



NetSuite Implementation, Consulting, and Support



STORE A DYNAMIC FIELD ON A RECORD

PURPOSE AND USE CASES

Purpose

- Use a saved search to calculate a value dynamically
- Creating only one field for the calculation does not store the value on the record
- A non-stored value can not be used in reports, saved searches, or exported out of NetSuite

Some Use cases

- Calculate sales history by time frame on items
 - Such as previous 30, 60, or 90 days
- Calculate customer sales in a given time frame
- Sum custom fields from line items
- Calculate Actual Sales related to Opportunities

1 CREATE A SAVED SEARCH WITH ONE RESULT THAT IS THE VALUE THAT YOU WANT TO STORE

- This can be a summary, formula, anything
- On the Available Filters, set to internal id (does not need to show)

2 CREATE 2 CUSTOM FIELDS FOR THE RECORD

- One with Store Value checked
- One without Store Value checked
 - On Validation & Defaulting, set the Search to be the search created in step 1

3 CREATE ANOTHER SAVED SEARCH THAT DEFINES THE RECORDS THAT YOU WANT TO UPDATE

- Be careful not to have this run on a ton of records every 30 minutes

4 CREATE A WORKFLOW

- The trigger is the saved search created in step 3
- Action is Set Field Value of the “Store Value” field defined in step 2
- Source the value of that field from the other field created (non-store value)


REQUIREMENTS

- Knowledge of Saved Searches, Custom Fields, and Workflows is needed (basic skill level is OK)
- Saved Searches and Workflow all need to be of the same record type - which contains the fields being created
- The custom fields need to be of the same Type – eg. Integer, Currency, Date, Decimal etc. . . .

CREATE A SAVED SEARCH WITH ONE RESULT THAT IS THE VALUE THAT YOU WANT TO STORE



Item Search

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

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

USE EXPRESSIONS

Standard • Summary


FILTER*	DESCRIPTION*
Transaction : Type	is any of Invoice, Cash Sale
Transaction : Date	is within 365 days ago and 0 days ago
<input type="text"/>  	

| | **Actions** ▾

CREATE A SAVED SEARCH WITH ONE RESULT THAT IS THE VALUE THAT YOU WANT TO STORE

Important! Only one line of results. See below.

Criteria **Results** Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

 Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
Transaction : Quantity DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

OUTPUT TYPE
Normal
 SHOW TOT.
 RUN UNRE:
 MY PREFER


Columns • Drill Down Fields •

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD
Internal ID				
Transaction : Quantity	Sum			
<input type="text"/>				

| |

CREATE A SAVED SEARCH WITH ONE RESULT THAT IS THE VALUE THAT YOU WANT TO STORE

Criteria Results Highlighting Available Filters Audience Roles Email Audi

 Limit the set of filters available on the form when you reuse this search, or to set filters for the results (such as when used a search.

MY PREFERRED SEARCH FORM

Remove all Add Multiple



FILTER* SHOW I

Internal ID

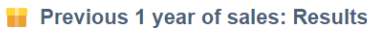
✓ Add ✕ Cancel + Insert 🗑 Remove ⬆ Move Up ⬇ Move Down ↕

Save ▼ Reset Cancel | Preview Pivot Report | Actions ▼

CREATE A SAVED SEARCH WITH ONE RESULT THAT IS THE VALUE THAT YOU WANT TO STORE

ORACLE NETSUITE  Help Feedback  Cory Anderson RMNSUG Gill OW GB US Std 2016.2.12.23 - Administrator


Activities Payments Transactions Quick Start **Lists** Reports Analytics Documents Setup Customization Audit Trail Tools Pajejet SuiteCommerce Support

 List Search Audit Trail

[Edit this Search](#)

FILTERS

STYLE
Normal

 TOTAL: 1

COUNT OF QUANTITY ▲
7

CREATE 2 CUSTOM FIELDS FOR THE RECORD

Field #1: Non-Stored Field

Custom Item Field

|

LABEL *

ID

OWNER

DESCRIPTION

MATRIX OPTION

TYPE

LIST/RECORD

STORE VALUE USE ENCRYPTED FORMAT

Applies To Display Validation & Defaulting Sourcing & Filtering Access Translation

- INVENTORY ITEM
- NON-INVENTORY ITEM
- SERVICE
- EXPENSE ITEM
- OTHER CHARGE
- GROUP
- KIT/PACKAGE
- ASSEMBLY/BILL OF MATERIALS
- SUBTYPE BOTH PURCHASE SALE
- PRINT ON PRICE LIST
- SUBSCRIPTION PLAN

