled the corresponding features:
  - Inventory items, serial and lot numbered, matrix items, assemblies, kits
  - Non-inventory items (sale, resale, purchase)
  - Service items (sale, resale, purchase)
- Transactions can be Posting or Non-posting:
  - Account Receivables such as: Opportunities, Estimates
  - Accounts Payables such as: Purchase Orders, Bills, Vendor Payments
  - Journal Entries

Best Practices: Items

- Enter a beginning inventory cost
- Use the Adjust Inventory Worksheet to enter starting inventory quantity (just before going live!)
  - Must do some setup for matrix items (other lists)

The following items may be imported, if you have enabled their corresponding features:

- Can import inventory items, matrix items
- Can import serial inventory numbers
- Can import lots, assemblies, kits
- Can import non-inventory items (sale, resale, purchase)
- Can import service items (sale, resale, purchase)

Best Practices: Transactions

- Do not import large numbers of historical transactions – storage will cost you
  - The storage space allowed is listed on your sales order
- Use ‘entity account names’ and numbers when importing transactions, not the Chart of Accounts number
- Keep in mind that imported transactions will behave just as if they were created in the User interface:
  - For example: If you import an Invoice or a Vendor Bill with Inventory Items, then that transaction WILL affect inventory

Activity: True or False

Indicate if the statement is true or false.
1. True or False: You must use Departments/Locations/Classes
2. True or False: NetSuite supports imports of .csv files
3. True or False: All record types are available for import via .csv

Data Import Preparation

Preparation for Data Import is crucial to have a successful import:

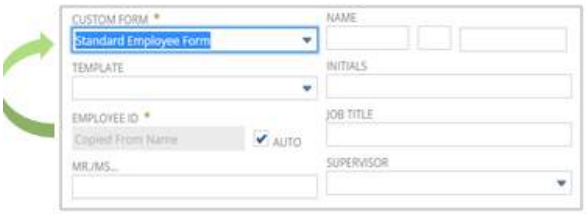
- Review existing data and ***scrub the data***
- Determine **import options**
- Determine **how to map** from existing application into NetSuite
- Create a **.csv template**
- **Run test** imports
- **Resolve errors**
- **Plan** for the data migration
- **Execut**e the data import
- **Resolve** any errors
- Review data validity, have a sign off
- Importing Employees Example

Walkthrough: Import Employees

Use Case: Our Company will be acquiring another company, and the employees, and we need a way to quickly bring in new employee records.

Review and Determine Options

Review how NetSuite stores a record, for example an employee record:



- Go to **Lists > Employees > Employees > New** to review a **New Employee** form
- What are the available fields?
- How does NetSuite handle the data?
  - We notice that **Employee ID** is Copied From Name

Create a.csv Template

View any list of records in NetSuite, to export out a .csv file:

- We want to go to **Lists > Employees > Employees**
  - Select the **View** that displays the most appropriate columns, e.g. Basic
- Select the **Export – CSV** icon at the top of the list
  - Open the new file
  - Enter new values into your template and save as .csv

idea

You can use an empty list of record, just review the columns and set the View to show the columns that you want

Template-Based Imports: Here are some imports that can be performed using the template-based approach:

- Journal Import
- Bulk Fulfill Orders Using a CSV Import
- Importing a Vendor Price List
- Importing Keyword Campaigns
- Importing Employee Commission Data
- Importing Budgets

Import the Revised .csv File

Go to **Setup > Import/Export > Import CSV Records** and complete the following steps:

- **Scan & Upload CSV File**
- Define **Data Handling**
- Correctly define **Field Mapping**
  - For example: Map Name to Employee ID

Save and Run

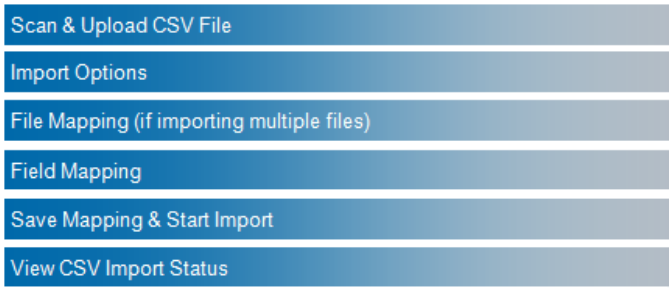
Save and Run the import; saves the mapping for future use:

- View confirmation message

- View Import Job Status: goal is to have Complete at 100% and all records imported successfully

- View List of Employees, to see our additions

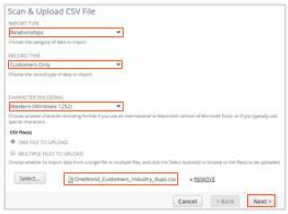
Walkthrough: Import Assistant – Your Exercise



Use Case: Import in customers – This is a preview of one of your exercises

Scan & Upload CSV File

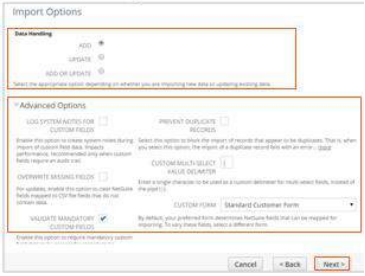
Go to **Setup > Import/Export > Import CSV Records** and **Scan & Upload CSV File:**



- Select **Import Type**, e.g. Relationships
- Select the **Record Type**, e.g. Customers Only
- Define **Character Encoding**
  - Use Character Encoding UTF – 8 if you have special characters to import (umlauts, accents or characters such as Chinese)
- Select **File**, review the file name and click **Next**

Import Options

Select one of the **Data Handling** options based on whether you are importing new data or updating existing data and consider **Advanced Options**:



- Add
- Update
- Add or Update: If using Add or Update, turn off Auto Generated Numbers

Advanced Options:

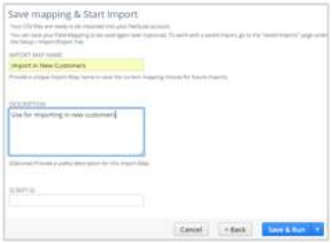
- Review each option and select as required by your business needs
- Use “Overwrite Missing Fields” and “Add or Update” if you need to remove data from a record.
  - Include Name/ID and field you want to empty, data on existing records will be deleted
- Note that you can also Validate Mandatory Custom Fields
- Select **Prevent Duplicate Records**; this works in tandem with the feature “Duplicate Detection”
  - Uses the criteria defined in **Setup > Company > Duplicate Detection**
- Click **Next**

Field Mapping

The most critical step is mapping **Your Fields** to **NetSuite Fields**:

- The CSV file was scanned and NetSuite has done a preliminary mapping
- **Left-hand column** represents **Your Fields** (columns) in your file
- **Right-hand column** represents **NetSuite Fields** (columns)
- **Center column** shows the **preliminary mapping**, now you need to complete the mapping
    - **Edit** the field to set a default value, by clicking the pencil icon
    - Find a blank line and **add Your Fields** to the corresponding **NetSuite Fields** by clicking on the field names in the left or right-hand columns; alternately you can drag and drop fields into the center column
- Click **Next** when you are done mapping

