

The logo for the Ontario NetSuite User Group is a shield-shaped emblem. It features a red border and a red base. The text "ONTARIO" is in black, "NETSUITE" is in red, and "USER GROUP" is in black, all in a bold, sans-serif font.

**ONTARIO
NETSUITE
USER GROUP**

SuiteFlow

MORE THAN JUST SETTING FIELD VALUES....

Workflows

Estimate Approval

- Send Email
- Transform Record
- Scheduled Transitions
- Create Line

Recurring Billings

- Scheduled Workflow
- Transform Record
- Saved Search Criteria

Custom “Suitelet”

- Mass update workflow initiation
- Send Email

Estimate Approval

- Send email to customer
- Approve via email
- Automatically create Sales Orders
- Auto-apply incentives
- Automatically create invoices

Estimate Approval – Workflow Config

Save | Cancel | Change ID | Actions ▾

Basic Information

NAME *
ESTIMATE - Email Approval

DESCRIPTION

ID
customworkflow_mgbc_est_emailapproval

OWNER
MGBC Admin

RECORD TYPE
Transaction

EXECUTE AS ADMIN

SUB TYPES *
Deposit
Deposit Application
Estimate
Expense Report
Inventory Adjustment

RELEASE STATUS
Released

KEEP INSTANCE AND HISTORY
Always

ENABLE LOGGING

INACTIVE

Initiation

EVENT BASED SCHEDULED

Event Definition

ON CREATE

USE VISUAL BUILDER CUSTOM FORMULA

ON VIEW OR UPDATE

TRIGGER TYPE
- All -

CONDITION


EVENT TYPES

SAVED SEARCH CONDITION

CONTEXTS
Action
Bank Connectivity
Bank Statement Parser
Bundle Installation

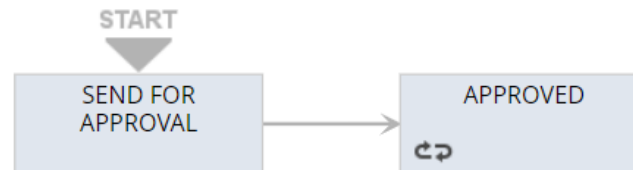
LOCALIZATION CONTEXT
<Type & tab for single value>

Estimate Approval - Workflow

 **Workflow:** ESTIMATE - Email Approval

Edit

Workspace



Estimate Approval – State 1

Workflow State

WORKFLOW

ESTIMATE - Email Approval

NAME

SEND FOR APPROVAL

ID

workflowstate92

DESCRIPTION

- DO NOT EXIT WORKFLOW
- START STATE

Actions • Transitions • Fields								
ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	
workflowaction200	Send Email	To: Estimate Approval Email, Subject: NEW ESTIMATE FOR APPROVAL {tranid}, Include Transaction	After Record Submit	Selected All	Selected 37 of 39	Send Estimate for Approval = T		
workflowaction201	Set Field Value	Estimate Incentive End Date={today} + {custbody_mgbc_est_incentivedays}	After Record Submit	Selected All	Selected 37 of 39	Send Estimate for Approval = T		
workflowaction202	Set Field Value	Send Estimate for Approval=F	After Record Submit	Selected All	Selected 37 of 39			

Estimate Approval - Transition

Workflow Transition

Save

Cancel

Change ID

Actions

Basic Information

WORKFLOW
ESTIMATE - Email Approval

ID
workflowtransition55

FROM
SEND FOR APPROVAL

TO *
APPROVED

INSERT BEFORE
- Unchanged -

TRANSITION ON
Scheduled

EVENT TYPES

Condition

USE VISUAL BUILDER CUSTOM FORMULA

CONDITION

SAVED SEARCH CONDITION
Estimates Approved via Email

WAIT FOR WORKFLOW

WAIT FOR WORKFLOW STATE

EXECUTE ON BUTTON

Estimate Approval – Saved Search

Saved Transaction Search

Estimates Approved via Email

[Save & Run](#) [Cancel](#) | [Preview](#) [New Template](#) [Change ID](#) | [Actions](#)