SELECT INDIVIDUAL ITEMS
<Type & tab for single value>

INCLUDE CHILD ITEMS

CREATE 2 CUSTOM FIELDS FOR THE RECORD

Field #1: Non-Stored Field

Applies To

Display

Validation & Defaulting

Sourcing & Filtering

Access

Translation

INSERT BEFORE

SUBTAB

DISPLAY TYPE

Save



Cancel

Reset

Apply to Forms

CREATE 2 CUSTOM FIELDS FOR THE RECORD

Field #1: Non-Stored Field

Custom Item Field

Save ▼ **Cancel** **Reset** | **Apply to Forms**

LABEL *
Prior 1 year sales - non-stored

ID
_prior_1_year_sales_nonstored

OWNER
Cory Anderson

DESCRIPTION

MATRIX OPTION

TYPE
Integer Number

LIST/RECORD
+

STORE VALUE USE ENCRYPTED FORMAT

Applies To Display **Validation & Defaulting** Sourcing & Filtering Access Translation

MANDATORY
 CHECK SPELLING

MINIMUM VALUE

MAXIMUM VALUE

DEFAULT VALUE
FORMULA

SEARCH
Previous 1 year of sales

FIELD

Save ▼ **Cancel** **Reset** | **Apply to Forms**

CREATE 2 CUSTOM FIELDS FOR THE RECORD

Field #2: Stored Field

Custom Item Field

|

LABEL *

ID

OWNER

DESCRIPTION

MATRIX OPTION

TYPE

LIST/RECORD

STORE VALUE USE ENCRYPTED FORMAT

Applies To

- INVENTORY ITEM
 - NON-INVENTORY ITEM
 - SERVICE
 - EXPENSE ITEM
 - OTHER CHARGE
 - GROUP
 - KIT/PACKAGE
 - ASSEMBLY/BILL OF MATERIALS
- SUBTYPE BOTH PURCHASE SALE
- PRINT ON PRICE LIST
 - SUBSCRIPTION PLAN

SELECT INDIVIDUAL ITEMS

INCLUDE CHILD ITEMS

CREATE 2 CUSTOM FIELDS FOR THE RECORD

Field #2: Stored Field

Custom Item Field

Save **Cancel** **Reset** | **Change ID** **Apply to Forms** | **Actions** ▾

LABEL *
Prior 1 year sales

ID
custitem_prior_1_year_sales

INTERNAL ID
11356

OWNER
Cory Anderson

DESCRIPTION

MATRIX OPTION

TYPE
Integer Number

LIST/RECORD

Applies To **Display** **Validation & Defaulting** **Sourcing & Filtering** **Access** **Translation** **History**

INSERT BEFORE
- Unchanged -

SUBTAB
Main

DISPLAY TYPE
Normal

APPLY FORMATTING

Save **Cancel** **Reset** | **Change ID** **Apply to Forms** | **Actions** ▾

SAVED SEARCH FOR RECORDS TO UPDATE

Saved Item Search


Save & Run ▼ | **Reset** | **Cancel** | **Preview** | **Pivot Report** | **Actions** ▼

SEARCH TITLE *
Items to update 1 year sales

ID

- PUBLIC
- AVAILABLE AS LIST VIEW
- AVAILABLE AS DASHBOARD VIEW

Criteria | Results | Highlighting | Available Filters | Audience | Roles | Email | Audit Trail | Execution Log | Search Title Translation

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


USE EXPRESSIONS

Standard	Summary
FILTER *	DESCRIPTION *
Type	is Inventory Item
Inactive	is false
<input type="text" value=""/>	
✓ Add ✕ Cancel + Insert 🗑 Remove	

Save & Run ▼ | **Reset** | **Cancel** | **Preview** | **Pivot Report** | **Actions** ▼

SAVED SEARCH FOR RECORDS TO UPDATE

- Criteria
- Results**
- Highlighting
- Available Filters
- Audience
- Roles
- Email
- Audit Trail
- Execution Log
- Search Title Translation

 Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
 DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

OUTPUT TYPE

 SHOW TOTALS
 RUN UNRESTRICTED
 MY PREFERRED SEAF

Columns • Drill Down Fields •

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD
⋮ Name				
⋮ Description				
<input type="text"/>				

WORKFLOW TO UPDATE STORED VALUE FIELD

Basic Information

NAME *

Update 1 year sales

ID

RECORD TYPE *

Item

SUB TYPES *

Discount Item

Gift Certificate Item

Inventory Part

Item Group

Kit Item

DESCRIPTION

Updates the 'Prior 1 year sales' from a dynamic saved search.