Save Mapping & Start Import



Saving the import map enables you to create your own template for future imports with same data structure:

- **Import Map Name:** provide a unique name to save your mapping and use for future imports
- **Description**: provide an optional description
- **Script ID**: provide a unique ID to identify this mapping to pull into SuiteScripts

When you are ready, do one of the following:

- Save: saves your mapping and allows you to run the import later
- Save & Run: saves the mapping and executes the import
- Run: executes the import but does NOT save your mapping

View CSV Import Jobs

If **Run** or **Save and Run** selected, a confirmation message displays with a link to View the import jobs queue

Or navigate to Setup **> Import/Export > View CSV Import Status**:

- Date driven
- Status
- Percent Complete
- Message:
- CSV Response
- Click Refresh until jobs show 100% complete

Data Import Best Practices

Use the following best practices to facilitate successful imports:

- **Scrub your data** before importing it
- Save data from other applications **into separate CSV files**:
  - Exception import Customer/Prospect/Lead **with** contacts
- Apply CSV file **formatting guidelines**:
  - Adjust data to conform to NetSuite file conventions and record types
- **Perform test imports** with a sample set of data; use only 2 or 3 records to start
- Perform import tasks during **off-peak hours**:
  - Break large jobs into smaller chunks to improve performance
  - The limit is 25,000 records per imported file
- Identify where the imports will happen, e.g. production or sandbox

OneWorld Best Practices

Additionally, consider these OneWorld account best practices:

- Setup subsidiary records prior to importing any data
- CSV file values for subsidiaries should be hierarchical names in the grandparent format: Parent: child
- *OneWorld* accounts must map NetSuite subsidiary field to a field in the .CSV file

Next Steps

Use Case/Scenario: Your company needs to be able to import in entity records:

- Review the setting for auto-generated numbers
- Import in a list of new customers
- Update existing customer records with annual revenue
- Create a template to use for future imports of vendor records
- Allow 30-40 minutes

Exercise 01: Review Auto-Generated Number Settings

Time: 1-2 minutes

Scenario: Your Company is not assigning numbers to entities; in this exercise:

- Validate that you have turned off the Auto-Generated Numbers feature from an earlier exercise.

1. Navigate to **Setup > Company > Auto-Generated Numbers**.
2. Under the **Entities** subtab, there should be no checkmarks!
3. If there are: Uncheck Subcustomer and Job; then uncheck Customers.
    a. Subpartner may be checked, but grayed out. This is okay.
4. Click **Save**.
5. **End.**

Exercise 02: Import Customers

Time: 10-15 minutes

Scenario: Chatham Company has completed their NetSuite customization, facilitating capture of the additional customer information. They are ready for data migration of a list of their customers. They will import using the NetSuite Import Assistant.

In this exercise:

- Use a csv file we provide
- Use the Import Assistant to import the csv file.

Get CSV file

1. Download **OneWorld Customers Industry_dups.csv** file from https://tinyurl.com/NSOWcustdup place it on your desktop.

Confirm or Enable features

2. Go to **Setup > Enable Features > SuiteCloud** subtab:
3. In the **SuiteScript** section confirm or select the following features:
    a. **Client SuiteScript** and agree to terms popup, if necessary.
    b. **Server SuiteScript** and agree to terms popup, if necessary.
4. **Save**

Get to Import Assistant

5. Navigate to Setup > Import/Export > Import CSV Records.
6. Review the message in the Welcome to the Import Assistant window, and then click the **Get Started!** button.

Step 1: Scan and Upload CSV File

7. From the **Import Type** dropdown list, select **Relationships.**
8. From the **Record Type** dropdown list, select **Customers Only**.
9. Leave the default values for Character Encoding, CSV Column Delimiter, and CSV File(s) (one file to upload).
10. Click the **Select**… button and browse to your desktop to locate the **file OneWorld Customers Industry_dups.csv.** Select this file and click **Open**.
11. Click the **Next** button to go to **Step 2** of the Import Assistant.

Step 2: Import Options

12 On the **Data Handling** Step > In the **Import Options** section, select **Add**

a. In the Advanced Options review the options, but do NOT select any.

b. Prevent Duplicate Records can be useful; however, **for purposes of another exercise, we do NOT want to prevent duplicates.**

13 Click **Next.**

14 Step 3 is skipped, since we are only importing in a single file

Step 4: Field Mapping

15 There are three columns to work with on the Mapping page:

a. **Left column:** Your fields, from the .csv import file

b. **Central column**:

i. Displays the results of the mapping between your fields and NetSuite fields

ii. Displays a pencil icon define a field value or default.

c. Right column: NetSuite fields available

i. Some NetSuite fields are found in sub folders which need to be expanded

16 In the **Central column**, map the remaining fields.

a. Click the **pencil** icon on any line or blank lines, on the left side of the column, to define the value for that entry.

b. Click **Done** after each selection.

CSV Import Fields: Left side	NetSuite Fields: Right Side
Blank, Select Default = **No**.	Individual (Req)
Select Provide Default Value radio button and choose US Dollar or USA	Currency
Select Provide Default Value radio button and choose Parent Company	Subsidiary (Req)y
Select Provide Default Value radio button and Alternate Price 1	Price Level
Select Provide Default Value radio button and Amy Nguyen	Sales Rep

17 Go to the **right column**, **NetSuite Fields**, close the **Customer Folder**.

a. Open the **Customer Address** folder and then open the **Customer Address 1** sub folder to view the fields available for mapping.

18 In the **Center column**, **select a blank row**, don't overwrite existing values.

a. **Select values from the NetSuite Fields (right column**) first if a value needs to be defined for the CSV Import Fields (left column).

CSV Import Fields: Left side	NetSuite Fields: Right Side
Blank, Default Billing = **Yes**	Address 1: Default Billing In the pop-up window, click OK. NetSuite Adds the following field automatically
Billing Country	Customer Address 1: Country (Req) is added for us. – (Note: Country field is required, it determines the custom form to be used for each address)
	Manually add the following:
Billing Address 1	Address 1: Label
Billing Address 1	Address 1: Address 1
Billing Address 2	Address 1: Address 2
Billing City	Address 1: City
Billing State/Province	Address 1: State
Billing Zip	Address 1: Zip

19 When finished, click **Next** to go to **Step 5** of the Import Assistant.

Step 5: Save Mapping and Start Import

20 Enter a name in the **Import Map Name** field, to save and reuse the defined field mapping. For example, enter Standard Customer Lists.

21 In the **Description** field, enter a longer description: e.g. "New Customers".

22 Click **Save & Run**.

23 Check the import status at: **Setup > Import/Export > View CSV Import Status.**

24 Click the **Refresh** button. The goal is to have the Status Complete, Percent Complete 100%, and Message: "12 of 12 records imported successfully".

