

A BUSINESS SOLUTION PARTNERS WEBINAR



1 CREDIT AVAILABLE



HUSSAIN ZAIDI
CHIEF SOLUTION ARCHITECT

NETSUITE WORKFLOWS

MASTERS IN COMPUTER SCIENCE. TEACHES SOFTWARE ENGINEERING &
ARTIFICIAL INTELLIGENCE AT CALIFORNIA POLYTECHNIC UNIVERSITY POMONA

ORACLE
NETSUITE

5 STAR AWARD
2020 ★★★★★

BUSINESS SOLUTION PARTNERS

Moving Your Business Forward

ORACLE®
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We're moving businesses forward with the tech stack designed for growth.

Contact us to learn more about how we're helping companies in California, New York and across the nation achieve their goals by combining the power of Oracle NetSuite, Workday Adaptive Planning & HubSpot.

Implementations | Integrations | Custom Development | Training | Support

3 Best-In-Class Platforms - One Solution Provider With The Strategies For Your Success

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3 Best-In-Class Platforms - One Solution Provider With The Strategies For Your Success

➤ CPE Credits

Remember that you must vote in at least **three** of today's poll questions and watch for at least **50 minutes** to receive CPE credits. Our Zoom Webinar Platform reports back on your attentiveness, and we will preserve the audit trail as per the regulations of the NASBA.

- Vote In At Least 3 Polls
- Watch Attentively For 50 Minutes
- Course Certificates Will Be Delivered After Audit Review of Webinar is Completed



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**PLEASE NOTE:
CPE CREDITS ARE
ONLY AVAILABLE FOR
ATTENDEES OF THE
LIVE WEBINAR.**

**THERE IS NO CPE
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FOR VIEWING THE
RECORDED VERSION.**

NETSUITE MASTER CLASS: WORKFLOWS



<https://www.bspny.com/youtube>



Mastering The Inventory Count With Oracle NetSuite

18 views • 1 week ago



Maximizing The Bottom Line For Medical Practices

40 views • 1 month ago



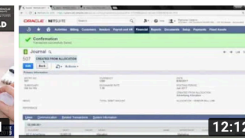
Webinar: Debriefing SuiteWorld'19 - The...

25 views • 2 months ago



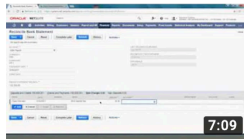
Streamlining E-Commerce In An Omni-Channel World

62 views • 4 months ago



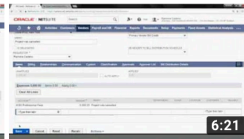
NetSuite Tutorial: How to Create an Allocation...

853 views • 7 months ago



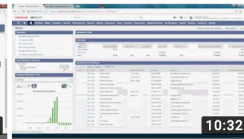
NetSuite Tutorial: How to Reconcile a Bank Account

1.8K views • 7 months ago



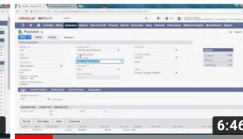
NetSuite Tutorial: How to Create and Apply a Vendor...

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NetSuite Tutorial: How to Create and Fulfill Sales...

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NetSuite Tutorial: How to Apply Customer Payments

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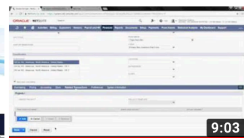
BSP 2018YEC Webinar

38 views • 8 months ago



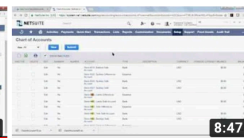
Why CFOs Choose To Implement Payment...

78 views • 1 year ago



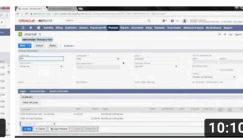
NetSuite Tutorial: How to Create & Use a Service Item

2.9K views • 2 years ago



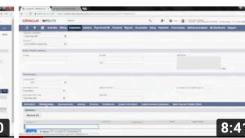
NetSuite Tutorial: How to Create a General Ledger...

6.7K views • 2 years ago



NetSuite Tutorial: How to Create a Memorized...

1.9K views • 2 years ago



NetSuite Tutorial: How to Create a New Customer...

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TODAY'S WEBINAR TEAM



CRAIG COOK
CHIEF MARKETING OFFICER



HUSSAIN ZAIDI
CHIEF SOLUTION ARCHITECT



MICHELLE CRONOLLY
ACCOUNT MANAGER - NETSUITE

➤ ASK US QUESTIONS!

