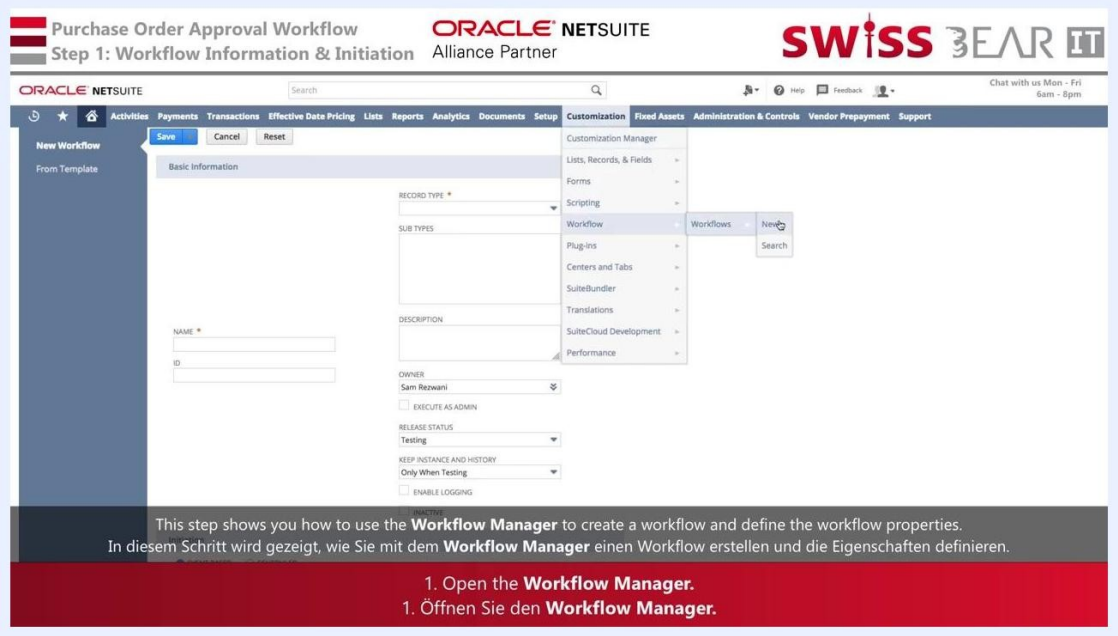
How to Create a Workflow in NetSuite

This guide walks you through how to create a workflow in NetSuite using the Workflow Manager. Using a Purchase Order approval process as an example, you'll learn how to define workflow properties, build states, configure actions, set up transitions, and validate the finished workflow. The goal is to give you the practical steps and insights you need to design your own workflows in NetSuite.



Intro screen with text: "This video shows how to use NetSuite's Workflow Manager," and "The goal is to show you the workflow functionality and insights that will help you to design your own workflows." SWISS BEAR IT logo present.

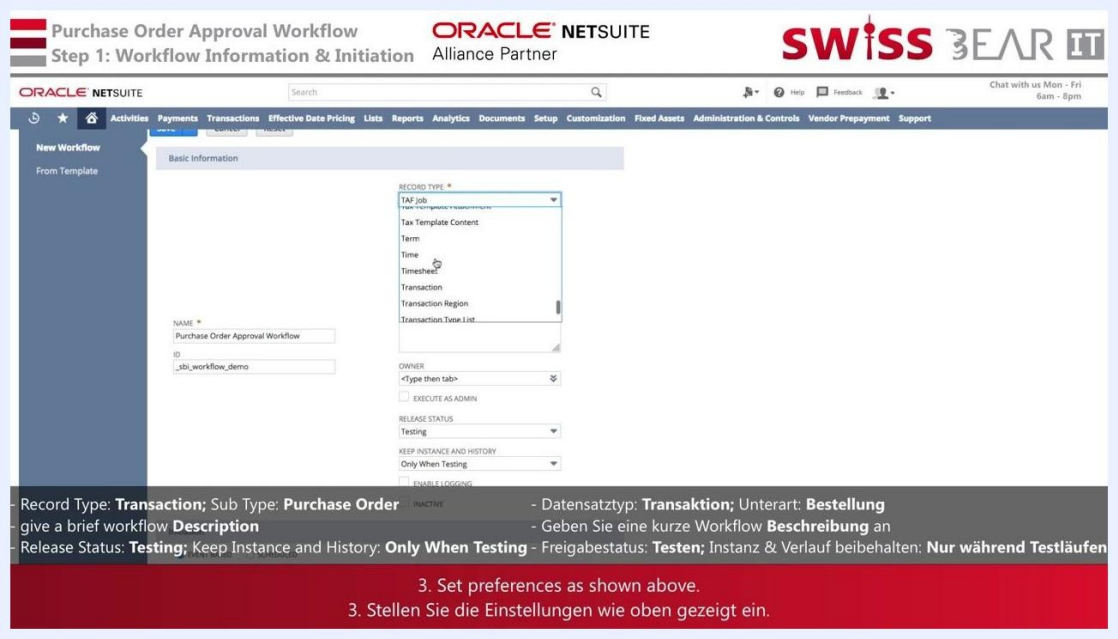
Step 1: Open Workflow Manager and set workflow properties

1. Navigate to Customization > Workflow > Workflows > New in the top menu. This opens the New Workflow creation screen.
2. Find the Owner field and select your name or the appropriate owner from the drop-down list. In this example, the owner is set to Carol Morgan. Optionally, check Execute as Admin if required.
3. Set the remaining workflow properties:

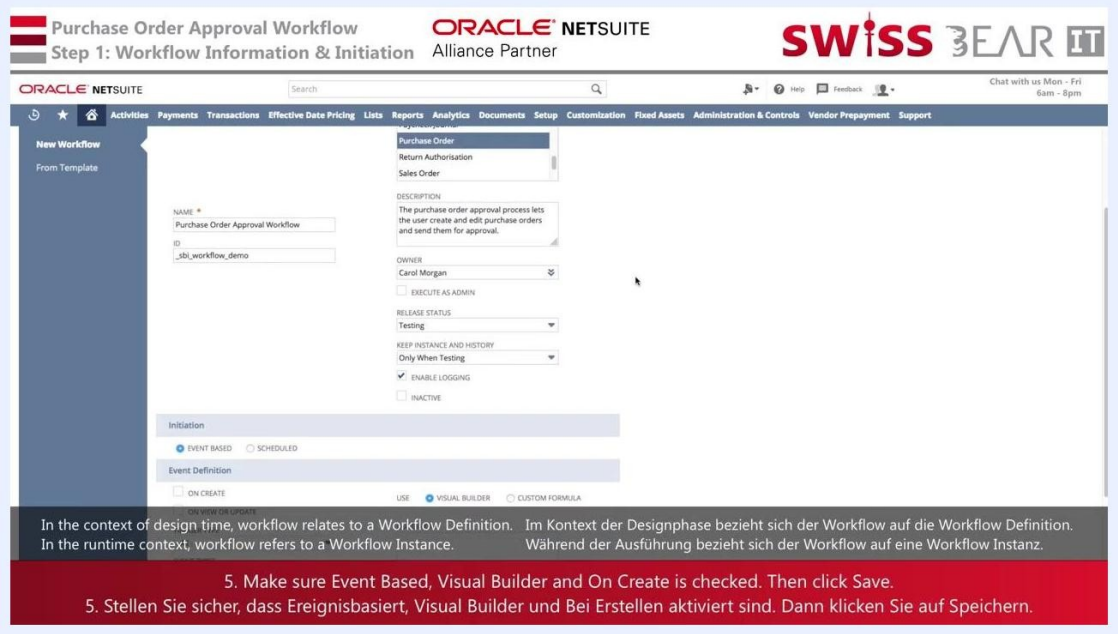
- Record Type: Transaction
- Sub Type: Purchase Order