25 **Note (Correcting errors):**

a. Click the **CSV Response link** and open the **results.csv** file.

b. First column displays the errors. Note the errors, close the results.csv file. Open csv file previously downloaded, correct the errors and try again:

c. Use the previously saved CSV Import to re-import your customers:

d. Navigate to **Setup > Import/Export > Saved CSV Imports**.

e. Click on your saved CSV Import List link.

f. Upload the corrected “OneWorld Customers Industry_dups.csv” file.

g. Repeat Steps 7- 11. (Correct the field mapping if needed).

h. Click Save and Run (select OK to override the existing saved import).

i. Navigate to Setup > Import/Export > View CSV Import Status to view the status of your new import.

j. Click the Refresh button until the status is Complete.

26 **End.**

27 For reference, this is what the mapping should look like

Field Map		
Account	⇔	Customer : Account
Category	⇔	Customer : Category
Company Name	⇔	Customer : Company Name
USA	⇔	Customer : Currency
Industry	⇔	Customer : Industry
Email	⇔	Customer : Email
Status	⇔	Customer : Status (Req)
Fax	⇔	Customer : Fax
Inactive	⇔	Customer : Inactive
No	⇔	Customer : Individual (Req)
Phone	⇔	Customer : Phone
Alternate Price 1	⇔	Customer : Price Level
Amy Nguyen	⇔	Customer : Sales Rep
Parent Company	⇔	Customer : Subsidiary (Req)
Yes	⇔	Customer Address 1 : Default Billing
Billing Address 1	⇔	Customer Address 1 : Label
Billing Address 1	⇔	Customer Address 1 : Address 1
Billing Address 2	⇔	Customer Address 1 : Address 2
Billing City	⇔	Customer Address 1 : City
Billing Country	⇔	Customer Address 1 : Country (Req)
Billing State/Province	⇔	Customer Address 1 : State
Billing Zip	⇔	Customer Address 1 : Zip

Exercise 03: Update Customers Using an Import

Time: 10-15 minutes

Scenario: You have completed a customer import. Now you would like to add in Annual Revenue information.

In this exercise:

- Use the CSV file we provide
- Use the CSV Import Update feature to correct this problem.
- **Please note that this exercise has an intentional error built in. At the end, see if you can figure out why. You do NOT have to fix it.**

Review the list of customers

1. Navigate to **Lists > Relationships > Customers**.
2. Confirm that the View filter is set to All at the top of the screen.
3. Scroll all the way to the right; note that there is no information in the Annual Revenue field.

Access Import Assistant

4. Download to desktop OneWorld Customers Annual Revenue Add.csv file from https://tinyurl.com/nsowcustAdd and place on your desktop.
5. Navigate to Setup > Import/Export > Import CSV Records.
6. If displayed, review the message in the Welcome to the Import Assistant window and then click the Get Started! button.

Scan & Upload CSV file

7. From the Import Type dropdown list, select Relationships.
8. From the Record Type dropdown list, select Customers Only.
9. Leave the default values for Character Encoding, CSV Column Delimiter, and CSV File(s) (one file to upload).
10. For the CSV File(s) and select One File to Upload.
11. Then go click the Select button for and browse to your desktop to locate the file OneWorld_Customers_AnnualRevenue_Add.csv. Select this file and click Open.
12. Click the Next button.

Import Options

13. In the Import Options section, select Update. Do not select any Advanced Options.

14 Click **Next**.

a. **Note:** File Mapping automatically skipped because you are importing only one .csv file.

Field Mapping – Central column

15 In the Central column, map the remaining fields. You will notice there are noticeably less fields than our last import. We only need to import the fields that we are updating

CSV Import Fields: Left side	NetSuite Fields: Right Side
Company Name	Customer: Company Name
Annual Revenue	Customer: Annual Revenue
Inactive	Customer: Inactive
ON A BLANK LINE Name (pull from left-hand column)	ON A BLANK LINE Customer: Customer ID (pull from right-hand column)

- **Tip: If Customer: Annual Revenue is not available you may have set up the custom list incorrectly**.
  - Hover over **Customization > Lists, Records & Fields > Entity Fields** and open in a new tab
  - Click on the **Annual Revenue** field and ensure that **Show in List** is selected

16 Click Next.

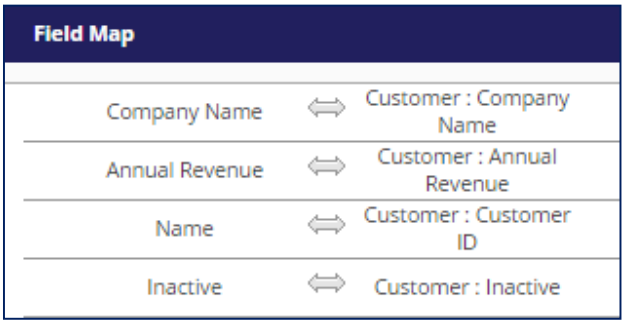
17 Enter a name in the Import Map Name field, Customer Update, so that the field mapping you just defined can be saved and re-used later.

18 Click Save & Run. The update will begin.

19 Go to Setup > Import/Export > View CSV Import Status.

20 Click the Refresh button until you see the final results. The goal is to have the Status as Complete, the percent complete 100%, but you may not have 11 of 11 records imported or another number.

21 For your reference, this is what the mapping should look like.



Identifying errors

22 See if you can identify the errors and how you might fix them and write here.

a. What is the Error?

b. What is a possible resolution?

23 End.

Exercise 04: Create Vendor Import Template (optional)

Time: 3-5 minutes

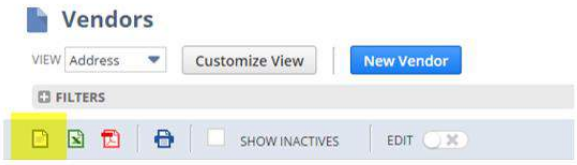
Scenario: You have a list of your vendors available from your existing software application. After working with the list, you are now ready to import this list into the NetSuite application. You need to build a template.

In this exercise:

- Create a template to use to bring in your list
- Use the Import Assistant provided by NetSuite
- **Test your .csv file with just a few records** (only three or four) ensuring the file is set up correctly.

Create an Import Template for Vendors

1. Navigate to **Lists > Relationships > Vendors**.
2. In the top of the page make sure that View is set to Address
3. Once the list* displays, click the Export-CSV icon in the top portion of the page.



*There may not be any names in the list. This is acceptable.