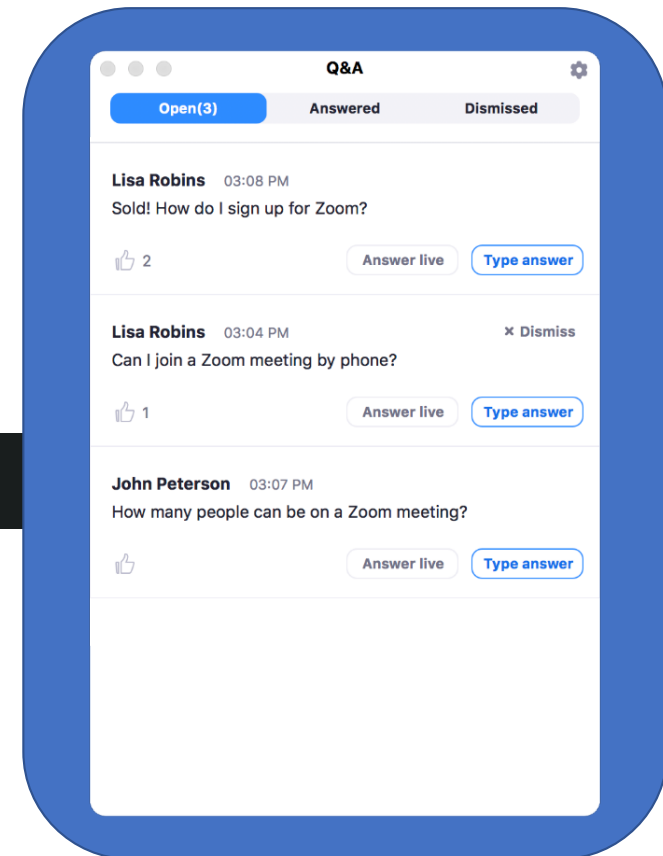
Have questions? Submit your questions in the Q&A tab on your Zoom control panel.

We may answer them live, through the Q&A interface, or at the end of the webinar.



➤ PRESENTATION + RECORDING

The recording and slides will be sent following the webinar.



Hussain Zaidi Chief Solutions Architect

As Business Solution Partners' Chief Solutions Architect, Hussain Zaidi advises clients on technology, solution design and process optimization. A vital member of the Business Development team, Hussain is responsible for ensuring that the solutions we design for our clients fit their needs, budget and bandwidth.

- 20+ years of experience in software engineering, ERP systems, electronic payments, data integration and solution architecture.
- Main focuses Oracle NetSuite cloud-based unified business management platform with extensive knowledge of NetSuite modules, add-ons and customizations.
- Holds various certifications for Oracle NetSuite, Blackline, Microsoft Dynamics and Kyriba Treasury Management Systems.
- Regular speaker at NetSuite User Group events in California and New York Tri-State area.



HUSSAIN ZAIDI
CHIEF SOLUTION ARCHITECT

Oracle NetSuite Masterclass: Workflows – Part 1

Hussain Zaidi – Chief Solution Architect

- Introduction
 - Workflow Overview
 - NetSuite SuiteFlow
 - Workflow Settings
 - Workflow Manager (Designer)
 - Workflow States, Actions & Transitions
 - Workflow Demonstration

- Orchestrated and repeatable sequence of steps or business activity
- Workflows can be used to
 - Create approval routings
 - Apply validations & checks
 - Send emails
 - Create related records
 - Direct user to appropriate forms
 - ...and more

NETSUITE MASTER CLASS: WORKFLOWS

NETSUITE'S SUITECLOUD PLATFORM

DEVELOPMENT & DEPLOYMENT



SuiteScript Programmable
Logic & UI



SuiteTalk
Cloud App Integration



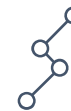
SuiteAnalytics
Built-in Business Intelligence