SEARCH TITLE *

Estimates Approved via Email

ID

customsearch95

OWNER

MGBC Admin

PUBLIC

AVAILABLE AS LIST VIEW


AVAILABLE AS DASHBOARD VIEW

AVAILABLE AS SUBLIST VIEW

AVAILABLE FOR REMINDERS

SHOW IN MENU

[Criteria](#) [Results](#) [Highlighting](#) [Available Filters](#) [Audience](#) [Roles](#) [Email](#) [Audit Trail](#) [Execution Log](#)

 Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard • [Summary](#)

FILTER *	DESCRIPTION *	FORMULA
Type	is Estimate	
Status	is Estimate:Open	
Main Line	is true	
Formula (Text)	contains approve	LOWER({messages.message})

Estimate Approval – State 2

Workflow State

Save

Cancel

Change ID

Actions ▾

WORKFLOW

ESTIMATE - Email Approval

NAME *

APPROVED

ID

workflowstate93

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions • Transitions Fields

Move To Top

Move To Bottom

New Action

New Group

New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION
workflowaction205	Set Field Value	Estimate Approval Date=today	Entry	Selected All	Selected 37 of 39			
workflowaction203	Set Field Value	TEST WF STATUS=APPROVED	Entry	Selected All	Selected 37 of 39			
workflowaction204	Transform Record	Sales Order (Into Estimate Sales Order)	Entry	Selected All	Selected 37 of 39	Estimate Sales Order Is Empty		

Estimate Approval – Transform Record

Workflow Action

CONTEXTS

Action
Bank Connectivity
Bank Statement Parser
Bundle Installation

Selected 37 of 39

INACTIVE

UNIT

Parameters

RECORD TYPE *

Sales Order

STORE RESULT IN

Estimate Sales Order

REDIRECT WITHOUT SAVING

FIELD *	TEXT	CHECKED	DATE	SELECTION	JOIN
Memo	Approved by Customer via Email				
Estimate Approval Date			today		
					<Type then tab>

Add Cancel Insert Remove

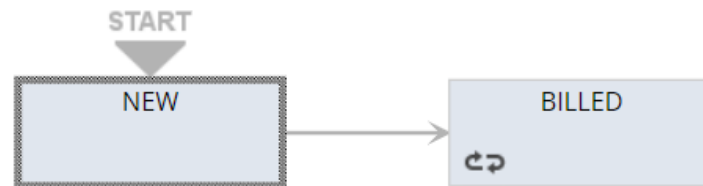
Estimate Approval – SO Incentive

 Workflow: ESTIMATE (SO Incentive)

 View

Workspace

+ New State



Estimate Approval – SO State 1

Workflow State

ESTIMATE (SO Incentive)

NAME *

NEW

ID

workflowstate94

DO NOT EXIT WORKFLOW

START STATE

Actions • Transitions • Fields

Move To Top

Move To Bottom

New Action

New Group

New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION
workflowaction210	Set Field Value	Ship Date={today} + {custbody_mgbc_expecteddaystoship}	After Record Submit	Selected 1 of 13	Selected 37 of 39			
workflowaction206	Set Field Value	Discount Item=Estimate Incentive : Incentive Discount Item	After Record Submit	Selected 1 of 13	Selected 37 of 39	Estimate Approval Date <= Estimate Incentive End Date		
workflowaction208	Create Line	Sublist: Items, Position: After Last Line	After Record Submit	Selected 1 of 13	Selected 37 of 39	Estimate Approval Date <= Estimate Incentive End Date		
workflowaction209	Send Email	To: Estimate Approval Email, Subject: ORDER ACKNOWLEDGEMENT {tranid}, Include Transaction	After Record Submit	Selected 1 of 13	Selected 37 of 39			