- Name: Purchase Order Approval Workflow
- ID: _sbi_workflow_demo
- Description: The purchase order approval process lets the user create and edit purchase orders and send them for approval.
- Release Status: Testing

- Keep Instance and History: Only When Testing



NetSuite Workflow Manager screen with the navigation path highlighted: Customization > Workflow > Workflows > New.



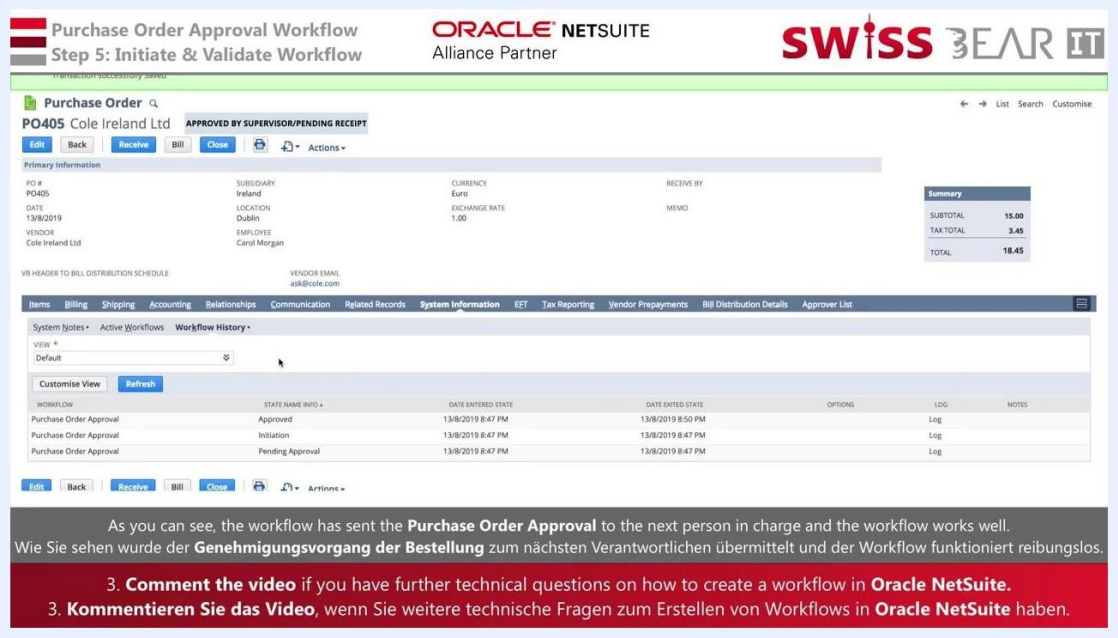
Workflow creation screen with all property fields filled in, including Record Type, Sub Type, Name, ID, Description, Release Status, and Keep Instance and History.

4. Configure how the workflow starts:

- Under Initiation, select Event Based.
- Under Event Definition, check On Create.
- Under Use, select Visual Builder.
- Click Save to create the workflow.

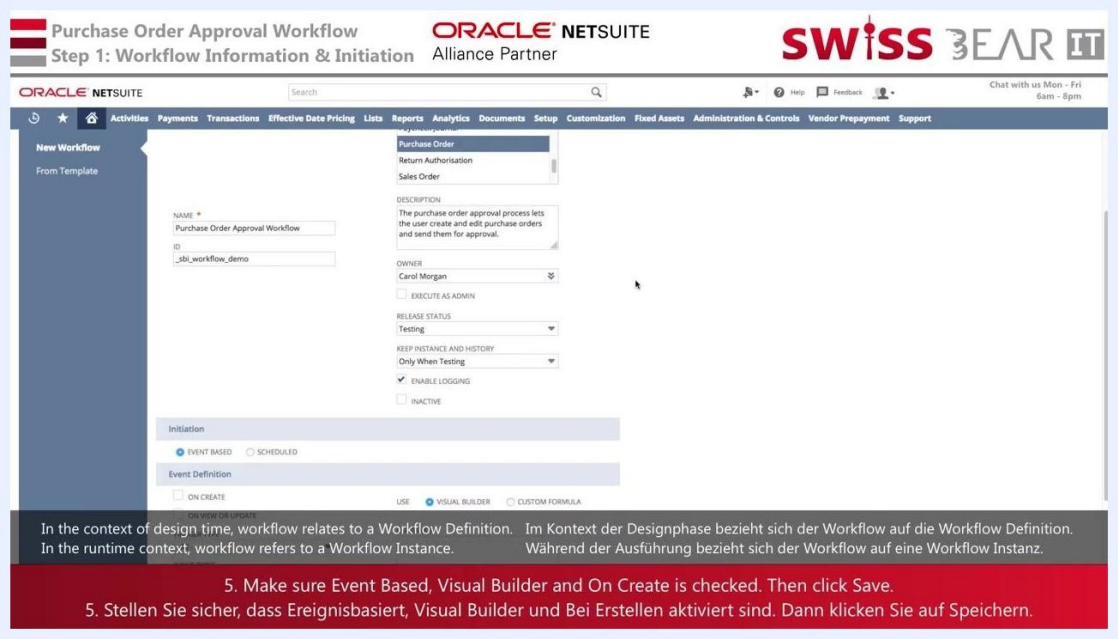
Step 2: Create workflow states

5. In the Workspace area, click New State to add each state your workflow needs. You must create states before you can add actions or transitions to them.



Contact and subscription information for Swiss Bear IT, encouraging viewers to reach out, subscribe, and provide feedback.