SuiteBuilder
Point-and-Click Customization



SuiteBundler
Cloud Application Distribution



SuiteFlow
Visual Workflow Implementation

NETSUITE MASTER CLASS: WORKFLOWS NETSUITE'S SUITECLOUD PLATFORM

- SuiteScript
 - Custom Backend Programmability
 - Custom UI
 - Javascript-based
- SuiteFlow
 - Custom Workflow
 - Decision Trees
 - Extend with SuiteScript
 - Point & Click Workflow Builder
- SuiteTalk
 - Application Integration
 - Token-based Authentication
 - Web Services APIs
- Suite Analytics
 - Report Builder
 - Dashboards
 - Saved Searches
 - SuiteAnalytics Connect: ODBC/JDBC
- SuiteBuilder
 - Custom Fields and Records
 - Custom Forms & Extensions
 - Point & Click
- SuiteBundler
 - Application Packaging
 - Rapid Deployment
 - Release Management

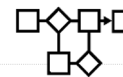
NETSUITE MASTER CLASS: WORKFLOWS CUSTOMIZATION FLEXIBILITY



SuiteApp



Custom
Forms



Custom
Workflows



Web Services
Integration



Personalize
Dashboard



Custom
Searches



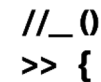
Custom
Reports



Custom
Fields



Custom
Records



Custom Code

END USER

BUSINESS ANALYST

DEVELOPER

- NetSuite SuiteFlow is a Workflow Engine embedded in NetSuite.
- It represents the Workflow Designer, APIs and Workflow Engine available to the users.
- It does not require any additional licensing from NetSuite.

- With NetSuite SuiteFlow users can
 - Rapidly accommodate changing business needs
 - No Scripting (Development) Required
 - Visually construct workflows to
 - Incorporate Manual Reviews/Approvals
 - Automate Business Processes
 - Configure Business Rules

NETSUITE MASTER CLASS: WORKFLOWS WORKFLOW MANAGER (DESIGNER)

ORACLE[®] NETSUITE | McGeever Software | Search | Help | Larry Nelson
McGeever SW OW CR/ARR - V2015.2 Standard Master - Administrator

Activities Payments Contract Renewals Transactions Lists Reports Customization Documents Setup Resource Manager Analytics

Workflow: B2B Lead Nurturing Workflow Edit

List More...

Workspace

```
graph TD; START --> WebinarInvitation[Webinar Invitation]; WebinarInvitation --> NewCustomerDiscount[New Customer Discount]; WebinarInvitation --> SalesCall[Sales Call]; NewCustomerDiscount --> FreeInOfficeConsultation[Free In Office Consultation]; FreeInOfficeConsultation --> SalesCall; SalesCall --> END;
```

State Workflow

State: Free In Office Consultation

Actions (2) Fields (0)




State Event 2





Entry

Send Campaign Email To: Current Record, Event:...


Subscribe To Record Workflow : 3rd Wave Respo...

- Workflows can be initiated when a Record is
 - Viewed
 - Created, or
 - Updated
- Workflows can run automatically on Schedule
- Workflows can be executed via SuiteScript
- Workflows can be called from another Workflow

ORACLE NETSUITE   Help  Larry Nelson
McGeever SW OW CR/ARR - V2015.2 Standard Master - Administrator

   **Activities** Payments Contract Renewals Transactions Lists Reports Customization Documents Setup Resource Manager Analytics 

New Workflow
From Template

Save  Cancel Reset


Basic Information

NAME *


DESCRIPTION

ID

RECORD TYPE *

Transaction 

OWNER

Larry Nelson 

SUB TYPES *

Journal Entry

Purchase Contract


Purchase Order

Requisition

EXECUTE AS ADMIN

☐

RELEASE STATUS

Not Running 

Not Running




Released

Testing

Initiation

☒ EVENT BASED ☐ SCHEDULED

Event Definition

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Activities Payments Contract Renewals Transactions Lists Reports Customization Documents Setup Resource Manager Analytics

New Workflow
From Template

Event Definition
☐ ON CREATE
☐ ON VIEW OR UPDATE
TRIGGER TYPE
- All -
- All -
Before Record Load
Before Record Submit
After Record Submit
CONTEXTS
CSV Import
Custom Mass Update
Offline Client