Estimate Approval – SO Transition

Workflow State

Save

Cancel

Change ID

Actions ▾

WORKFLOW

ESTIMATE (SO Incentive)

NAME *

NEW

ID

workflowstate94

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions • Transitions • Fields

Move To Top

Move To Bottom

New Transition

ID	EDIT	TO STATE	TRANSITION ON	EVENT TYPES	CONTEXTS	CONDITION	SAVED SEARCH CONDITION	FORMULA	WAIT FOR WORKFLOW
⋮ workflowtransition56	Edit	BILLED	Scheduled	Selected All	Selected 37 of 39	Status = Sales Order:Pending Billing			

Save

Cancel

Change ID

Actions ▾

Estimate Approval – SO State 2

Workflow State

Save

Cancel

Change ID

Actions ▾

WORKFLOW
ESTIMATE (SO Incentive)

NAME *

BILLED

ID
workflowstate95

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions • Transitions Fields

Move To Top

Move To Bottom

New Action

New Group

New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION
⋮ workflowaction211	Transform Record	Invoice	Entry	Selected All	Selected 37 of 39			

Save

Cancel

Change ID

Actions ▾

Email Initiation

NEW ESTIMATE FOR APPROVAL QU01468 (originally To: alan.isola@gmail.com)

 system@sent-via.netsuite.com 10:25 PM INBOX ↩ ↪ → ⌵

📄 info 📖 🔗

[Display now](#) · External Images are not displayed

Dear Valued Customer,

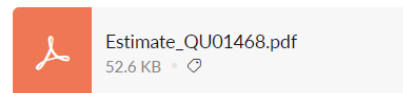
Thank you so much for your interest in our products. Attached is an Estimate for the parts and services you requested. Please reply to this email and simply type "Approved" to approve this Estimate for immediate processing.

Also, If you approve this Estimate within the next 5 days you will receive 10% off your total order, plus a FREE GIFT!!

Sincerely,

Scotty Sales

📎 **1 Attachment** · [Download as Zip](#)



Sales Order Creation

APPROVED

Items Shipping Billing Accounting Relationships Communication Related Records System Information Custom												
DISCOUNT ITEM Customer Incentive										RATE	-10.0%	
ITEM	COMMITTED	PICKED	PACKED	FULFILLED	INVOICED	BACK ORDERED	QUANTITY	UNITS	INVENTORY DETAIL	DESCRIPTION	PRICE LEVEL	
PIP-2D-00107	0	0	0	0	0	24	24				Custom	
HRD-FN-00104	0	0	0	0	0	1,000	1,000				Custom	
HRD-HB-00101	0	0	0	0	0	2,500	2,500				Custom	
HRD-HB-00105	0	0	0	0	0	5,000	5,000	ea			Custom	
HRD-HN-00106	0	0	0	0	0	10,000	10,000				Custom	
FREE GIFT	0	0	0	0	0	1	1	ea		FREE GIFT	Custom	

- Edit
- Back
- Fulfill
- Close Order
- Create Deposit
- Manage Revenue Recognition
- Check Sales Tax Rates
- Review Customer Purchase History

Email Confirmation

Items Shipping Billing Accounting Relationships **Communication** Related Records System Information Custom

Messages • Activities Files User_Notes

TO BE PRINTED
 TO BE E-MAILED company@franklinmunch.com
 TO BE FAXED

CUSTOMER MESSAGE

VIEW
Default

Email Attach Letter PDF Fax Refresh View History Customize View

#	VIEW	DATE	AUTHOR	PRIMARY RECIPIENT	SUBJECT	TYPE	FILES	ATTACHMENTS
1	View	4/18/2023 10:05 pm	Scotty Sales	alan.isola@gmail.com	ORDER ACKNOWLEDGEMENT SO10032	Email	No	

Edit Back Fulfill Close Order Create Deposit Manage Revenue Recognition Check Sales Tax Rates Review Customer Purchase History