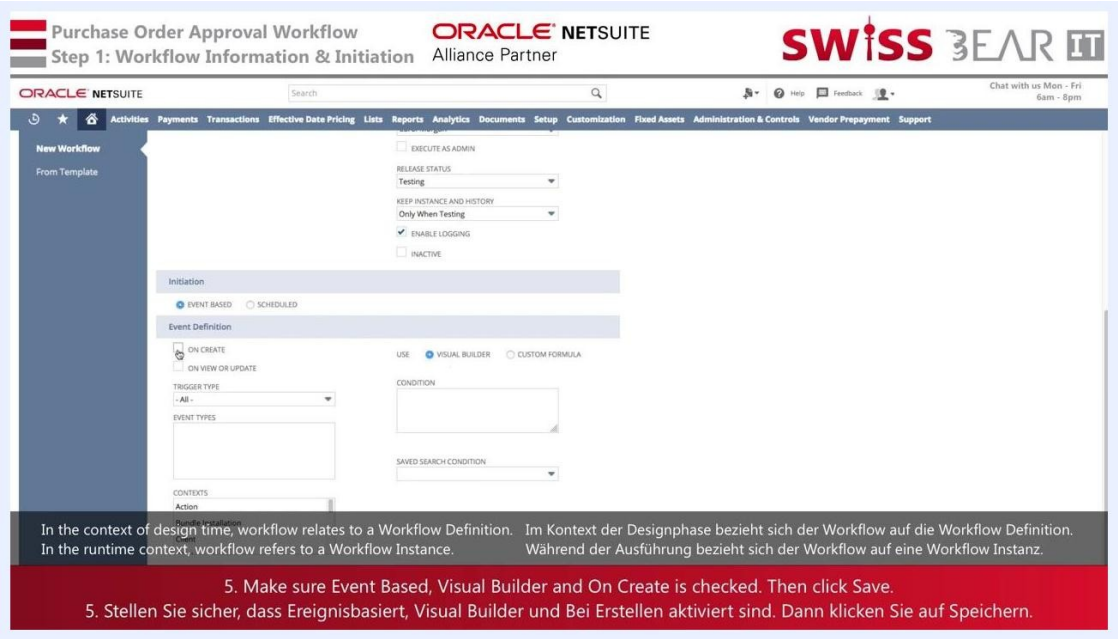
6. Drag and drop the state boxes to arrange them in the workspace as you like. This example uses four states — State 1, State 2, State 3, and State 4. It's best to create all the states you need during the initial design phase, then return to each one to add its actions and transitions.



Workspace screen with the New State button highlighted and an initial State 1 box present.

Step 3: Add actions to the initiation state

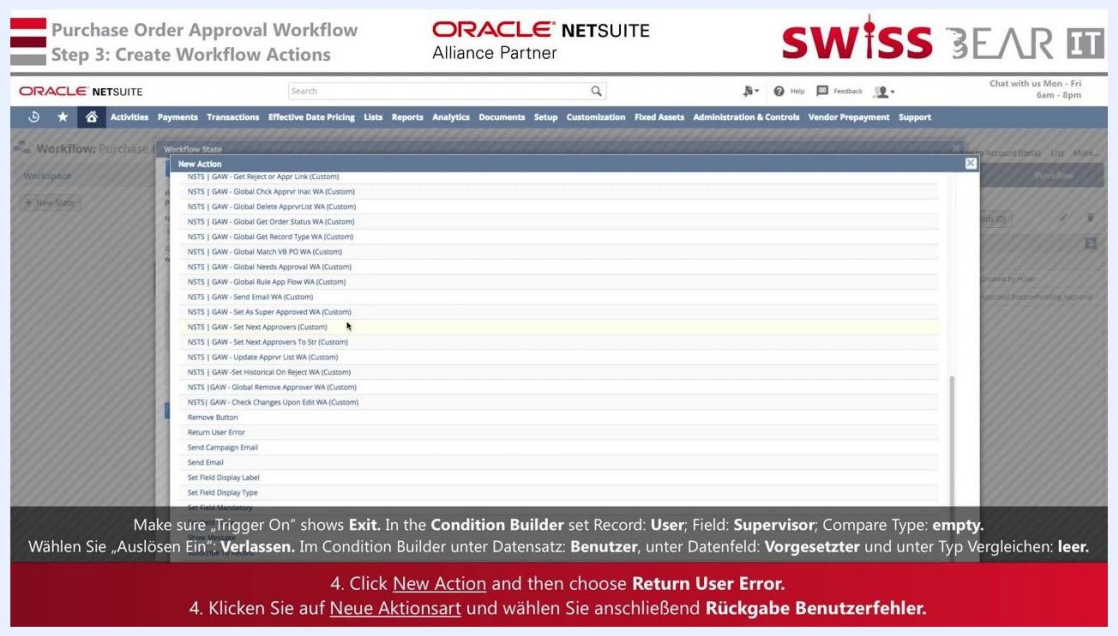
7. Double-click State 1, or select it and click Edit, to open the state properties. Change the Name field from State 1 to Initiation. Confirm that Start State is checked. The Actions tab shows options for Move To Top, Move To Bottom, New Action, New Group, and New Sublist Group, with no actions listed yet.



Workspace screen with four states (State 1, State 2, State 3, State 4) arranged using drag-and-drop.

8. Click New Action and choose Set Field Value. In the FIELD dropdown, select Created By and set the value to User. Set Trigger On to Entry. This ensures that when the workflow enters this state, the Created By field is automatically set to the current user.
9. Click New Action again and choose Set Field Value. Set the FIELD to Approval Status and the value to Pending Approval. Set Trigger On to Entry. This sets the approval status to pending as soon as the record enters the state.

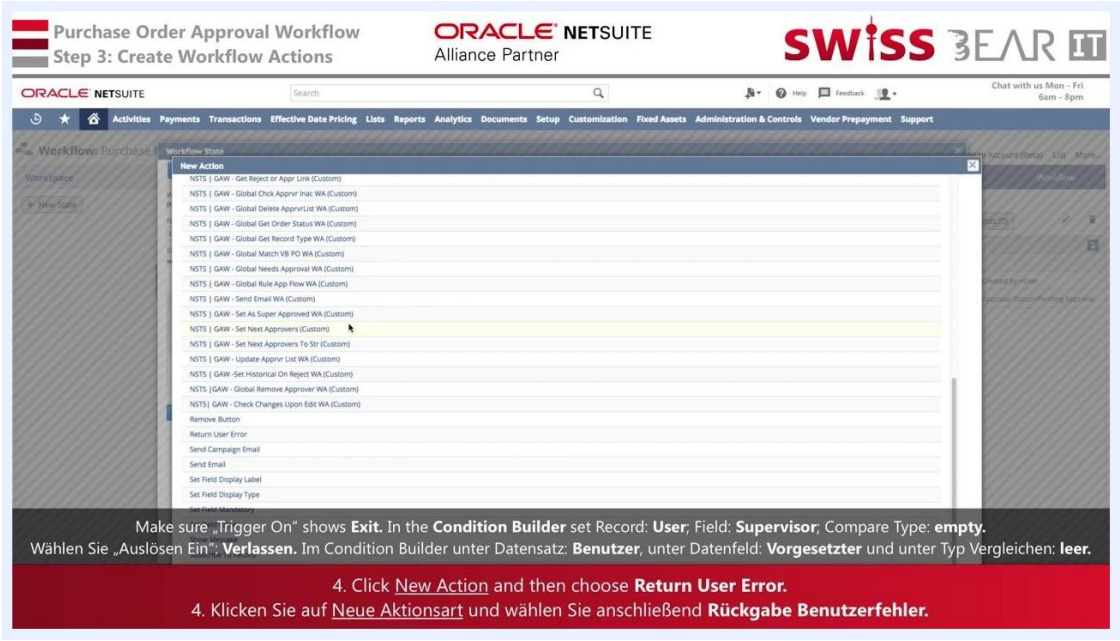
10. Click New Action and choose Return User Error to add a check for a missing supervisor. In the Workflow Condition window, set Trigger On to Exit, then in the Condition Builder set Record to User, Field to Supervisor, and Compare Type to empty. This triggers an error if the user has no assigned supervisor when trying to exit the state.