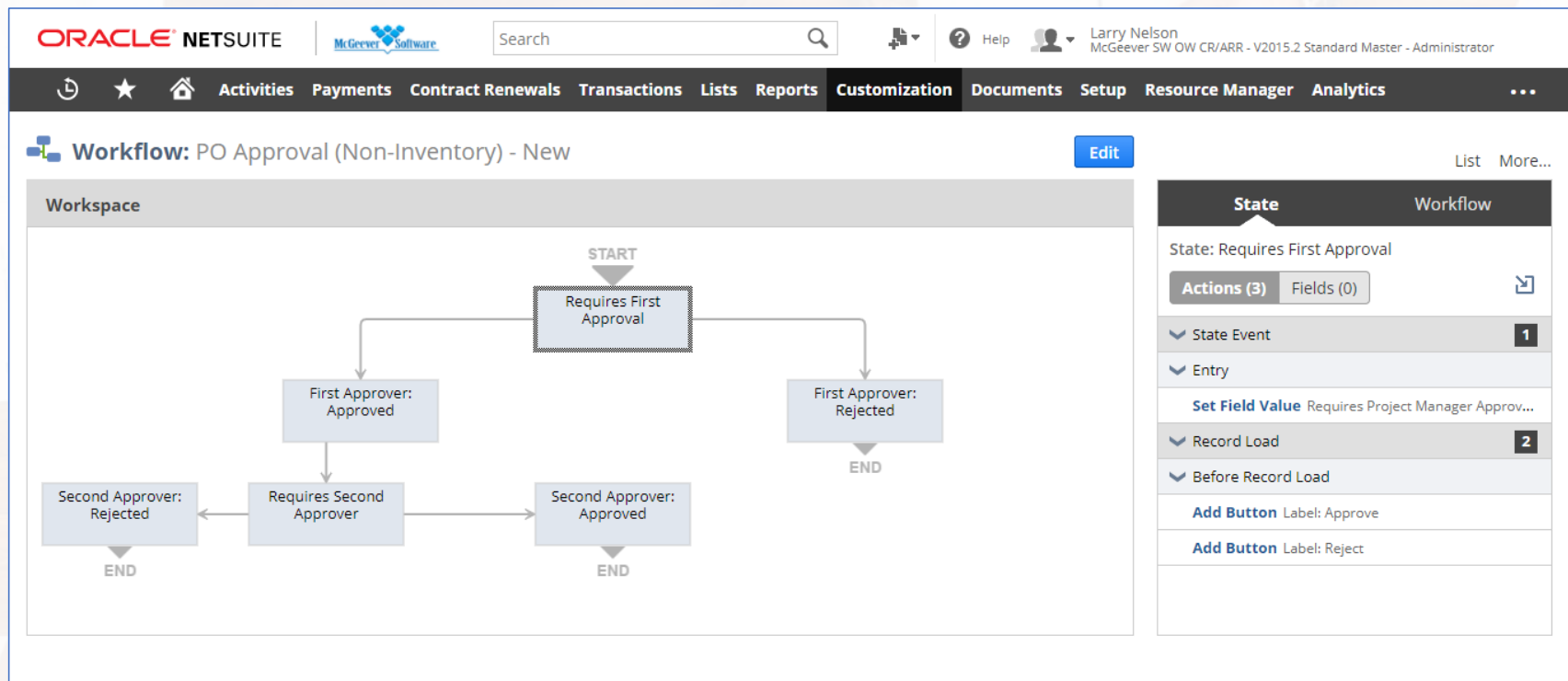
USE ☒ VISUAL BUILDER ☐ CUSTOM FORMULA
CONDITION
SAVED SEARCH CONDITION

Save **Cancel** **Reset**

- Initiation:
 - Event-based, Scheduled or via SuiteScript
- Initiation > Event-based:
 - On Create, On View or Update
- Conditions:
 - Formulas & Saved Searches
- Actions:
 - Transitions, State Changes
- Context:
 - User Interface, CSV Import, Web Service Calls...
- Triggers:
 - Before Record Load, Before Record Submit, After Record Submit