Recurring Billing

- Define a subscription or recurring billing model
- Set billing frequency
- Define recurrence end date (optional)






Recurring Billing – Estimate Fields

Estimate 

List Search Customize

Save  Cancel Auto Fill SUBMIT Actions 

Primary Information

CUSTOM FORM *	DATE *
Custom Recurring Billing Estimate 	4/18/2023
ESTIMATE #	STATUS *
To Be Generated	Proposal 
CUSTOMER *	PROBABILITY *
103 Franklin Munch 	50.0%
PROJECT	EXP. CLOSE *
	5/1/2023
TITLE	MEMO
2023 Monthly Subscription 	2023 Monthly Subscription
EXPIRES	
5/30/2024	

Summary	
SUBTOTAL	1,200.00
DISCOUNT ITEM	0.00
TAX	
SHIPPING COST	0.00
TOTAL	1,200.00

Recurring Invoice Configuration

NEXT INVOICE DATE	RECURRING INVOICE FREQUENCY	RECURRING INVOICE END DATE
5/1/2023	30	5/30/2024

Sales Information

SALES REP	FORECAST TYPE	PARTNER
Scotty Sales 	Omitted 	

Recurring Billing – Line Items

Items Shipping Billing Accounting Relationships Communication Related Records System Information Custom

DISCOUNT ITEM

RATE

ITEM	UNITS	QUANTITY	DESCRIPTION	INVENTORY DETAIL	PRICE LEVEL	RATE	AMOUNT	TAX	OPTIONS	PROJECT ITEM
Consulting Services		1	Consulting Services		Custom	1,200.00	1,200.00	Yes		

Edit

Back

Sales Order

Cash Sale

Invoice

SUBMIT



Actions

Recurring Billing – Saved Search

Saved Transaction Search

WF - Invoices to be Created

[Save & Run](#) [Cancel](#) [Preview](#) [New Template](#) [Change ID](#) [Actions](#)

SEARCH TITLE *

WF - Invoices to be Created

ID

customsearch93

OWNER


MGBC Admin

PUBLIC

AVAILABLE AS LIST VIEW

- AVAILABLE AS DASHBOARD VIEW
- AVAILABLE AS SUBLIST VIEW
- AVAILABLE FOR REMINDERS
- SHOW IN MENU

[Criteria](#) [Results](#) [Highlighting](#) [Available Filters](#) [Audience](#) [Roles](#) [Email](#) [Audit Trail](#) [Execution Log](#)

 Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard • Summary

FILTER *	DESCRIPTION *
Type	is Estimate
Main Line	is true
Next Invoice Date (Custom Body)	is within today

[Add](#) [Cancel](#) [Insert](#) [Remove](#)

Recurring Billing – Workflow

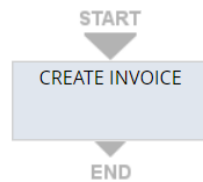
 Workflow: ESTIMATE - Create Recurring Invoices

 View

Copy to Account List More...


Workspace

+ New State



Workflow

Workflow: ESTIMATE - Create Recurring Invoices

Summary Fields (1) 

Record Type
Transaction (Estimate)

Description
-

Inactive
No

Release Status
Released

Initiation
Scheduled

Saved Search Filter
WF - Invoices to be Created

Schedule
Daily (every 1 days)

Recurring Billing – State 1

Workflow State

Save

Cancel

Change ID

Actions ▾

WORKFLOW

ESTIMATE - Create Recurring Invoices

NAME *

CREATE INVOICE

ID

workflowstate81

DESCRIPTION

DO NOT EXIT WORKFLOW

START STATE

Actions • Transitions Fields •

Move To Top

Move To Bottom

New Action

New Group

New Sublist Group

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION
workflowaction177	Set Field Value	Workflow : WF Current Next Invoice Date=Next Invoice Date	Entry	Selected All	Selected 37 of 39			
workflowaction176	Transform Record	Invoice	Entry	Selected All	Selected 37 of 39			
workflowaction212	Set Field Value	Next Invoice Date={custworkflow_mgbc_wf_currentnextinvdate} + {custbody_mgbc_invoicefrequency}	Entry	Selected All	Selected 37 of 39			