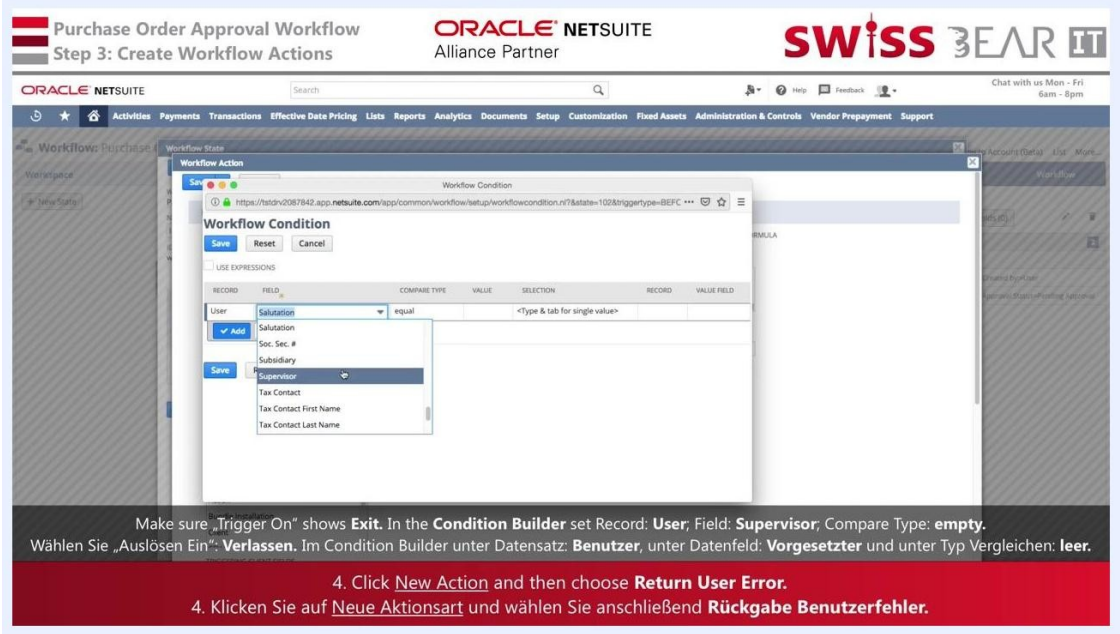
Workflow Action window with the FIELD dropdown expanded, showing "Created By" and "Created Date" options.

11. In the Return User Error action, enter the error message that should display to the user, for example: "You cannot send this purchase order for approval because you currently have no assigned supervisor." This message appears to any user who attempts to proceed without an assigned supervisor.

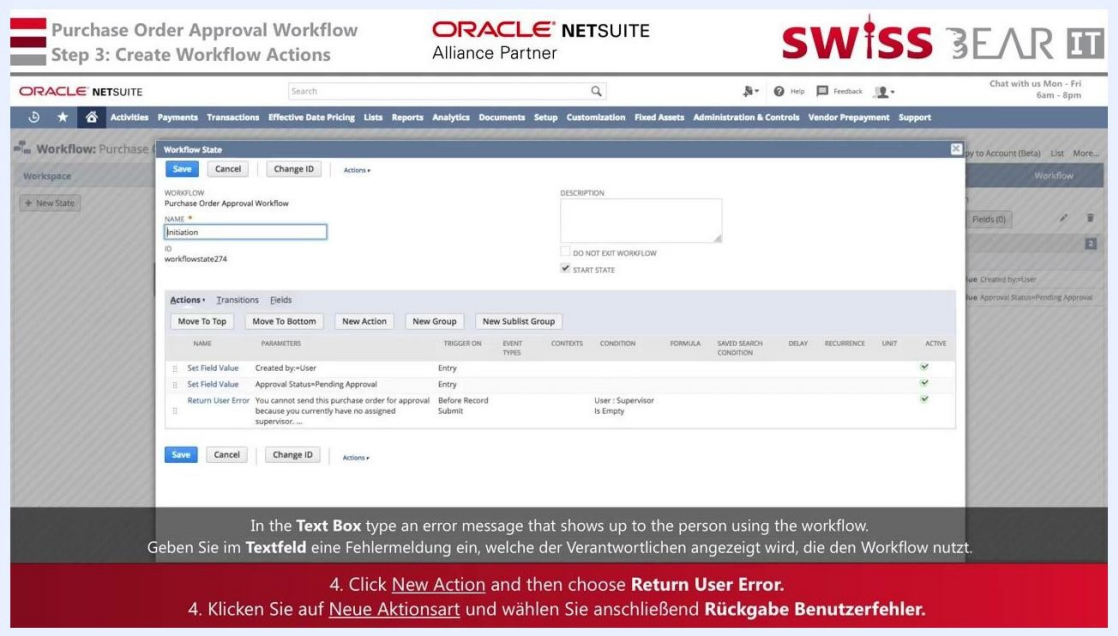
12. Click New Action and choose Set Field Value to define the next approver. Set Trigger On to Exit, and set the parameter Next Approver to User : Supervisor. This ensures that when exiting the state, the next approver is set to the current user's supervisor.



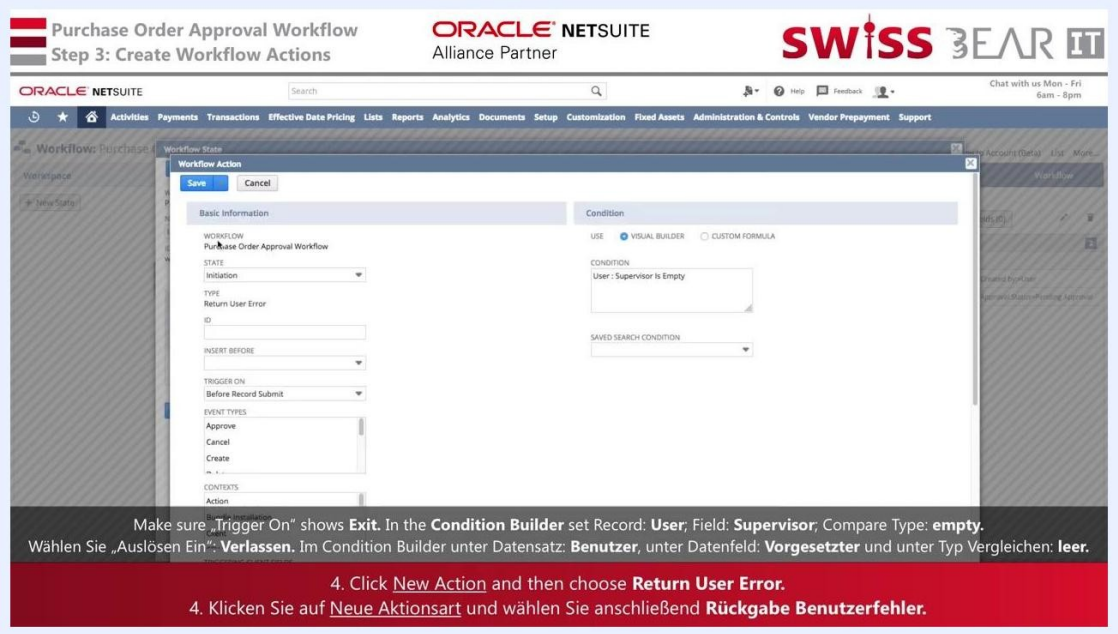
New Action window showing the list of available custom and standard actions.



