



# TIPS & TRICKS

**Margie Komninos**

PlantScan Corporation & P/T NS Consultant

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## Custom Sublists

(attaching saved search results to transactions or entry forms )

# What are Custom Sublists?

- Method to add a custom sublist to any transaction or entry form
- Uses saved search results to create the sublist
- Displays on transaction forms and entry forms - standard and custom records

## Notes:

- Ability to create is determined by the **Custom Sublists** permission or as System Admin
- Still need permission to see underlying records or results will show nothing

# Examples of Use

- List fulfillments on the Invoice record (doesn't normally show)
- List Invoices & Credit Memos on a customer record, highlighting past due (to isolate the important records and provide highlighting)
- List current BOM on an assembly record (eliminating clutter due to obsolete items showing)
- List Item receipts with **additional** fields on a item receipt sublist in a PO record (normal Receipts & Bills subtab can't be modified)
- List other customer with same sales rep on a Customer record
- List case records on an item record
- List Inventory Count records on an Inventory Adjustment record
- List information from a custom record on a transaction or entry form (provided they are linked)
- List project expenditures in detail on a project record

# Steps to Create a Custom Sublist

## 1. Create a saved search

- Make public
- Must have filter that ties it to the record where you want to have it displayed
  - Examples: Created From: Internal ID (for transactions that are related to another transaction – PO, SO)
  - Example: Name (for transactions tied to a customer)
- The **first** filter is the one that is used to tie it to the record and must be a **list/record type field**
- If first filter is not list/record type then it won't show as available for sublist
- Recommend that you test by showing filter and run search before next step

## 2. Page:Sublists to assign search, and where it should show

**Custom Sublists** customization > Forms > Sublists

Transaction	Entity	Item	CRM	SEARCH*	LABEL*	TRANSLATION	TAB	PURCHASE	SALE	OPPORTUNITY	MON	CUSTOM TRANSACTIONS	FIELD
**sublist	item			item receipt for PO - MK	receipts		Items	Yes					
**sublist	item			item receipt & Bill for PO - MK	receipts & bills		Items	Yes					
**Sublist - Related Fulfillments	Fulfillment link						Related Records Custom	Yes					Created From
**Sublist - Items in Fulfillments	Items Fulfilled						Related Records Custom		Yes				Created From

**Caution:** Shows on SO and invoice, so might want to create a subtab for it to appear on

**Caution:** Sometimes this auto populates and you must remove it

# Example: Saved Search

sublist on Customer record of all Invoices and CM (highlight past due)

## Saved Transaction Search

List Search Copy 1

\*\*sublist - customer invoices and CM

### Criteria

FILTER *	DESCRIPTION *	FORMULA
Type	is any of Invoice, Credit Memo	
Main Line	is true	

### Results

#### Columns ()

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TI
:: Date								
:: Due Date/Receive By								
:: Status								
:: Type								
:: Document Number								
:: Memo								
:: Amount								

### Highlighting

CONDITION *	IMAGE	TEXT COLOR	BACKGROUND COLOR	BOLD	DESCRIPTION	TRAI
:: Due Date/Receive By is before today AND Status is Invoice:Open			<input type="checkbox"/>	Yes	PAST DUE	

### Available Filters

FILTER *	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT	LABEL	TRANSLATION
:: Name				

# Example: Associated Sublist Entry

sublist on Customer record of all Invoices and CM (highlight past due)

## Custom Sublists


Save



Cancel

Transaction	Entity	Item	CRM						
SEARCH *	LABEL *	TRANSLATION	TAB	CUSTOMER	VENDOR	EMPLOYEE	FIELD		
:: **sublist - customer invoices and CM	Invoice & CM		General	Yes					

# Example: Results

sublist on Customer record of all Invoices and CM (highlight past due)

Customer   ← → List View Dashboard Search

[Edit](#) [Back](#) [Accept Payment](#)   [Actions](#) StickyNotes  New: ■ ■ ■



CUSTOMER ID  CUSTOMER IS INACTIVE  WHICH FORM

[General](#) [Info](#) [Qualification](#) [Web Activity](#) [Address](#) [Financial](#) [Access](#) [Custom](#) [Target Marketing](#) [Relationship Marketing](#) [Warranty](#) [Workflow](#)

[Transactions](#) • [Contacts](#) [Activities](#) [User Notes](#) [System Notes](#) • [Messages](#) [Opportunities](#) [Items](#) • [Cases](#) • [Files](#) [Campaigns](#) [Subscriptions](#) • [Subcustomers](#) [Subscription\\_Message History](#) [Jobs](#) [Upsell](#) [Invoice & CM](#)