Recurring Billing – Transform Record

Parameters

RECORD TYPE *

Invoice

STORE RESULT IN

REDIRECT WITHOUT SAVING

FIELD *	TEXT	CHECKED	DATE	SELECTION	JOIN	VALUE FIELD	FORMULA
Date			today				
Memo	Monthly Invoice						TO_CHAR({today}, 'MMM YYYY') ' Invoice'
				<Type then tab>			

Add Cancel Insert Remove

Recurring Billing – Project Costs

Estimate 

  List

QU01472 103 Franklin Munch

OPEN

Edit

Back

Sales Order

Cash Sale

Invoice

SUBMIT



Actions 

Primary Information

ESTIMATE #
QU01472

CUSTOMER
103 Franklin Munch

PROJECT
[10004 2023 NetSuite Implementation](#)

TITLE
2023 Monthly Billings

EXPIRES
5/30/2024

DATE
4/18/2023

STATUS
Proposal

PROBABILITY
50.0%

EXP. CLOSE
5/1/2023

MEMO
2023 Monthly Billings

TOTAL UNBILLED PROJECT COSTS
8,500.00

Summary

SUBTOTAL	1,200.00
DISCOUNT ITEM	
TAX	0.00
SHIPPING COST	
TOTAL	1,200.00

Recurring Invoice Configuration

NEXT INVOICE DATE
5/1/2023

RECURRING INVOICE FREQUENCY
30

RECURRING INVOICE END DATE
5/30/2024

Sales Information

Custom Mass Update

- Create a “DIY Suitelet” to bulk process records
- Selectively choose statements to send
- Send to custom email address (or multiple email addresses)

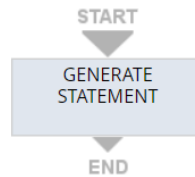
Custom Mass Update

 Workflow: CUSTOMER - Generate Statement

Edit

Copy to Account List More...

Workspace



Workflow

Workflow: CUSTOMER - Generate Statement

Summary Fields (0)

Record Type
Customer (Customer)

Description
-

Inactive
No

Release Status
Not Initiating

Initiation
Event Based

Events

Trigger Type
- All -

Custom Mass Update – State 1

Workflow State

[Save](#) [Cancel](#) | [Change ID](#) | [Actions](#)

WORKFLOW
CUSTOMER - Generate Statement

NAME *
GENERATE STATEMENT

ID
workflowstate96

DESCRIPTION

DO NOT EXIT WORKFLOW
 START STATE

Actions • Transitions Fields

[Move To Top](#) [Move To Bottom](#) [New Action](#) [New Group](#)

ID	NAME	PARAMETERS	TRIGGER ON	EVENT TYPES	CONTEXTS	CONDITION	FORMULA	SAVED SEARCH CONDITION
⋮ workflowaction213	Send Email	To: E-mail, Subject: MGBC Statement of Accounts, Include Statement	Entry	Selected All	Selected 37 of 39			

[Save](#) [Cancel](#) | [Change ID](#) | [Actions](#)

Custom Mass Update – Send Email

Workflow Action

FREE FORM ADDRESS

EMAIL

FROM FIELD

RECORD (JOIN FIELD)

Current Record

FIELD *

E-mail

CC

BCC

INCLUDE VIEW RECORD LINK

Attachment

FILE

FROM FIELD

RECORD (JOIN FIELD)