OWNER

Cory Anderson

EXECUTE AS ADMIN

RELEASE STATUS

Testing

KEEP INSTANCE AND HISTORY

Always

ENABLE LOGGING

INACTIVE

Initiation

WORKFLOW TO UPDATE STORED VALUE FIELD

Initiation

EVENT BASED SCHEDULED

Schedule

SAVED SEARCH FILTER *

Items to update 1 year sales [wf] ▼

REPEAT

FREQUENCY

Weekly ▼

SCHEDULED FROM DATE *

1/6/2020 

SCHEDULED UNTIL DATE



EXECUTION TIME *

12:00 am ▼

Weekly Schedule

Repeat every week(s)

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

WORKFLOW TO UPDATE STORED VALUE FIELD

Basic Information

WORKFLOW
Update 1 year sales

STATE
State 1

TYPE
Set Field Value

ID

INSERT BEFORE

TRIGGER ON
Entry

EVENT TYPES
Approve
Cancel
Copy
Create

CONTEXTS
Action
Bundle Installation
Client
CSV Import

INACTIVE

Triggering Client Fields

TRIGGERING CLIENT FIELDS
% Capacity for Replenishment
(c) Item Category
+Parent Item Image
Account (Income/Expense)

Condition

USE VISUAL BUILDER

CONDITION

SAVED SEARCH CONDITION

Schedule

USE DELAY TIME

DELAY

START TIME

WORKFLOW TO UPDATE STORED VALUE FIELD

Action = 'Set Field Value'
Here's the magic part!

The screenshot displays a workflow configuration interface for the 'Set Field Value' action. It is divided into two main sections: 'Parameters' and 'Value'.

Parameters: A dropdown menu labeled 'FIELD *' is set to 'Prior 1 year sales'. This section is circled in red.

Value: This section contains several options for setting the field value:

- STATIC VALUE**
 - TEXT:** An empty text input field.
 - CHECKED:** A checkbox.
 - SELECTION:** A dropdown menu with the text '<Enter first few letters then tab>' and a downward arrow.
- DATE:** A date selection dropdown menu.
- FROM FIELD**
 - RECORD (JOIN FIELD):** A dropdown menu set to 'Current Record'.
 - FIELD:** A dropdown menu.
- FORMULA:** A text input field containing the formula `{custitem_prior_1_year_sales_nonstored}`. This field is circled in red.

WORKFLOW TO UPDATE STORED VALUE FIELD

Make this Action inactive after successful testing

Workflow Action

INACTIVE

Parameters

Sender

SPECIFIC SENDER

SENDER *

Cory Anderson

FROM FIELD

RECORD (JOIN FIELD)

Current Record

FIELD

Recipient

SPECIFIC RECIPIENT

RECIPIENT

<Enter first few letters then tab>

FREE FORM ADDRESS

EMAIL *

csanderson@eidebailly.com

FROM FIELD

RECORD (JOIN FIELD)

Current Record

Content

USE TEMPLATE

TEMPLATE

CUSTOM

SUBJECT

This Item has an updated 'Prior 1 year sales'

BODY

Arial

The 'Prior 1 year sales' has just been updated on this record.