4. Save to your desktop or a folder you have created.
5. Optional: You could repeat the process to make a template for partners or any other type of relationship record.
6. Use this newly-created template to import in a test batch of vendors, maybe 1 or 2. Fill in the information for the following columns.
    a. If displayed, do not enter anything in Internal ID
    b. Fill in a **Name**
    c. Enter a street address for **Billing Address 1**
    d. Optional, enter a suite number in Billing Address 2
    e. Enter the city for **Billing City**
    f. The state or province in **Billing State/Province**
    g. Enter the **Zip Code**

h. Enter the **Billing Country**

i. Do not enter anything under the Billing **Address**

j. Do not worry about Date Created and Last Modified

7 Access the Import Assistant, navigate to **Setup > Import/Export > Import CSV Records**.

a. **Import Type:** Relationships

b. **Record Type:** Vendors

c. Leave the defaults for Character Encoding and CSV Column Delimiter

8 CSV File(s)

a. Leave **One File to Upload** selected

b. Go down and click the **Select** button

c. Find your CSV saved template and click **Open.**

9 Click Next.

10 For Import Options, click Add.

11 Click Next.

12 You are now on the Field Mapping. In the Central column, map the remaining fields. You will notice there are noticeably less fields than our last import. Use the pencil icon to provide default values.

CSV Import Fields: Left side	NetSuite Fields: Right Side
Blank, Select Default = No.	Vendor: Individual (Req)
Blank, Select Default Value = Parent Company	Vendor: Primary Subsidiary (Req)

13 Go to a blank line and add the following:

CSV Import Fields: Left side	NetSuite Fields: Right Side
Name	Company Name

14 Go to the right column, NetSuite Fields, close the Vendor Folder.

a. Open the **Vendor Address** folder and then open the **Vendor Address 1** sub folder to view the fields available for mapping.

15 In the **Center column**, **select a blank row**, don't overwrite existing values.

a. **Select values from the NetSuite Fields (right column**) first if a value needs to be defined for the CSV Import Fields (left column).

CSV Import Fields: Left side	NetSuite Fields: Right Side
Blank, Default Billing = Yes	Address 1: Default Billing In the pop-up window, click OK. NetSuite Adds the following field automatically
Billing Country	Vendor: Address 1: Country (Req) is added for us. – (Note: Country field is required, it determines the custom form to be used for each address)
Billing Address 1	Address 1: Label
Billing Address 1	Address 1: Address 1
Billing Address 2	Address 1: Address 2
Billing City	Address 1: City
Billing State/Province	Address 1: State
Billing Zip	Address 1: Zip

16 Click Next.

17 Enter a name in the Import Map Name field, e.g. Vendor, so that the field mapping you just defined can be saved and re-used later.

18 Click Save & Run.

19 Go to Setup > Import/Export > View CSV Import Status.

20 Click the Refresh button until you see the final results. The goal is to have the Status a**s Complete;** the percent complete **100** and the number of successful imported records.

21 If you need to troubleshoot, you may want to look at your mapping. Here is the correct mapping:

a. **Setup > Import/Export > Saved CSV Imports**

b. Click the **View** link for your vendor import to view the mapping. Please note that you may or may not see an additional field that reads *Default Work Calendar* and you may ignore it.

Field Map		
Name	⇔	Vendor : Company Name
No	⇔	Vendor : Individual (Req)
Parent Company	⇔	Vendor : Primary Subsidiary (Req)
Yes	⇔	Vendor Address 1 : Default Billing
Billing Address 1	⇔	Vendor Address 1 : Label
Billing Address 1	⇔	Vendor Address 1 : Address 1
Billing Address 2	⇔	Vendor Address 1 : Address 2
Billing City	⇔	Vendor Address 1 : City
Billing Country	⇔	Vendor Address 1 : Country (Req)
Billing State/Province	⇔	Vendor Address 1 : State
Billing Zip	⇔	Vendor Address 1 : Zip

22 End.

Solution: Exercise 03: Update Customers Using an Import

Click the **Refresh** button until you see the results. The goal is to have the **Status** as **Complete**, the percent complete **100**%, and the message may read: **10 of 11 records imported successfully"**.

See if you can identify the errors and how you might fix them and write here.

What is the Error? Values in our CSV file do not match values in NetSuite, such as a company name or annual revenue.

What is a possible resolution? Research and if necessary, correct the name in the CSV file

Activity: Data Migration

Can you answer the following questions?

- How can you create a .csv template to import records in?
- True or False: Scrub your data before importing
- True or False: You cannot import in contacts and customers together, in one file
- True or False: Consider running imports during off-peak hours

CSV Import Enhancements

With each release, NetSuite provides updates to import capabilities:

CSV Import Support for Timesheets and Time Entry Records:

- Enables you and your employees to track hours in a CSV-capable editor and then import the data into NetSuite
    - The Timesheets feature is a hidden feature that Support can make visible and then enable the feature at Setup > Company > Enable Features > Employees subtab
- In the import assistant, first select Employees as the Import type and then you can select the Record Type
- Review the differences between importing with Time Tracking versus Timesheets – Please refer to SuiteAnswers and release notes

CSV Import Enhancements to Support Multi-Book Accounting:

- Journal Entry and Intercompany Journal Entry record imports are being enhanced to support the import to a specific book, necessary for the Multi-Book Accounting feature.

CSV Import Impact of Address Enhancements – the enhancements have caused changes to entity, transaction, and location imports:

- Country field is now required; it determines the custom form to be used for each address
    - Entity, transaction and location records now require values to be set for the Country field
    - If your CSV file does not include a column with values for the Country field, the Country field is mapped to a default value of US.
    - You can change this default on the Import Assistant Field Mapping page

Additional Resources

NetSuite Help Center:

- CSV Imports Guide

SuiteAnswers Learning Center

- New Feature Training
- CSV Import Support for Timesheets and Time Entry Records
- CSV Import Enhancements to Support Multi-Book Accounting
- CSV Import Impact of Address Enhancements
- Data Migration
- Administration/Data

Data Integrity

About this Module

Daily, data is populating our account and you should be concerned with:

- Reducing duplicate records
- Providing the most current data to my users
- Ensuring that the data is correct

1. Search and manage duplicate records
2. Perform mass updates to records
3. Use inline editing to modify records

Duplicate Detection & Duplicate Resolution

Define the Duplicate Detection criteria:

- The defined search criteria are used to identify potential duplicates
- NetSuite searches for duplicates of customers, contacts, partners, or vendors

Use Entity Duplicate Resolution to choose how to **handle duplicate search results**:

- Reviews Contacts, Customers, Vendors, and Partners
- Define Merge Type
- Merge information from duplicates into a single master record

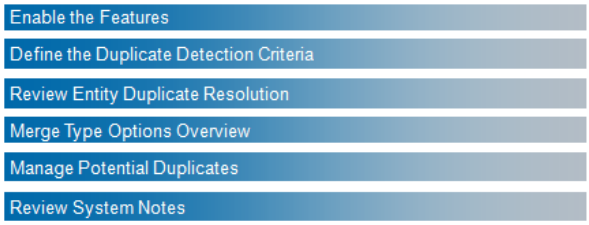
- If merged record and duplicate record have different data for the same field, the data in the master record is saved

Addressing False Duplicates

Potential duplicate records occur with either matching or similar information; minimize false duplicates by reviewing duplicate detection criteria:

- False duplicates occur when multiple contact records from one company use same domain name in their email addresses
- Review the evaluation of the email field on a **company** versus **contact** record; this is domain versus full **email evaluation**
    - **Customer:** Flagged as a duplicate when domain name portion of the address matches, if the domain name is not listed
    - **Contact:** Flagged only as a duplicate if the entire email address matches
- Use the NetSuite "**Other Relationships**" function:
    - Manage an entity that may have multiple roles such as partner who is also a vendor
    - Define this on the entity record

Walkthrough: Inline Editing and Duplicate Detection



Use Case: As the Administrator, I need to enable the tools and then start working with managing potential duplicates; I want to provide users with the most current and correct data.