Current Record

FIELD

INCLUDE STATEMENT

TYPE

PDF

STATEMENT DATE

today

START DATE

SHOW ONLY OPEN TRANSACTIONS

CONSOLIDATED STATEMENT

USE CUSTOMER'S LOCALE



Custom Mass Update

Mass Updates

ACTION
Item Collection
Custom Updates
Workflows
Case
Initiate TEST Case
Process TEST Case
Cancel TEST Case
Transition TEST Case
Customer
Customer Return Request
Initiate Customer Return Request
Process Customer Return Request
Cancel Customer Return Request
Transition Customer Return Request
Customer Service Request
Initiate Customer Service Request
Process Customer Service Request
Cancel Customer Service Request
Transition Customer Service Request
Initiate CUSTOMER - Generate Statement
Process CUSTOMER - Generate Statement
Cancel CUSTOMER - Generate Statement
Transition CUSTOMER - Generate Statement
Initiate CUSTOMER - Hubspot Sync

Custom Mass Update - Criteria

Mass Update

|

TITLE OF ACTION *

Bulk Generate Statements

WORKFLOW


CUSTOMER - Generate Statement

PUBLIC

TYPE

Customer

Criteria Results Audience Schedule Audit Trail

 Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

FILTER *	DESCRIPTION *
Inactive	is false
Overdue Balance	is greater than 0.00
<input type="text"/>	

|

Custom Mass Update - Process

Mass Update Preview Results

List Search Audit Trail

Return To Criteria

Perform Update

Save

Cancel

Workflow: CUSTOMER - Generate Statement Field

Value

TOTAL: 5

APPLY	#	COMPANY NAME ▲	EMAIL	BALANCE	OVERDUE BALANCE
<input checked="" type="checkbox"/>	1	ABC Supply Company, Inc		305,999.00	283,900.00
<input checked="" type="checkbox"/>	2	Franklin Munch	company@franklinmunch.com	0.00	0.00
<input checked="" type="checkbox"/>	3	Rigby & Sons	isolaalan@gmail.com	0.00	0.00
<input checked="" type="checkbox"/>	4	Walmart		0.00	0.00
<input checked="" type="checkbox"/>	5	Z.T. Distribution Inc.		0.00	0.00

Custom Mass Update – Center Link

ORACLE NETSUITE



Search



-
-
-
- Activities
- Transactions
- Lists
- Reports
- Analytics
- Documents
- Setup
- Customization**
- Commerce
- SuiteApps

Custom Center Links

Save

Cancel

LABEL *

URL *

Bulk Email Statements

<https://app.netsuite.com/app/common/bulk/bulkresults.nl>

✓ OK

✕ Cancel

+ Insert

🗑 Remove



MGBC

www.mgbcpro.com

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- [Enhanced Workflow Actions](#)



Dynamic Lookup

Much like Excel's VLOOKUP you can use any field value on the current record to lookup and compare that value to any other field on any other record. Also join the found record to the current record.



Go To URL

Redirect the user to any URL from directly within your workflow. Take them to External websites, Saved Searches, or even other NetSuite records. URL parameters are also supported so the destination can be pre-filtered or pre-populated with data from the current record.



Initiate ANY Workflow

Initiate any workflow in your environment from within another workflow. Here you are not limited to workflows of the same record type but can manipulate other records through workflows you initiate based on your specific conditions.



Pop-up with User Input

Capture reasons and responses directly within your workflows through directed pop-up windows. Store those responses on the current record to use in other actions and conditions.



Set Field Value - Joined Record

Set the value of any field on a record that is joined to your current record.



Manipulate ANY Sublist

Make a transaction line field mandatory based on custom conditions. Set the value of a transaction line field. This can be done on ANY sublist now! Manipulate the Expenses sublist on a Vendor Bill, or even the Lines sublist on a Journal Entry.



Validate Period Status

Validate the status of the accounting period assigned to the transaction. (ie. Locked, Closed, Open, etc). Use that validated status in conditions or transitions throughout your workflow.



Set Field Value - Child Record

Set the value of any field on ALL records joined to your current record as Child Records.



Create and Attach PDF

Use any Advanced PDF template to generate a PDF of the current record and attach it natively or in a custom document field. Use this generated PDF in Sent Emails or other actions within your workflow.