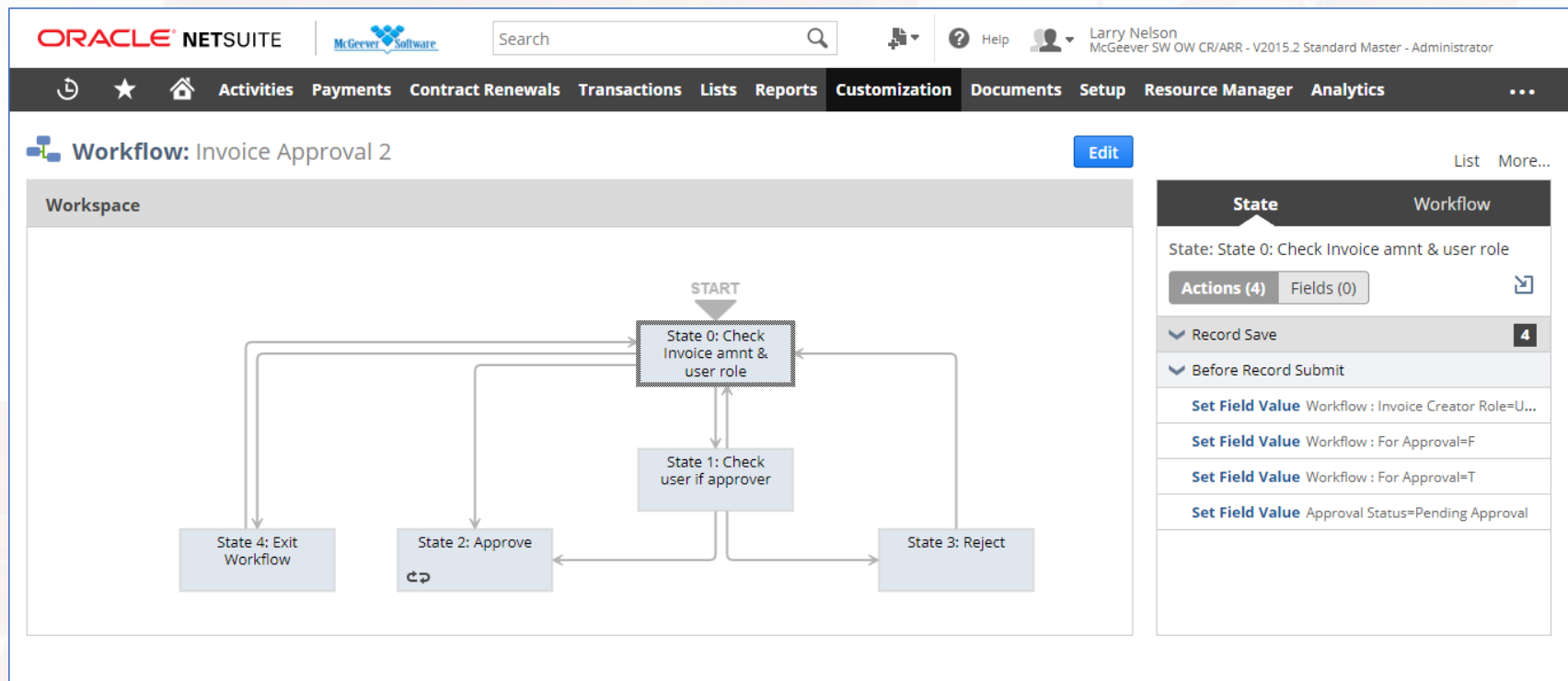
- Scenario 1:
 - Purchase Order Approval
- Scenario 2:
 - Customer Invoice Approval
- Scenario 3:
 - New Workflow Creation for Vendor Payment Approval

