N1 NETSUITE | Suite Training

SuiteFlow: Advanced Workflows

Course Description

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

In this three-day, advanced-level **SuiteFlow: Advanced Workflows** course, you will learn the skills necessary to build more complex business processes using NetSuite's 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), 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, updating sublist lines on Transaction records, extending the power of SuiteFlow using SQL and SuiteScript formulas, and improving workflow processing performance.

Who Should Attend

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

Prerequisites

Course participants should be experienced with NetSuite navigation, general administration tasks and building Saved Search criteria using expressions. Participants should also have taken the *Workflow Fundamentals* course or possess an aptitude for creating approval workflows.

In addition, participants should be familiar with event-based programming and object-oriented software development principles, such as *if-then*, *looping*, and other programming constructs.

Course Goal

The goal of this course is to provide you with an applied understanding of the key terminologies, concepts, skills, and best practices that will enable you to support more complex business processes and use cases using many of the advanced capabilities of SuiteFlow.

Participants will apply the knowledge and skills learned throughout this course by completing several hands-on exercises that guide you through the creation of a full-featured business process utilizing modular workflow development principles and SuiteFlow best practices.

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Key Tasks
How do I:

- Configure Service-level Agreements using scheduled actions and transitions?
- Execute actions and transitions using saved searches as conditions?
- Configure business processes that run in parallel using sub-workflows?
- Alter the state of a workflow based on changes to related records?
- Use SQL and SuiteScript formulas in conditions?
- Update Transaction record sublist lines using Sublist Action Groups?
- Integrate custom workflow actions developed using Workflow Action Scripts?
- Execute workflows in different contexts, such as CSV Import, User Event Script, Suitelet, and Mass Update?
- Develop workflows based on best practices to ensure optimal workflow processing performance?

Day 1 Agenda
Workflow Triggers Review: Provides a review of *workflow triggers*, which represent events that occur during the processing of records in NetSuite. Review topics include both client and server triggers and the workflow execution model, which specifies the order in which each trigger occurs during workflow processing.

Scheduling 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.

Day 2 Agenda
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 parallel approvals using the Initiate Workflow action.

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Configuring Transitions on Related Records: Learn how to influence workflow processing based on changes to related record data and the configuration of the Subscribe To Record action.

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

Day 3 Agenda

Accessing Items Sublist Lines: Learn how to configure *Sublist Action Groups* and configure workflow actions to process Items sublist lines on a line-by-line basis in Transaction records.

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 CSV Import, User Event Scripts, Suitelets, and Mass Updates.

Improve Workflow Performance: Provides useful tips and best practices to improve overall workflow processing performance. Areas discussed include workflow design and execution, constructing appropriate conditions, and processing workflows and actions at After Record Submit, workflow logging, and Workflow Action Scripts.

Related Courses
Take these courses for more training:
- SuiteScript 1.0: Extend NetSuite with JavaScript
- SuiteScript 2.0: Extend NetSuite with JavaScript
- SuiteTalk: Integrate Your Applications

SuiteAnswers
Get answers to your support and training related questions:
- Go to Training Videos to find Getting Started tutorials.
- Take New Feature Training to learn about the latest NetSuite release.

Live Training Webinars
Participate in free Webinars to get practical tips and tricks for using NetSuite better:

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- 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.