Workflow Condition window with Record set to User and the Field dropdown expanded showing Supervisor highlighted.



Workflow State window listing three actions so far: Set Field Value for Created By, Set Field Value for Approval Status, and Return User Error with the Supervisor Is Empty condition.



Workflow Action window with the Trigger On dropdown expanded, showing Entry and Exit options.

Step 4: Configure buttons and field display types

13. Click New Action and select Add Button to give users a way to submit the record for approval. In the Workflow Action window, set Trigger On to Before Record Load. In the Parameters section, enter the Label as Submit for Approval, and make sure Save Record First is checked. This adds a "Submit for Approval" button to the workflow form and requires the record to be saved before submission.

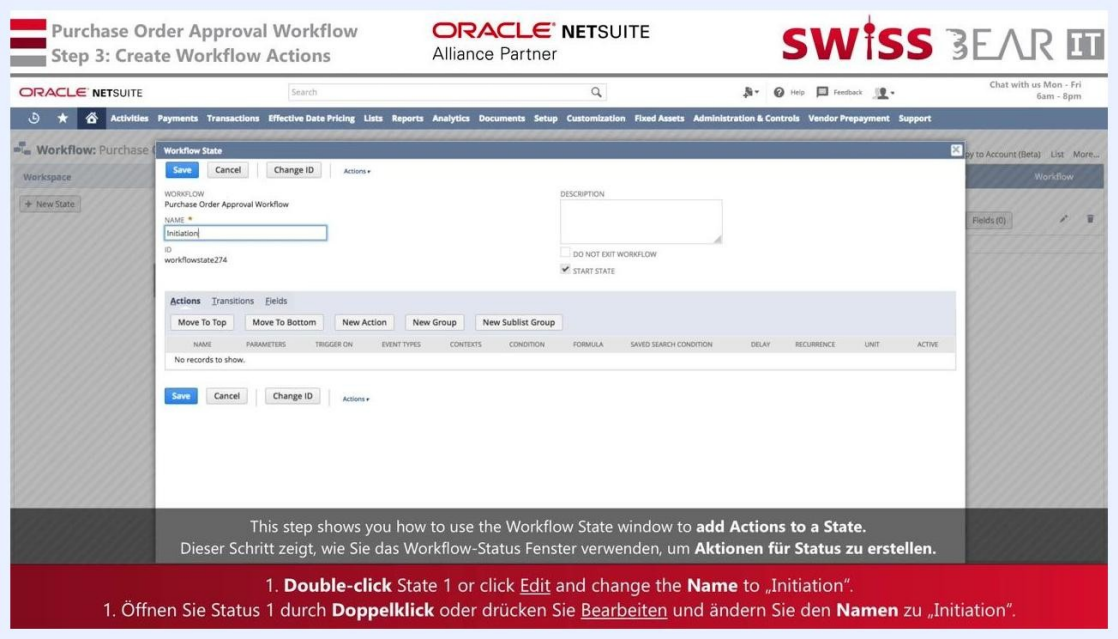
Workflow Action window with the Next Approver field selected and the Display Type dropdown visible.

14. Click New Action and choose Set Field Display Type to lock the Next Approver field. Set Trigger On to Before Record Load, select Next Approver as the field in the Parameters section, and set the Display Type to Disabled. This keeps the field visible but prevents users from editing it.
15. Repeat the same process for the Approval Status field: click New Action, choose Set Field Display Type, set Trigger On to Before Record Load, select Approval Status as the field, and set the Display Type to Disabled. This makes the field visible but not editable by users.
16. Review the full list of actions for the state to confirm everything is configured correctly:

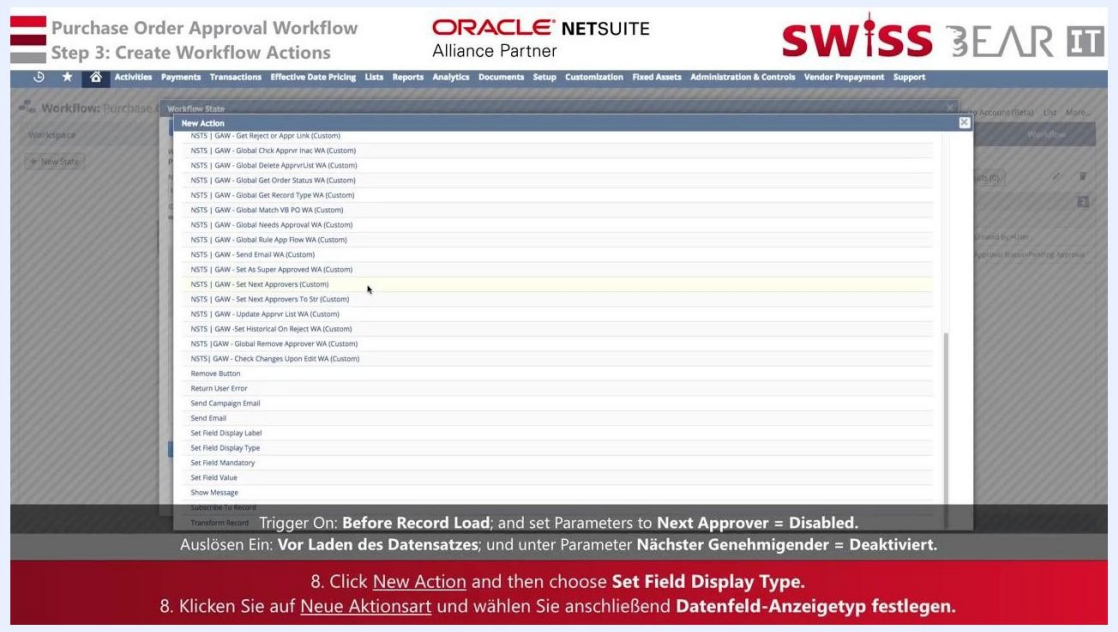
- Set Field Value: Created By = User (Entry)
- Set Field Value: Approval Status = Pending Approval (Entry)

- Return User Error: Supervisor is empty (Exit)
- Set Field Value: Next Approver = User : Supervisor (Exit)
- Add Button: Label = Submit for Approval, Save Record First (Before Record Load)
- Set Field Display Type: Next Approver = Disabled (Before Record Load)