Scenario 1: PO Approval



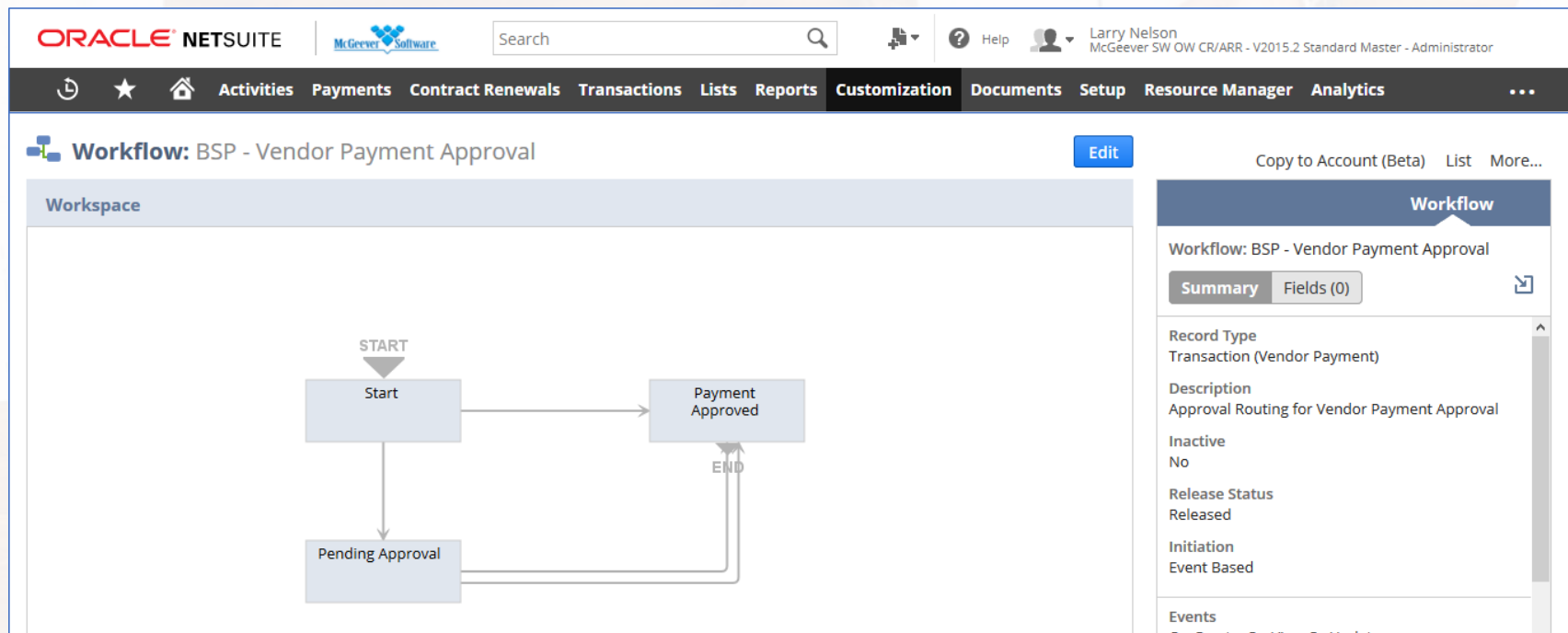
- **States:**
 - Relates to status of a record within the Workflow
 - Contains Actions and Transitions
- **Actions:**
 - Tasks performed by a Workflow with or without a condition
 - Examples: Add Button, Set Field Value, Set Record on Hold etc.
- **Transitions:**
 - Move from one State to another based on defined condition

Scenario 2: Cust. Invoice Approval



- Criteria that must be met to process Workflow
 - Action, or
 - Transition
- Conditions can reference
 - Any field in the record passed to the workflow
 - Any field in the related record
 - Any runtime or context-related fields
- Conditions can also be defined using Saved Search

Scenario 3: Vendor Payment Approval



- **Before Record Load**
 - Workflow is triggered when user requests a transaction or entity from server
 - Used to set default values, hiding fields, locking records etc.
 - Required when changing behavior on “View Record”
- **Before Record Submit**
 - Workflow is triggered when Saved button is clicked, but before record is committed
 - Used for updating field values, performing calculations etc.
- **After Record Submit**
 - Workflow is triggered after the record is committed
 - Used to update/create dependent and child records, send notifications etc.

Hussain Will Be Back!

NetSuite Masterclass

Saved Search Part 2

Date: TBD (Stay Tuned!)

Topic: Advanced Saved Search Functionality

NetSuite Masterclass

Workflows Part 2

Date: TBD (Stay Tuned!)

Topic: Advanced Workflows Functionality

[BSPNY.COM/EVENTS](https://bspny.com/events)

Here's A Preview

NetSuite Masterclass Workflows Part 2

Date: TBD (Stay Tuned!)

Topic: Advanced Workflows Functionality

- Run workflows on Schedule
- Nested workflows
- Workflow variables
- Custom workflow states
- Referencing Line Items (Sublists) in workflows
- Initiate workflow via SuiteScript

WEBINAR

THURSDAY, JUNE 11TH @ 2:00PM ET



1 CREDIT AVAILABLE



**YOUR FY'21
BUDGET**

**THE STEPS YOU SHOULD BE
TAKING **RIGHT NOW** TO PREPARE**



LIVE Q&A

Who's Got Questions?

Think of a question after today's live webinar? *Feel free to call / email Hussain Zaidi or the webinar team to follow up:*

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