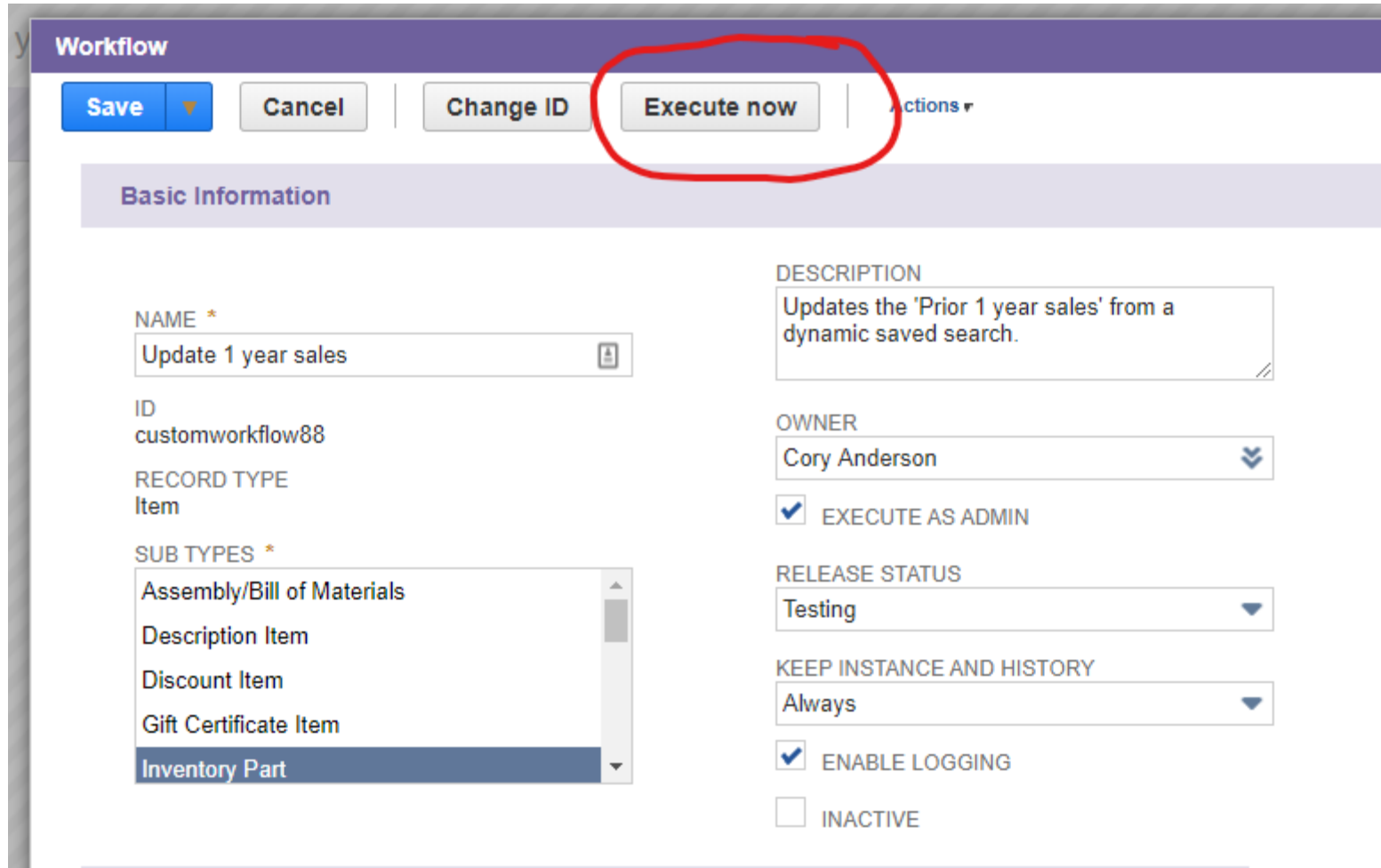
INCLUDE VIEW RECORD LINK

Attachment

FILE

'EXECUTE NOW' TO TEST

The Workflow will run on 20 records for testing



The screenshot shows a workflow configuration interface. At the top, there is a purple header bar with the word "Workflow" on the left. Below the header, there is a row of buttons: "Save" (blue), "Cancel" (grey), "Change ID" (grey), "Execute now" (grey, circled in red), and "Actions" (grey with a dropdown arrow). Below the buttons is a section titled "Basic Information" in a light purple bar. The form contains several fields and options:

- NAME ***: A text input field containing "Update 1 year sales".
- ID**: A text input field containing "customworkflow88".
- RECORD TYPE**: A text input field containing "Item".
- SUB TYPES ***: A list box with the following items: "Assembly/Bill of Materials", "Description Item", "Discount Item", "Gift Certificate Item", and "Inventory Part" (which is highlighted).
- DESCRIPTION**: A text area containing "Updates the 'Prior 1 year sales' from a dynamic saved search."
- OWNER**: A dropdown menu showing "Cory Anderson".
- EXECUTE AS ADMIN
- RELEASE STATUS**: A dropdown menu showing "Testing".
- KEEP INSTANCE AND HISTORY**: A dropdown menu showing "Always".
- ENABLE LOGGING
- INACTIVE

SET WORKFLOW TO 'RELEASED'

Workflow

Save | Cancel | Change ID | Execute now | Actions ▾

Basic Information

NAME *
Update 1 year sales

ID
customworkflow88

RECORD TYPE
Item

SUB TYPES *
Assembly/Bill of Materials
Description Item
Discount Item
Gift Certificate Item
Inventory Part

DESCRIPTION
Updates the 'Prior 1 year sales' from a dynamic saved search.

OWNER
Cory Anderson

EXECUTE AS ADMIN

RELEASE STATUS
Released

KEEP INSTANCE AND HISTORY
Always

ENABLE LOGGING

INACTIVE

THANK YOU!

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NetSuite Implementation, Consulting, and Support