- Set Field Display Type: Approval Status = Disabled (Before Record Load)

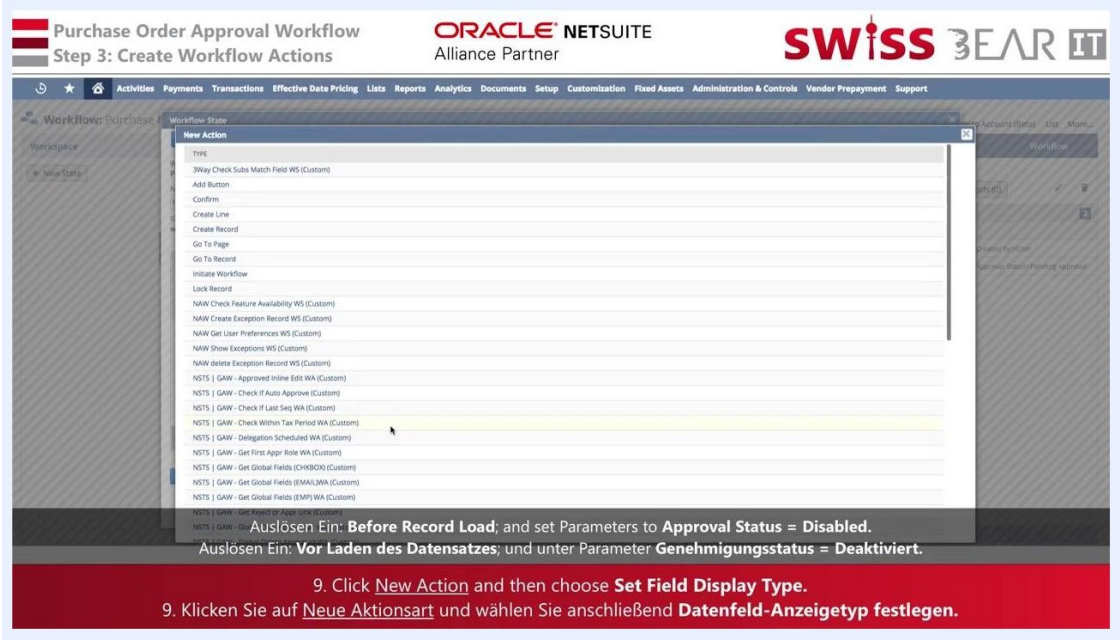


Workflow State window open, with the Name changed to Initiation and the Actions tab selected showing no actions yet.

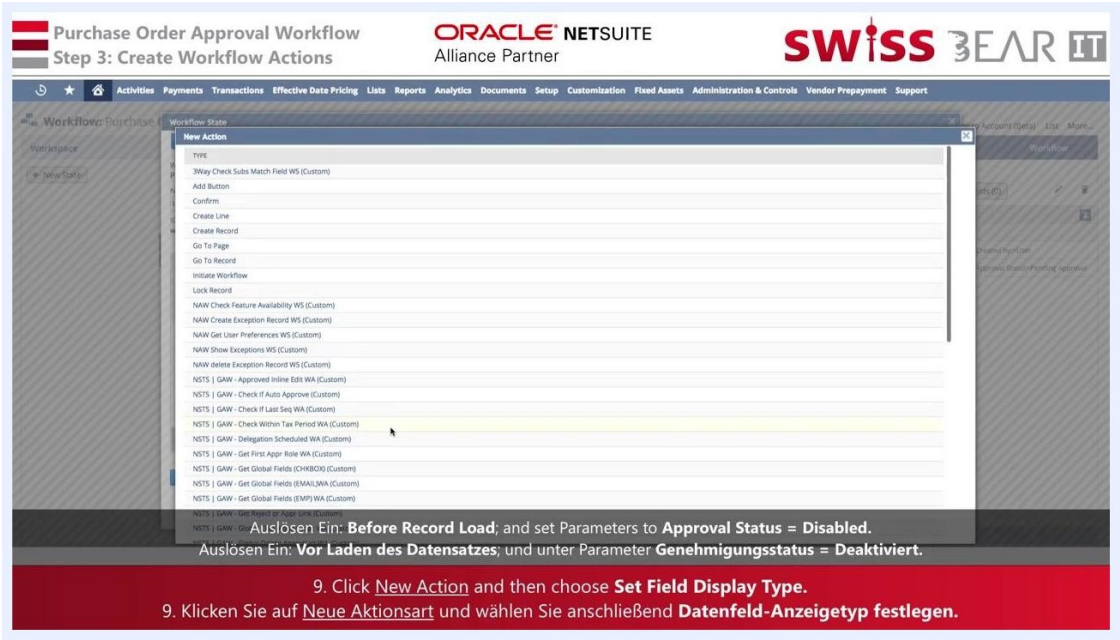


Workflow Action window with the Label set to "Submit for Approval," Save Record First checked, and Trigger On set to Before Record Load.

Confirm that Start State is checked, then click Save to store the state and its actions.



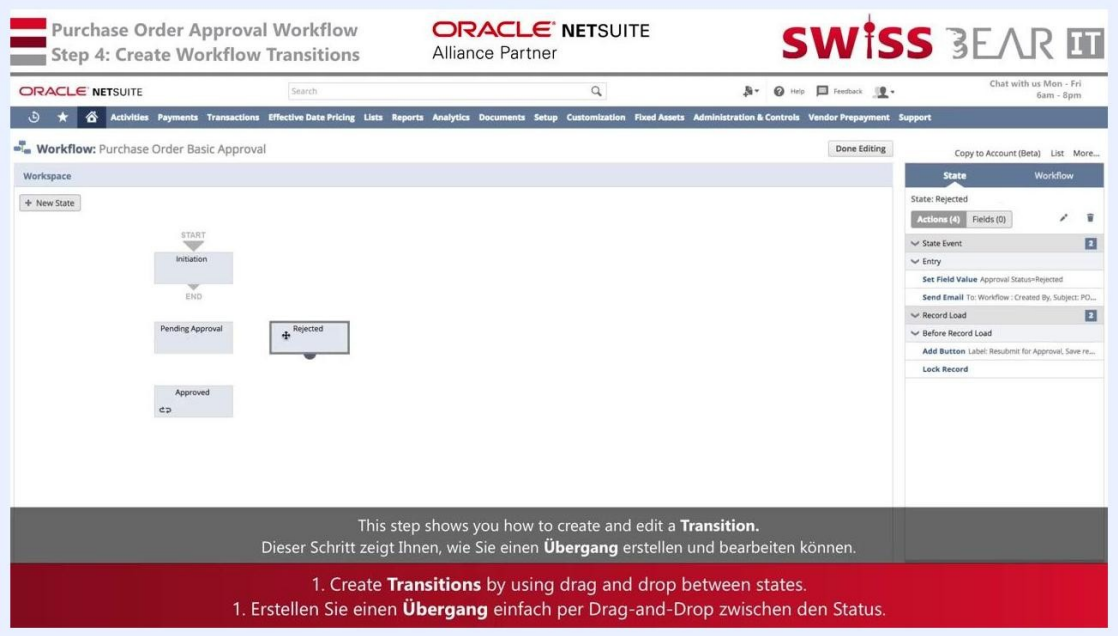
Workflow Action window with the Approval Status field selected and the Display Type dropdown visible.