Enable Features

The administrator enables the following Data Management features:

- **Go to Setup > Company > Enable Features**
- On the **Company** subtab, **Data Management** section, ensure that the following features are selected:
    - **Inline Editing**: facilitates updating records while viewing a list of those records
    - **Duplicate Detection & Merge**: allows duplicate detection of various entity records and management of the duplicates
- Click **Save**

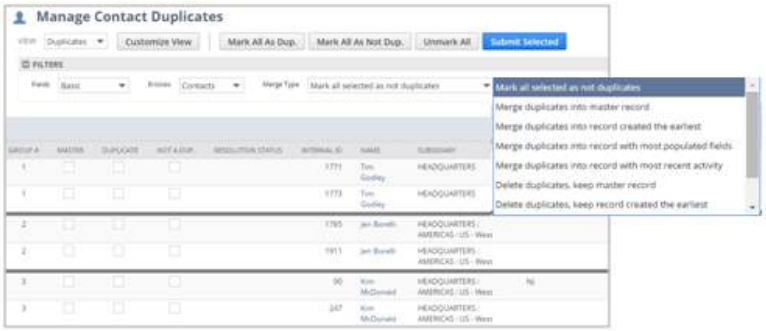
Define Duplicate Detection Criteria

Go to **Setup > Company > Duplicate Detection** to set the evaluation criteria for detecting potential duplicates:

- **Detection** subtab: choose which entities to review
  - Select standard and custom field to be evaluated
    - To make a **custom entity field available** as criteria in duplicate detection, check the **Store Value** check box
  - Define saved search parameters, using “and” logic
- **Excluded Domains** subtab
  - Enter or remove the domains you want to exclude from domain only duplicate detection matching
- **Other Preferences** subtab:
  - Show Duplicate Warning Popup on Records
    - Check this box if you want to present a popup warning when a user clicks Save while the cursor is in a duplicate criteria field.
  - Resolve Duplicates with Conflicting Login Access
    - If two duplicate records each have login access, but the records have different email addresses, they are considered to have conflicting login access.
    - Choose how you would like to resolve duplicate records that have conflicting login access:
      - Manually - Duplicate records with conflicting login access are not merged. You must manually remove the login access of one of the records before they can be merged.
      - By deleting the duplicates' access - When merging records, the login access of duplicate records is deleted when it is merged into the master record.
- **Save the criteria**; it now will always run in the background

Review Entity Duplicate Resolution

Review the search results displaying the listing of potential duplicates:



- Navigate **to Lists > Mass Update > Entity Duplicate Resolution**
- Ensure that the **View** is set to **Duplicates**
- Then use the **Filters** at the top of the page
  - **Fields:** choose either Basic or Match Fields
  - **Entities:** select the Entities to review, e.g. Contacts
  - **Merge** Type: define the action to be taken; more information following
- Use the **Mark All as Dup.**, **Mark All as Not Dup**. or **Unmark A**ll buttons as required when you review the potential duplicates

Merge Type Options Overview

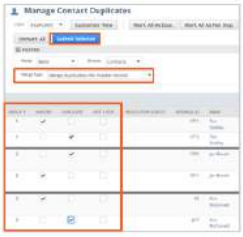
This chart provides more information on the action performed with the different Merge Type options:

- This chart comes from the Help topic on *Entity Duplicate Resolution* and is included in your workbook.

Option	Description
Mark all selected as not duplicates	This leaves all records without any changes.
Merge duplicates into master record	This merges all information from the duplicate records into empty fields in the master record. If information is entered in field on both the master and the duplicate, the information on the master record remains the same.
Merge duplicates into record created the earliest	This saves the record with the earliest date in the Created column and places information from selected duplicated records into any empty fields on the saved record.
Merge duplicates into record with most populated fields	This saves the record with the highest number in the Fields column and places information from selected duplicate records into any empty fields on the saved record.
Merge duplicates into record with most recent activity	This saves the record with the most recent date in the Last Activity column and places information from selected duplicate records into empty fields on the saved record.
Delete duplicates, keep master record	This saves only the record you selected as the master and deletes all records you selected as duplicates.
Delete duplicates, keep record created the earliest	This saves the record with the earliest date in the Created column and deletes all other selected records in this group.
Delete duplicates, keep record with most populated fields	This saves the records with the highest number in the Fields column and deletes all other selected records in that group.
Delete duplicates, keep record with most recent activity	This saves the record with the most recent date in the Last Activity column and deletes all other selected records in the group.
Make duplicates subrecords of master	This saves the record you designate as the original, master record and converts those you marks as duplicates into its subrecords.

Manage Potential Duplicates

Determine the action to take, to properly manage the records:



- Select **Master, Duplicate or Not a Dup** checkbox for each record shown
  - You can also determine if you want to use the buttons **Mark All as Dup.** or **Mark All as Not Duplicate**
- Choose the **Merge Type** filter for the appropriate action
  - Merge Options:
    - Merge duplicates into master record
    - Merge duplicates into record created earliest
    - Merge duplicates into record with most populated fields
    - Merge duplicates into record with most recent activity
  - Delete Options
    - Delete duplicates, keep master record
    - Delete duplicates, keep record created earliest
    - Delete duplicates, keep record with most populated fields
    - Delete duplicates, keep record with most recent activity
  - Convert duplicates into sub-records of the master record
- Click **Submit** Selected – This action is irreversible

Review Duplicate Resolution Status

- NetSuite navigates to the **Duplicate Resolution Status** page that shows your results

Review System Notes

NetSuite always tracks each time a record is created and/or changed:

On the System Information subtab, the System Notes sublist, you can review the merge of the record:

- Date and time stamped
- User identified
- Merge details provided

Walkthrough: Mass Updates

- Perform a General Update
- Perform a Specific Update
- Merge Large Numbers of Records
- Mass Update to a Permission on a Custom Role

Use Case: We want to use mass updates to:

- Assign a supervisor to multiple employees
- Reassign a sales rep to different customers
- Set rules to merge large number of records
- Change a permission on a custom sales role, view only access of a Cash Sale

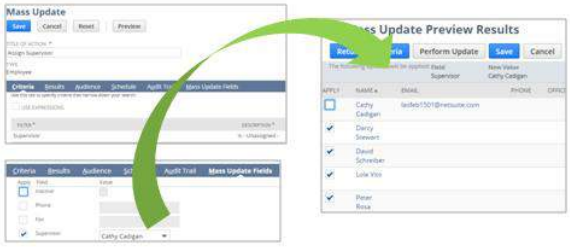
The Mass Update feature is an alternative way to update records. You can also update records using the Import Assistant.