EDIT	DATE	DUE DATE/RECEIVE BY ▼	STATUS	TYPE	DOCUMENT NUMBER	MEMO	AMOUNT
<a href="#">Edit</a>	11/4/2020		Fully Applied	Credit Memo	1047-2020	Consulting and training	-15.00
<a href="#">Edit</a>	11/4/2020		Fully Applied	Credit Memo	1048-2020	3 psx-gn for ENRZ	-10.00
<a href="#">Edit</a>	12/17/2020	1/18/2021	Open	Invoice	04-1011-2020	Consulting & Training with PO 35	5,325.00
<a href="#">Edit</a>	12/23/2020	1/18/2021	Open	Invoice	04-1012-2020	Consulting & Training with PO 35	5,325.00
<a href="#">Edit</a>	12/17/2020	1/15/2021	Open	Invoice	04-1010-2020	5 ENZ-4000	2,475.00
<a href="#">Edit</a>	10/1/2020	10/30/2020	Paid In Full	Invoice	04-1008-2020	3 psx-gn for ENRZ	2,250.00
<a href="#">Edit</a>	10/1/2020	10/30/2020	Paid In Full	Invoice	04-1009-2020	Consulting and training	5,625.00
<a href="#">Edit</a>	2/24/2020	2/24/2020	Paid In Full	Invoice	04-2870-2020	2 PSX-GN chargers, enrz-4000GN and ENRZ-1200	4,235.00
<a href="#">Edit</a>	1/17/2020	1/20/2020	Paid In Full	Invoice	04-2851-2020	Energize labels and Setup	8,090.00
<a href="#">Edit</a>	10/24/2019	10/24/2019	Paid In Full	Invoice	04-1011-2019	1PSX-GN Ultrasonic Leak Detector	2,932.00
<a href="#">Edit</a>	10/15/2019	10/15/2019	Paid In Full	Invoice	04-2816-2019	RMA081119 PSX-WR G5708 & RMA092619 PSX-GN 92-1505-0002	525.00
<a href="#">Edit</a>	8/8/2019	8/8/2019	Paid In Full	Invoice	04-1007-2019	2 VPX-GN for Winkler in Sweden	5,658.00
<a href="#">Edit</a>	6/3/2019	6/3/2019	Paid In Full	Invoice	04-1006-2019	1 ps-1100 kit Daniel Winkler	1,308.00

PAST DUE

[Edit](#) [Back](#) [Accept Payment](#)   [Actions](#)

# Example: Saved Search

sublist on Invoice to show item fulfillments

because you can't see item fulfillments from Invoice (only from SO)

## Saved Transaction Search

List Search Copy to

### \*\*Sublist - Related Fulfillments

Save Reset Cancel Preview New Template Pivot Report Change ID Actions

SEARCH TITLE \*\*Sublist - Related Fulfillments  
ID customsearch\_relatedfulfillments\_2  
OWNER Margery A Komninos  
PUBLIC   
AVAILABLE AS LIST VIEW

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

### Criteria

FILTER*	DESCRIPTION*	FORMULA
Type	is Item Fulfillment	
Main Line	is true	

### Results

Columns ()

Remove all Add Multiple

FIELD*	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL
Date								
Document Number								
Memo								

### Available Filters

FILTER*	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT	LABEL	TRANSLATION
Created From : Internal ID				



# Example: Associated Sublist Entry

sublist on Invoice to show item fulfillments

## Custom Sublists

Save

Cancel

Transaction	Entity	Item	CRM						
SEARCH *	LABEL *	TRANSLATION	TAB	PURCHASE	SALE	OPPO	CUSTOM TRANSACTIONS	FIELD	
:: **sublist item receipt for PO - MK	item receipts		Items	Yes					
:: **sublist item receipt & Bill for PO - MK	item receipts & bills		Items	Yes					
:: **Sublist - Related Fulfillments	Fulfillment link		System Information		Yes				Created From
:: **Sublist - Items in Fulfillments	Items Fulfilled		Related Records Custom		Yes				Created From
:: **Sublist - Related Fulfillments	Fulfill link		Items		Yes				Created From
:: **sublist - prod release records -custom	Product Rel Records		Related Records Custom	Yes					

# Example: Results

sublist on Invoice to show item fulfillments

**Invoice** ← → List Search

**04-2957-2020R** Bacharach **PAID IN FULL**

Edit Back Authorize Return Credit Print Actions StickyNotes New: Red Yellow Green

CUSTOMER: JOI  CLASS   
DATE 12/24/2020 MEMO x-probe tube decals  
INVOICE NO. 04-2957-2020R PO S ACK   
SALES ODER Sales Order #2105-2020 REQUIRED DATE (TEXT) 12/31/20  
OPPORTUNITY LINK2PO  
TERMS Net 30  
DUE DATE 1/23/2021  
CUST. PO # 44239  
SALES REP

Summary	
SUBTOTAL	700.00
TRANSACTION DISCOUNT	
TAX	
SHIPPING COST	0.00
TOTAL	700.00
AMOUNT DUE	0.00

Items Address Shipping Payment Messages History Workflow warranties Related Records