Workflow State window showing all configured actions with Start State checked and the Save button highlighted.

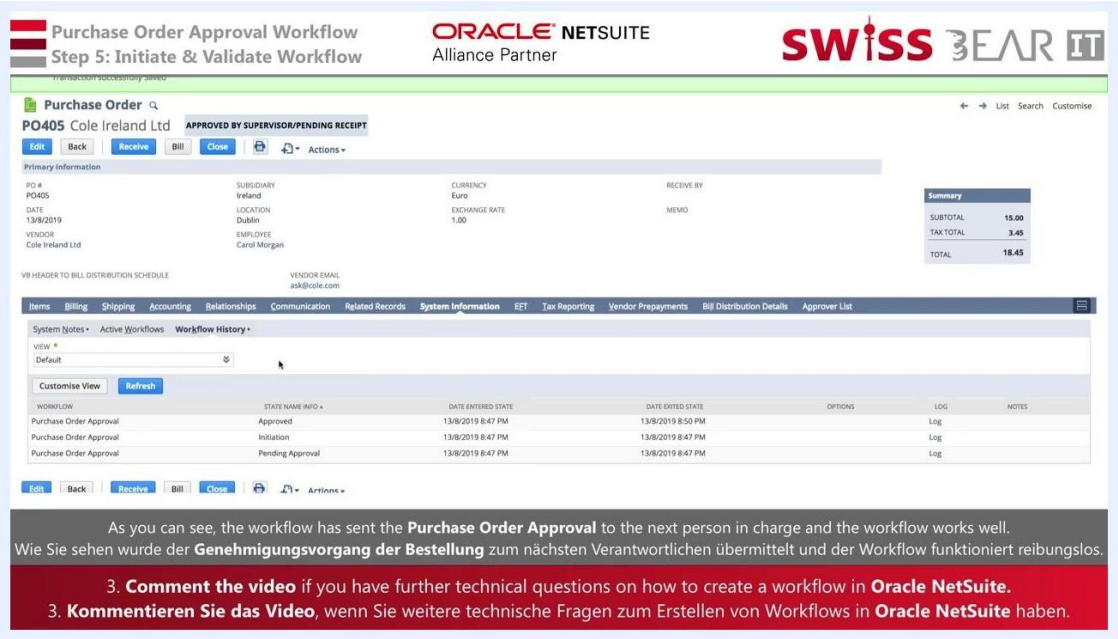
Step 5: Create transitions between workflow states

17. In the workflow workspace, view your state diagram — in this example, Initiation (Start), Pending Approval, Rejected, and Approved. Drag and drop between state boxes (for example, from Initiation to Pending Approval) to create a transition. This defines how records move between the different approval states.



Workflow workspace showing the state diagram with Initiation, Pending Approval, Rejected, and Approved states.

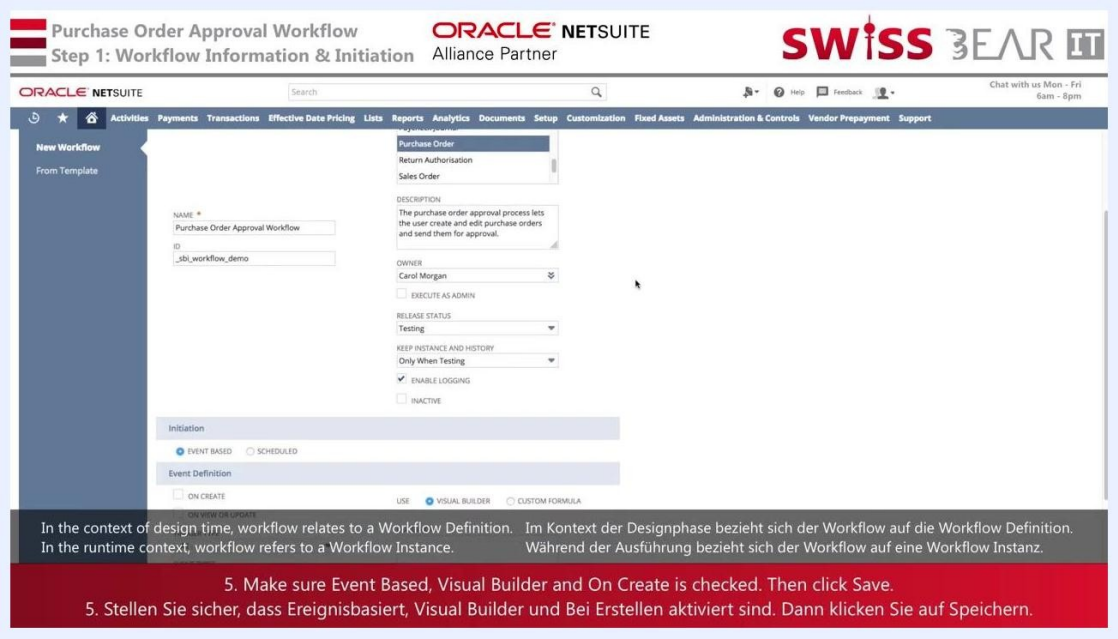
18. To add further transitions, hover over the End icon of a state (for example, "Pending Approval") and drag the arrow to another state (such as "Rejected" or "Approved"). Releasing the mouse creates the transition, and the last state you edit becomes the End state. The right panel shows the actions configured for each state as you work.



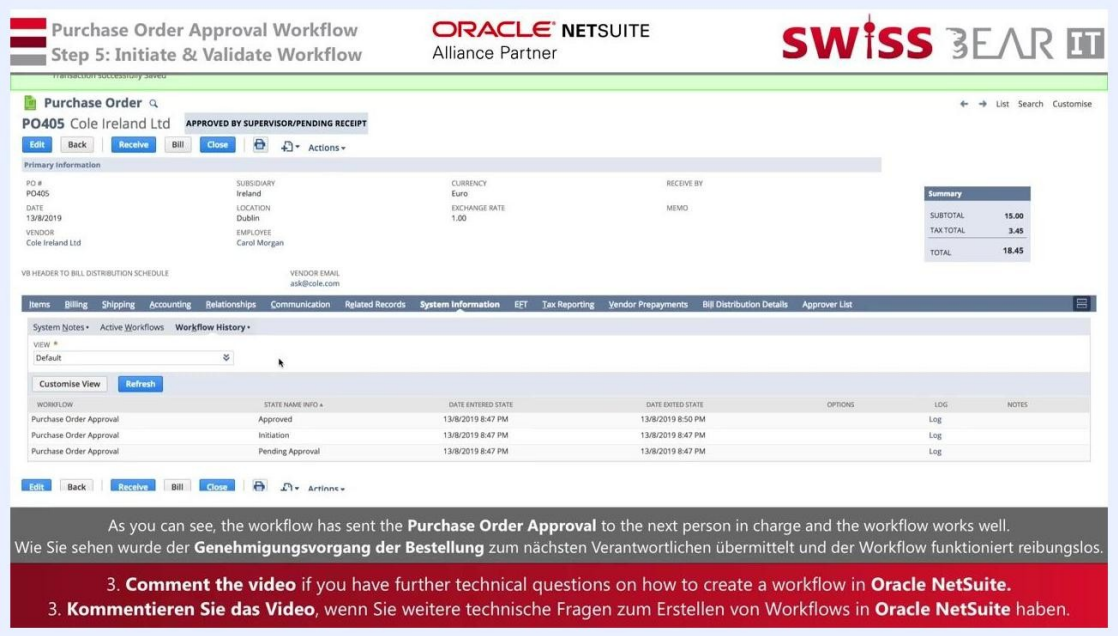
Workflow workspace with a transition arrow being dragged from Pending Approval to Rejected, with the right panel showing state actions.