Perform a General Update

Use Case: Assign supervisor to employee records without a supervisor; perform update immediately

Navigate to **List > Mass Update > Mass Update**:

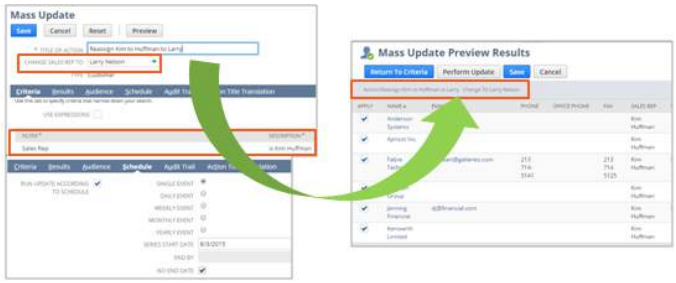
- Expand **General Updates** and select the record, e.g. Employee
- Enter in the **Title of Action**, e.g. Update Supervisor
- Define the **Criteria – Filter**, e.g. any of Supervisor Unassigned
- Go to **Mass Update Fields** subtab:
  - Check **Supervisor**
  - Select **Value**, e.g. Cathy Cadigan
- **Preview** to check / uncheck Apply updates to records
- **Perform Update** and view the confirmation
- Click **OK**



Perform a Specific Update

Use Case: Reassign sales territories, but schedule for a future date.

- Go to **Lists > Mass Update > Mass Updates**
- Expand **Sales Force Automation** and select **Change Territory Assignment**
- Enter in the **Title of Action**, e.g. Re-org Sales Territories
- Select **Change Territory To** – Default Round-Robin
- Define the **Criteria – Filter**: Territory
- Go to **Schedule** subtab
- Check **Run According to Schedule**, select **Single Event**, and set date
- **Preview** to check / uncheck **Apply** updates to records
- **Save**



Merging Large Numbers of Records

Using the Mass Update functionality, Administrators can set rules to merge an unlimited number of records:

- Go to **Lists > Mass Update > Mass Updates** and expand **Duplicate Resolution**
- Select the **Entity**, e.g. Customers

- In the **Mass Update** page:

  - Enter in **Title of Action**
  - Select the **Operation**
  - Select the **Master Selection Mode**
  - Select the **Record Selection Mode**
- Continue defining the update per your requirements and user criteria to control the search results.

Mass Update to Permissions on a Custom Role

A specialized mass update to add, remove, or change the level of a permission for multiple, custom roles at the same time, instead of editing each role individually:

- This mass update can only be applied to custom roles; do this instead of editing each role individually
- This mass update **is not available** to customized Customer Center, Employee Center, Partner Center, or Vendor Center roles.

Navigate to List > Mass Update > Mass Update:

- Expand Roles & Permissions and select Add/Edit Permission on Roles
- Enter in the Title of Action
- Select Permission and then Level, e.g. Cash Sale set to View
- Define the criteria, e.g. Center Type = Sales Center
- Continue defining the update per your requirements and user criteria to control the search results

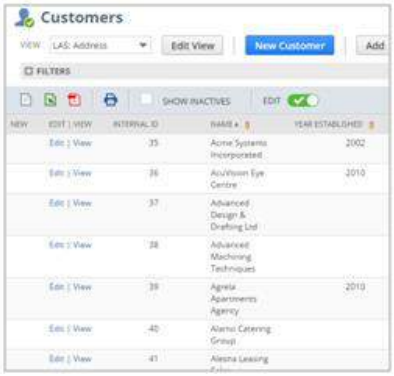
Walkthrough: Use Inline Editing

Use Inline Editing in a List

Use Case: Quickly update a list of customers to add in year established

Inline Editing at List Level

When viewing any list of records, utilize the Edit switch to use inline editing; for example, updating customer records with Year Established:



- Go to Lists > Relationships > Customers, set the View, e.g. Address
- Click the **Edit** icon to turn it on inline editing 

- Columns with the pencil icon are available for editing
- Go to the column to edit, select the line to edit
    - You may use the ctrl key or shift key to select multiple lines or a range of lines
    - Make your changes and click out
- When done, click the **Edit** icon to turn off inline editing 

Now It's Your Turn

Use Case/Scenario: Take some time to ensure data integrity:

- Check for potential duplicates, since we have done some imports
- Schedule an update to reassign customers to a new sales rep
- Create a saved search for employee records and then use that with inline editing
- Work with a mass update to perform a calculation - *optional*
- Allow 20 - 30 minutes

Exercise 01: Identify and Merge Duplicate Records

Time: 3-5 minutes

Scenario: The Duplicate Detection tool facilitates data integrity as you in your NetSuite account. As a best practice, you should check for duplicate records on a regular basis to protect the integrity of your data.

In this exercise:

- Define Duplicate Detection Criteria
- Go to potential duplicates and review page filters
- Review potential duplicates.

Define Duplicate Detection Criteria

1. Navigate to **Setup > Company > Duplicate Detection**.
2. The following settings should be confirmed and updated if required, on the **Detection** subtab.
    a. Detect Customer Duplicates: **Check**
    b. Customer Field to Match On: **Email (domain only**)
    c. Detect Vendor Duplicates: **Check**
    d. Vendor Field to Match On: **Email (domain only)**
    e. Detect Partner Duplicates: **Check**
    f. Partner Fields to Match On: **Email (domain only)**
    g. Detect Contact Duplicates: **Check**
    h. Contact Fields to Match On: **Email (full)**
3. Go to the **Other Preferences** subtab:
    a. Check **Show Duplicate Warning Popup on Records** to alert users that they may be entering a duplicate record.
    b. Review field help for **Resolve Duplicates with Conflicting Login Access**
4. Do not change any other settings.
5. Click **Save**. Read the warning in the pop-up window and click **OK.**

Review potential duplicates

6. Navigate to **Lists > Mass Update > Entity Duplicate Resolution**.
7. At the top of the page, open the **Filters**
8. Select **Match Fields** from the Fields dropdown list.
9. Then select **Customers** from the **Entities** dropdown list. The customers with potential duplicate fields, based on defined criteria, will display.