COUPON CODE  TAXABLE   
PROMOTION  TAX   
TRANSACTION DISCOUNT  TAX %   
RATE

Cases Fulfill link Items 700.00

EDIT	DATE ▼	DOCUMENT NUMBER	MEMO
<a>Edit</a>	12/23/2020	2837-2020	ship date BACH - 200 x-probe decals
<a>Edit</a>	12/18/2020	2838-2020	ship date BACH - 200 x-kit tubes

# Example: Saved Search

sublist on custom record (product release for BPOs) to show all releases on that PO

ORACLE NETSUITE **PLANTSCAN**

Activities Search/Reporty by Category **Transactions** Lists Reports Analytics Documents Setup Customization Shortages & Rec

## Saved Transaction Search

\*\*sublist - product release PO

**Criteria**

FILTER *	DESCRIPTION *
Type	is Purchase Order
BLANKET PO (Custom Body)	is true
Name	is DPP
Main Line	is true

**Results**

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM
Product Release : Ship Date WO						
Date						
Document Number						
Name						
Product Release : Item ID						
Product Release : Item Name						
Product Release : Item WO						
Product Release : PO#						
Product Release : Product ID						
Product Release : Product Name						
Product Release : QTY WO						

**Available Filters**

FILTER *	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT
Product Release : TRX WO	Yes	

# Example: Associated Sublist Entry

sublist on custom record to show associated POs

## Custom Record Type

Copy to Acco

### Product Release

Save Cancel Reset Change ID Actions

\* NAME

ID

INTERNAL ID

OWNER

DESCRIPTION

INCLUDE NAME FIELD

SHOW ID

SHOW CREATION DATE  ON RECORD  ON LIST

SHOW LAST MODIFIED  ON RECORD  ON LIST

SHOW OWNER  ON RECORD  ON LIST  ALLOW CHANGE

ACCESS TYPE

ALLOW UI ACCESS

ALLOW MOBILE ACCESS

ALLOW ATTACHMENTS

SHOW NOTES

ENABLE MAIL MERGE

RECORDS ARE ORDERED

SHOW REMOVE LINK  ALLOW CHILD RECORD EDITING

ALLOW DELETE

ALLOW QUICK SEARCH

ALLOW QUICK

ENABLE SYSTEM I

INCLUDE IN GLOBAL S

INCLUDE IN SEARCH

ENABLE OPTI/LO

ENABLE INLINE EI

ENABLE NAME TRANSL

HIER

INA

SEARCH *	LABEL *	TRANSLATION	TAB	FIELD
**sublist - product release	Sublist Product Rel			TRX WO

# Example: Results

## sublist on custom record to show associated POs

### Product Release

← → L

[Edit](#)
[Back](#)

[Actions](#)
StickyNotes
New: ■ ■ ■

TRX ID <b>Purchase Order #05-2276-2019</b> VENDOR (ENTER FIRST) <b>DPP</b> ID <b>605</b> ITEM FROM PO <b>Touch Probe-Resonator 82-0001-0500</b> ITEM ID <b>82-0001-0500</b> ITEM NAME <b>Touch Probe-Resonator</b> QTY RELEASE <b>112</b>	SHIP DATE <b>2/8/2021</b> MEMO/OR AEM DETAIL SHIP TO <b>Superior</b> SHIP VIA <b>ground</b> SHIP TO ACCT <b>Superior</b> SHIPPED <input type="checkbox"/>	FOAM COUNT RETURNED LINE# PO QTY <b>2,200</b> PO STATUS <b>Purchase Order:Partially Received</b>
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[Custom](#)
[Workflow](#)

• TRX WO

EDIT	SHIP DATE	QTY	SHIPPED?	PRODUCT ID	ITEM NAME	SHIP TO
<a href="#">Edit</a>	3/8/2021	112	No	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	2/8/2021	112	No	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	1/12/2021	10	Yes	82-0001-0500	Touch Probe-Resonator	Radiautics
<a href="#">Edit</a>	12/7/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	11/2/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	10/23/2020	84	Yes	82-0001-0500	Touch Probe-Resonator	Bacharach
<a href="#">Edit</a>	10/5/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	8/3/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	7/6/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	6/4/2020	20	Yes	82-0001-0500	Touch Probe-Resonator	Radiautics
<a href="#">Edit</a>	6/1/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	3/17/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	3/17/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	2/3/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	1/15/2020	84	Yes	82-0001-0500	Touch Probe-Resonator	Bacharach
<a href="#">Edit</a>	1/6/2020	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	12/12/2019	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	11/22/2019	84	Yes	82-0001-0500	Touch Probe-Resonator	Bacharach
<a href="#">Edit</a>	10/7/2019	112	Yes	82-0001-0500	Touch Probe-Resonator	Superior
<a href="#">Edit</a>	8/12/2019	84	Yes	82-0001-0500	Touch Probe-Resonator	Bacharach
<b>Total</b>		<b>1934</b>				

# Q&A