Step 6: Initiate and validate the workflow

19. Open a purchase order record (for example, PO405 for Cole Ireland Ltd) and confirm the workflow status shown at the top, such as "APPROVED BY SUPERVISOR/PENDING RECEIPT." Review the Primary Information section for details like the PO number, date, vendor, employee, currency, and location. Navigate to the System Information tab, then click the Workflow History subtab to view the workflow's progress, including each state entered and exited with its date and time — for example, Initiation, Pending Approval, and Approved.



Workflow creation screen with Initiation set to Event Based, Event Definition set to On Create, and Visual Builder selected.

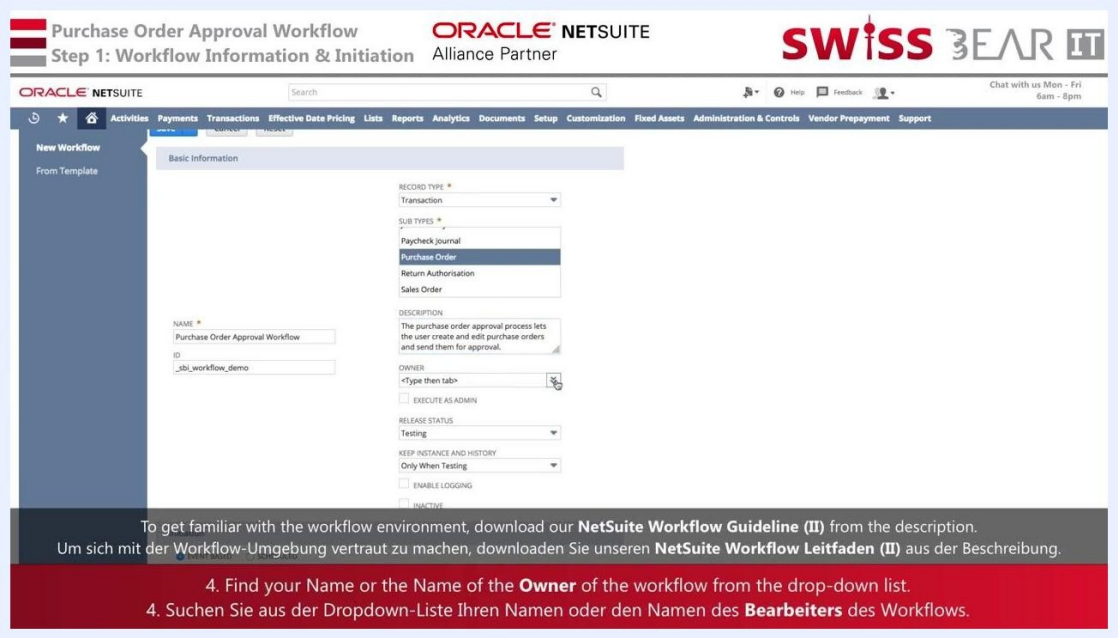


Purchase Order screen with the System Information and Workflow History tabs highlighted, showing workflow state transitions and timestamps.

20. In the Workflow History subtab, verify that the purchase order moved through the expected states, such as Initiation → Pending Approval → Approved. This confirms that the workflow sent the purchase order approval to the next person in charge and that it is operating correctly.

Summary

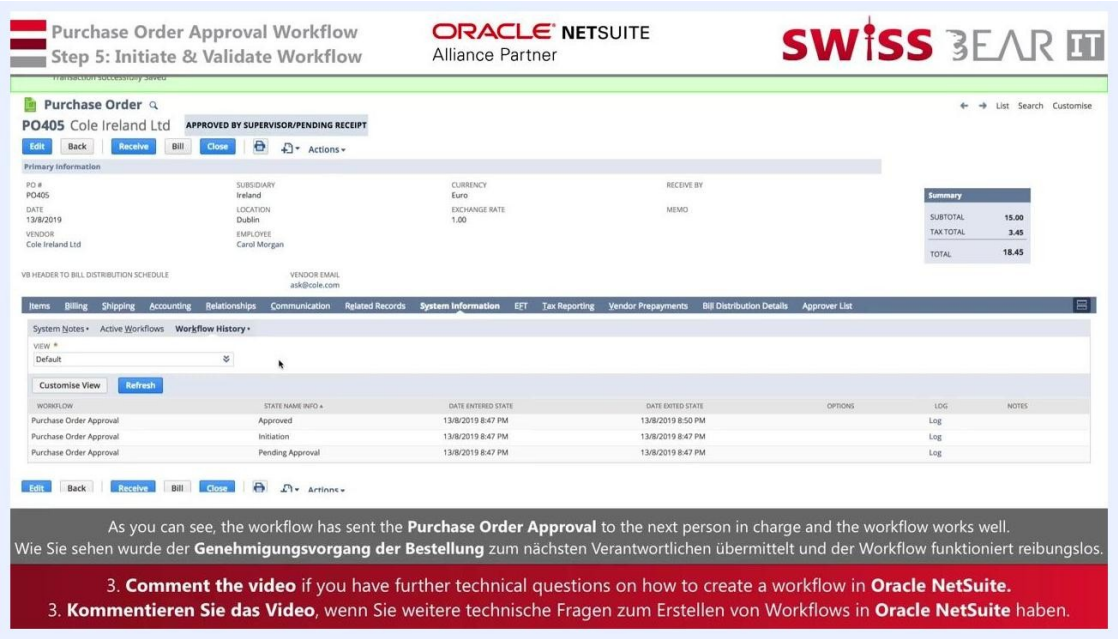
By following these steps, you have learned how to create a workflow in NetSuite for a purchase order approval process. You set up the workflow's properties and initiation settings, created and arranged states, configured actions to automate field values and enforce approval requirements, added a custom submit button, set field display types, built transitions between states, and validated the finished workflow on an actual purchase order record.



Workflow creation screen with the Owner field selected and filled in.

What's next

With the basic approval workflow in place, you can continue refining it by adding more states, actions, or transitions to match your organization's specific approval process. Review the Workflow History subtab regularly to confirm that records are moving through the states as expected.



Workflow History tab showing the state transitions, timestamps, and confirmation of the workflow's operation.