Manage potential duplicates

10. Define that all records are Not Duplicates; in this case, we do NOT have any true duplicates.
    a. Click the **Mark All As Not Dup** button
    b. Confirm that the Merge Type filter is set to **Mark all selected as not duplicates**
11. Click **Submit Selected.**
12. The Duplicate Resolution Status page displays. Click the **Refresh:**
    a. The Status shows a green checkmark
    b. # of Entities and # Resolved are the same
    c. # Failed is 0
13. **End.**

Exercise 02: Schedule a Mass Update

Time: 3-5 minutes

Scenario: Data integrity may also involve updating a field in many records.

In this exercise:

- Schedule a mass update to change the sales rep of existing customers to a new sales rep on a specific date.

1. Navigate to **Lists > Mass Update > Mass Updates** to display the Mass Update page.
    a. Open **Sales Force Automation**.
    b. Select **Change Sales Rep Assignment**.
2. Enter T**itle** of Action as **Sales Reorg**
3. In the **Change Sales Rep** to field, select **Bob Smith** from the dropdown list.
4. Under the **Criteria** subtab, the **Filter** sublist and select **Status**
    a. A **Mass Update** popup window displays. Select any of **Customer-Closed Won** and **Set**
5. Click the **Schedule** subtab.
    a. Check the **Run Update According To Schedule** box.
    b. Choose **Single Event.**
    c. **Series Start Date**: Select December 31st of the current year.
6. Click **Save**. This mass update will now run on the designated date.
7. You can go to **Lists > Mass Update > Saved Mass Updates** to view your update.
    a. You could click on the name of the update to edit it.

    b. Click on the **Preview** link to note how many customers will be reassigned.
    c. Click **Cancel**
8. **End.**

Exercise 03: Create a Saved Search for a List View

Time: 3-5 minutes

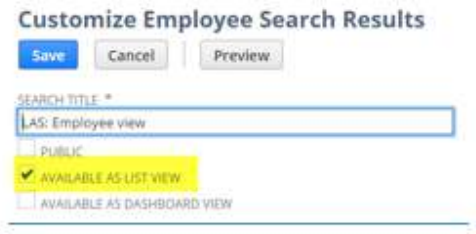
Scenario: You would like to have a specific view of a list of employees.

In this exercise, you:

- Create a saved search that defines the columns when viewing a list of employees
- You will use this view in the following exercise to use inline editing.

Access a list of employees and start customizing the view

1. Navigate to **Lists > Employees > Employees.**
2. Go to the top of the page and set the **View** filter to **All.**
3. Click the **Customize View** button, top-left side of the page.
4. The **Customize Employee Search Results: Custom Employee All View** page displays.
    a. Enter a **Search Title** for the search – e.g. XXX: Employee List (XXX your initials)
    b. Click **More Options** to access all search features.
    c. **Tip:** To make your saved searches easier to find later, add your initials to the beginning or end of the name – e.g. ABC - Employees with new Job Titles
5. Be sure the **Available as List View** box is checked.



Define criteria and results

6. Go to the **Criteria** subtab > **Standard** sublist, set the following **Filter** criteria:
    a. Select **Subsidiary** is any of **Parent Company** and click **Set**
    b. Select **Login Access is NO** (false) and click **Set**. It will then display the Description "is false".
7. Click the **Results** subtab click **Remove All**
8. Click the **Add Multiple**

9. Resize the pop-up window, to see the vertical scroll bar, and select the following by using the Ctrl key on your keyboard; click **Add**:

    a. Division

    b. Email

    c. Job Title

    d. Login Access

    e. Name

    f. Phone

    g. Subsidiary

Preview the search

10. Click the **Preview** button to check the results. Your preview results should a list of names, with the columns you specified.

11. Click the **Return to Criteria** button to refine your search criteria or change the order of the columns for your results, if needed.

12. Click **Save & Run** when you are done to save the results.

13. Go to **Lists > Employees > Employees** and at the top of the page change the **View** filter to select the saved search that you just created.

14. **End.**

Exercise 04: Set Up and Use Inline Editing

Time: 3-5 minutes

Scenario: Chatham Company offices are moving. Some employees are getting new phone extensions. Inline editing can facilitate this.

In this exercise:

- Confirm that the Inline Editing feature is enables
- Use inline editing do input phone numbers

1. Navigate to **Setup > Company > Enable Features** and confirm that you are on the **Company** subtab.
2. In the **Data Management** section, confirm that **Inline Editing is enabled**.
3. Click the **Save** button.
4. Use inline editing; navigate to **Lists > Search > Saved Searches.**
5. Find the Saved Search (employee search) that you created in the previous exercise. If necessary open the filters and **be sure to set the filters ALL.** You should be able to find the Employee List Saved Search easily if you remembered to save it with your initials as part of the title.
6. Click the **View** link to view the search results.
7. In the List header, switch the **Edit toggle to On**. The system may display a tutorial pop-up window. If so, close it by clicking the "X" in the bottom-right.
    a. A pencil icon displays at the top of the columns to allow you to make changes directly to the column fields.
8. Go to the **Phone column**. Click on the first employee. Add or change their phone number to 8885551212. Click outside of the phone number field to register the change.
9. When finished with the direct list editing, turn off **Edit** to disable inline editing.

Use the system notes validate the changes made

10. Click the **View** link next to one of the employees whose information that you changed.
11. On the employee's record, click the **System Information** subtab. Under **System Notes**, look for the record that shows the employee's phone number was changed: Old Value and New Value both show.
12. Click **Cancel.**
13. **End.**

Exercise 05: Perform Mass Update with Calculation (optional)

Time: 3-5 minutes

Scenario: Updates may include updating fields with a formula.

In this exercise:

- Perform a mass update with a calculation

1. Navigate to **Lists > Mass Update > Mass Updates** to display the Mass Updates page and open **General Updates**. Select **Inventory Item.**
2. Under the **Results** subtab, add **Purchase Price** to the list to display and click **Add**.
3. Go to the **Mass Update Fields** subtab select the following.
    a. Scroll down on the page and find Purchase Price, select the Apply check box.
    b. Tab over to the far, right-hand side to the Formula column, click on the Set Formula icon.

4. In the pop-up window, do the following:
    a. Select **Purchase Price** from the **Field** dropdown; it will display as **{cost}** in the formula box.
    b. After **{cost}** type in ***2**.
    c. This calculation doubles the purchase price for your inventory items.
    d. Click **Set**.
5. Click **Preview** (Preview enables you to see if you have entered the formula correctly.)
6. You should see Printer Cables displayed with the Purchase Price and New Purchase Prices.

APPLY	NAME ▲	DISPLAY NAME	DESCRIPTION	TYPE	BASE PRICE	PURCHASE PRICE	NEW PURCHASE PRICE
☑	Printer Cables		Printer Cables 6'	Inventory Item	25.00	5.75	11.5

7. Click Cancel.
8. **End.**

Activity: Data Integrity

Review these questions after doing the exercises:

Can you answer the following questions?

- True or False: Merges are reversible.
- True or False: Inline Editing allows updating information in any column, when viewing a list of records
- How should we evaluate email addresses on contact records to minimize false duplicates?
- For discussion: How often do you think you will review the results of Entity Duplicate Resolution?

