



SUITEFLOW: WORKFLOWS FOR DEVELOPERS

Course Description

Are you ready to take your business processes to the next level?

In this three-day, advanced-level **SuiteFlow: Workflows for Developers** course, you will learn the skills necessary to build more complex business processes using NetSuite's point-and-click business process automation tool—SuiteFlow.

Geared towards the experienced technical NetSuite user, this course introduces many of SuiteFlow's advanced capabilities supporting more complex use cases, such as configuring Service Level Agreements (SLAs) and lead nurturing campaigns, incorporating sub-workflows to support sequential and parallel approvals, using Saved Searches in action and transition conditions, altering workflow processing based on changes to related records, extending the power of SuiteFlow using formulas and SuiteScript, and more!

Key Objectives

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

- Incorporate modular workflow design principles to reduce workflow complexity.
- Add field, form and record-level validations during data entry, load and save.
- Create approval processing workflows with sequential and multiple approvals.
- Configure Service Level Agreements using scheduled actions and transitions.
- Conditionally transition workflows and execute actions based on Saved Search results.
- Alter the state of a workflow based on changes to data in related records.
- Configure business processes that run in parallel using sub-workflows.
- Embed SQL and SuiteScript formulas in conditions to support more complex business rules.
- Configure Workflow Action Scripts to support custom actions.
- Execute workflows in different contexts, such as User Event Scripts, Suitelets and mass updates.

Course participants will apply the knowledge and skills learned throughout this course by completing several hands-on exercises that guide them through the implementation of real-world business requirements and common use cases.

Who Should Attend?

This course is geared towards software developers, technical administrators and other technical users who are looking to enhance their knowledge and skills to support more technically complex business processes and use cases in NetSuite.

Non-technical users should attend [SuiteFlow: Workflow Fundamentals](#).

Prerequisites

Course participants should be experienced with NetSuite navigation, general administration tasks and building Saved Search criteria using expressions.

In addition, participants should have an understanding of business process mapping and decision branching, event-based programming and object-oriented software development principles.

Course Goals

The course begins by introducing the fundamental concepts of building workflows in SuiteFlow, while taking you through the creation of a number of different business processes. By working through a series of hands-on exercises, participants will learn

Related Courses

Take these courses for more training:

- SuiteScript 1.0: Extend NetSuite with JavaScript
- SuiteTalk: Integrate Your Applications

how to create full-featured, modular business processes that incorporate field and form-level validations, performing actions on record load and save, creating joins on related records and configuring approval processing workflows with both single and multiple approvers.

The course then dives into the more technically advanced capabilities of SuiteFlow, such as scheduling actions and transitions to support Service Level Agreements, using Saved Searches in action and transition conditions, configuring transitions based on changes to data in related records, using modularized workflow design principles to create sub-workflows supporting parallel processing, enhancing automation capabilities through the use of formulas, configuring Workflow Action Scripts to create custom actions and executing workflows in other contexts, such as User Event Scripts, Suitelets and Mass Updates.

Day 1 Topics

[SuiteFlow Foundations](#): Learn about the foundational concepts, terminologies and components associated with the development of workflows in SuiteFlow.

Understanding Workflow Triggers: Learn about workflow events by understanding the various workflow triggers used to execute actions and transitions at various states of a workflow, and the execution sequence of these triggers during the processing of records in NetSuite.

Configuring Actions on Data Entry, Load and Save: Configure business rules on client-side events in the user interface, such as field level validations, changing field display characteristics and sourcing data from related records. Control how form data is displayed while loading a record into the browser based on whether you are creating, viewing, editing or printing a record. Configure actions on record save, such as creating new records, sending email notifications and server-side validations.

Troubleshooting Workflow Execution: Learn how to use Active Workflows, Workflow History and the Workflow Execution Log to troubleshoot workflow processing by examining state transitions, the execution order of actions and the associated triggers.

Day 2 Topics

Incorporating Approval Processing: Learn how to add simple approval-based processing with single approvers. Add custom buttons to your forms, send email notifications, lock records and create fields to manage approval statuses and current approvers. Configure multiple approvers up the supervisor hierarchy using a looping construct that checks for additional approvers.

SuiteAnswers

Get answers to your support and training related questions:

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

Scheduling Workflows, Actions and Transitions: Incorporate a Service Level Agreement to drive approval processing through to completion by scheduling reminder email notifications, changing priority of tasks, escalating records to other approvers and configuring auto-rejection.

Using Saved Searches in Conditions: Support conditional actions and transitions based on Saved Search results on record sublist data. Learn how Saved Searches can also be used to manage changes to currently running workflows and best practices for upgrading your workflows without adverse consequences.

Working with Sub-Workflows: Apply modular workflow design principles to create sub-workflows that reduce complexity, lower maintenance costs and support reusability. Learn how to sequence the execution of one or more workflows to support parallel processing and even parallel approvals.

Day 3 Topics

Configuring Transitions on Related Records:

Learn how to influence workflow processing based on changes to related record data.

Working with Formulas: Learn about the different formula types and how SQL formulas can be used to perform complex server-side calculations.

Using SuiteScript in Workflows: Build client-side SuiteScript formulas. Extend workflow processing through the configuration of Workflow Action Scripts and custom actions (developed using SuiteScript).

Executing Workflows in Different Contexts: Learn how to restrict workflow, action and transition execution to a specific workflow context, such as User Event Scripts, Suitelets and workflow mass updates.

Live Training Webinars

Participate in free webinars to get practical tips and tricks for using NetSuite better:

- Go to suitetraining.com > Webinars and Events to view the schedule and register for an event.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite account.