Additional Resources

NetSuite Help Center:

- Making Mass Changes or Updates
- Using Inline Editing

SuiteAnswers Learning Center:

- New Feature Training
- Getting Started
- Administration/Data

Customization and Data Management is done, next ERP Part 1

This is the end of the book, the appendix follows

Workbook Appendices

The following section is for your reference.

You must first enable Customer Support to do this exercise:
Setup > Company > Enable Features > CRM > Customer Support and Service

Optional Exercise: Create Dependent Dropdowns

Time: 20-30 minutes

Scenario: Chatham Company supports users on various Operating Systems. The Support Rep identifies which Operating system the user is using and then they follow with targeted questions about which operating system-specific Browser they are using.

Since not all Browsers work with all Operating Systems, Dependent Dropdowns are used on the Support Case record to help the Support Rep with this identification task.

Four custom objects are created in this exercise to support the scenario:

- Create a custom list of Operating Systems.
- Create a custom record type containing all the valid combinations of Operating Systems and Compatible Browsers.
- Create a custom List/Record CRM field that points to the list of Operating Systems.
- Create a custom List/Record CRM field that points to the custom record containing the combinations of Operating Systems and Browsers. This field becomes the dependent dropdown. The records returned are filtered based on the Operating System selection in the other List/Record CRM field.

Dependent Dropdowns allows users to make the right choices in situations where some options might not make sense if selected together.

Create a Custom List for Operating Systems (acts as a master list)

1. Go to **Customization > Lists, Records, & Fields > Lists > New**.
2. Enter **Operating Systems** in the Name field.
3. Leave **Show Options In: The Order Entered** as the default.
4. Enter the following in the Values subtab:
    a. Windows
    b. Mac
    c. Linux
5. Click **Save.**

Create Record Type containing the operating systems and compatible browsers

6. Go to **Customization > Lists, Records, & Fields > Record Types> New.**
7. Enter **Compatible Browsers** in the Name field.
8. Make sure **Include Name Field remains checked**.
9. Click **Save.**

Add Operating System Field to the Compatible Browsers record type

10. You should be viewing the record type you just saved. On the **Fields** subtab click **New Field** to add a field for the operating system.
11. Enter the following information:
    a. Label: **Operating System**
    b. ID: **_operating_system**
    c. Type: **Multiple Select**
    d. List/Record: **Operating Systems**
    e. Store Value: **check**
    f. Show in List: **check**
12. Click **Save.**

Create the combinations for operating systems and compatible browsers

13. Go to **Customization > Lists, Records, & Fields > Record Types**

14 Click the **List** link for **Compatible Browsers**

15 You should be on the Compatible Browsers List page

16 Click **New Compatible Browsers** to begin adding combinations. You will be using the following browsers while adding combinations:

a. Internet Explorer

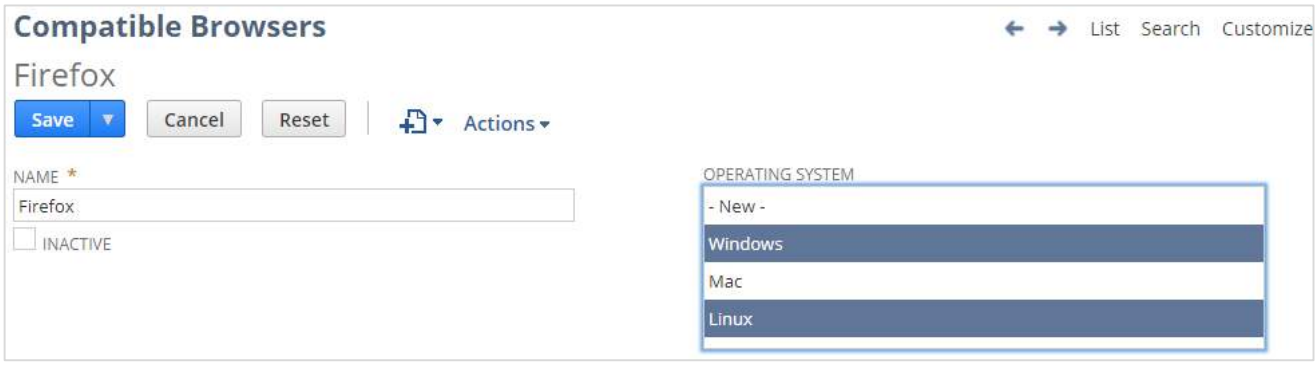
b. Google Chrome

c. Firefox

17 Enter the following information

a. Enter a browser into the Name field, e.g. Firefox.

b. Select operating system (s) from the Operating System, multi-select field. See example below.



c. Click **Save & New**

d. Keep adding records for each operating system so that you have different combinations of browsers for each.

e. Click **Save** when done.

Enable Support and then customize a case form

18 Note: We have not yet enabled Customer Support and Service, so first go to

a. Setup > Company > Enable Features

b. **CRM** subtab, **Basic** section

c. Check **Customer Support and Service**

19 Click **Save**

20 Go to **Lists > Support > Cases > New.**

21 Select **Customize Form** from the Customize link, top-right hand side of page.

22 Go to **Fields** subtab.

23 Click **New Field** button.

24 Enter the following information:

a. Label: **User's Operating System**

b. ID: **_user_operating_system**

c. Type: **List/Record**

d. List/Record: **Operating Systems**

25 Go to the **Applies To** subtab, check **Case**

26 Click **Display** subtab.

27 Enter the following information:

a. Subtab: **Main**

b. Display Type: **Normal**

c. Enter Help text: **Select user's operating system**

28 Click **Save & New**.

Create Field on a Case form for dependent list of compatible browsers

29 Enter the following information:

a. Label: **User's Browser**

b. ID: **_user_browser**

c. Type: **List/Record**

d. List/Record: **Compatible Browsers**

30 Go to the **Applies To** subtab, check **Case**

31 Click **Display subtab**.

32 Enter the following information:

a. Subtab: **Main**

b. Display Type: **Normal**

c. Enter Help text: **Select user's browser**

33 Click **Sourcing & Filtering** subtab

a. Add a filtering row on this subtab:

b. Filter Using: Operating Systems

i. This is a field on the Compatible Browsers record.

c. Compare Type: **equal**

d. Compare to Field: **User's Operating System**

ii. Compare to Field is a **field on the Case form**.

e. Click **Add.** See example below.

34 This filtering row connects the selected operating system on the case form with the operating system on the custom record. This filters the list of browsers to the selected operating system.

35 Click **Save.**

Create a New Case

36 Go to **Lists > Support > Cases > New.**

37 You should see the fields for User's Operating System and User's Browser on your Case Form. See example below.

a. These are dependent dropdowns

b. Once you choose a value in the first field User's Operating System, you will then see a list of browsers that apply to the selected Operating System.

38 Once you have confirmed the fields, click **Cancel.**

39 **End.**