THE POWER OF BEING UNDERSTOOD

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NETSUITE TIPS & TRICKS

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Tip #1-4 – Keyboard Shortcuts

- Alt and type a letter to move to a subtab

- Math in amount fields (enter 20 + 30) or (100-70)/3

- Tab to move between fields (shift tab to move backwards)

- Crtl-F to find a value in a list or form

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Tip #6 – Quick close accounting periods

- Close one or more accounting periods with a single click
- Enable in accounting preferences

Manage Accounting Periods

| Set Up Full Year | New Year Only | New Quarter Only | Base Period | Close Multiple Periods |

➕ FILTERS

☐ SHOW INACTIVES

INTERNAL ID	PERIOD NAME	⊕ EXPAND ALL | ⊖ COLLAPSE ALL	CHECKLIST	PERIOD CLOSE
35	➕ FY 2015			
1	➕ FY 2016			
18	▬ FY 2017			

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Tip #7 – File Drag & Drop

- Bundle ID – 41309
- Drag and drop files to a NetSuite record
- Configure default folder rules

List   View Dashboard   Search   Customize   More

Drop files here. Click for more options.

File Drag and Drop
Launch the File Drag and Drop Tutorial to learn more about the feature.

Launch Tutorial   Close

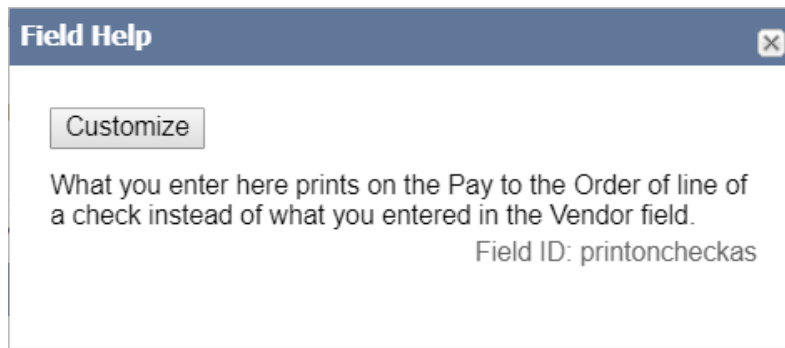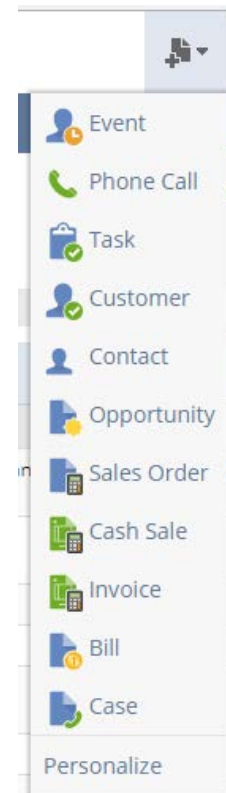☐ Don't show this message again

CUSTOM FORM

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Tip #8 – Customize field level help for standard fields

• Select customize from the field level help:
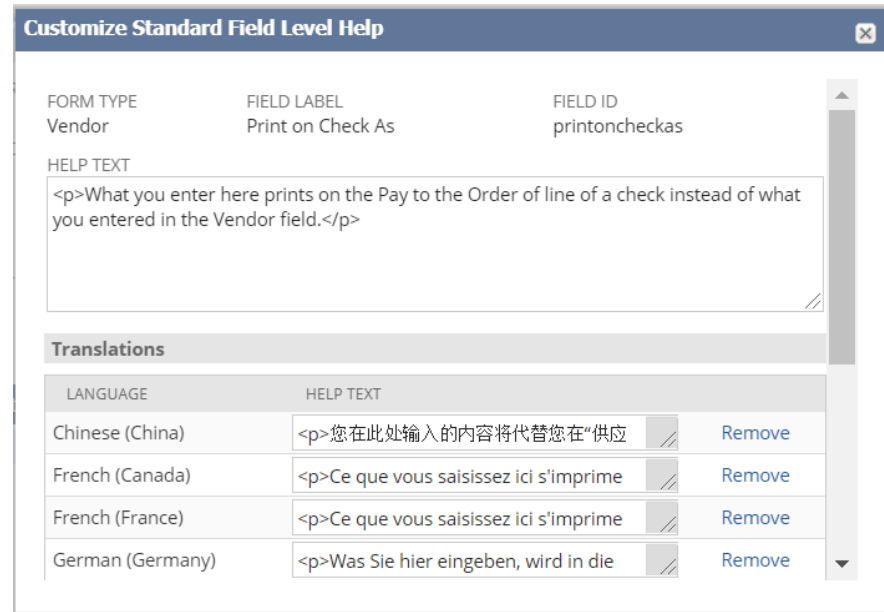
Tip #9 – Use the Create New menu

- Quick link to create new records

Tip #10 – Maximize User Preferences

- Number of rows in lists segments
- Maximum entries in dropdowns
- Show internal ids
- Configure NetSuite email signature
- Change color theme
- Auto fill transactions
- Alphabetize items regardless of type
- Show list when only 1 row result

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Tip #11 - SuiteSolutions

- Advanced Approvals
- Shared Vendor Bills
- Consolidated Invoicing
- Credit Card Re-Authorization
- Rebate Management
- Pay When Paid
- Vendor Prepayments
- Lot Traceability
- Effective Dated Pricing
- AR Deduction and Chargeback Management
- Project from Opportunity

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Tip #12 – User Shortcuts & Recent Records

- Shortcuts for commonly used functions. (Star:)

- Link to the records mostly recently viewed. (Clock:)

- Or display on your dashboard

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Tip #13 – Date Shortcuts

- t - today

- y - yesterday

- m - last day of month

- l - last day of previous month

- + increases by one day and – decreases by one day
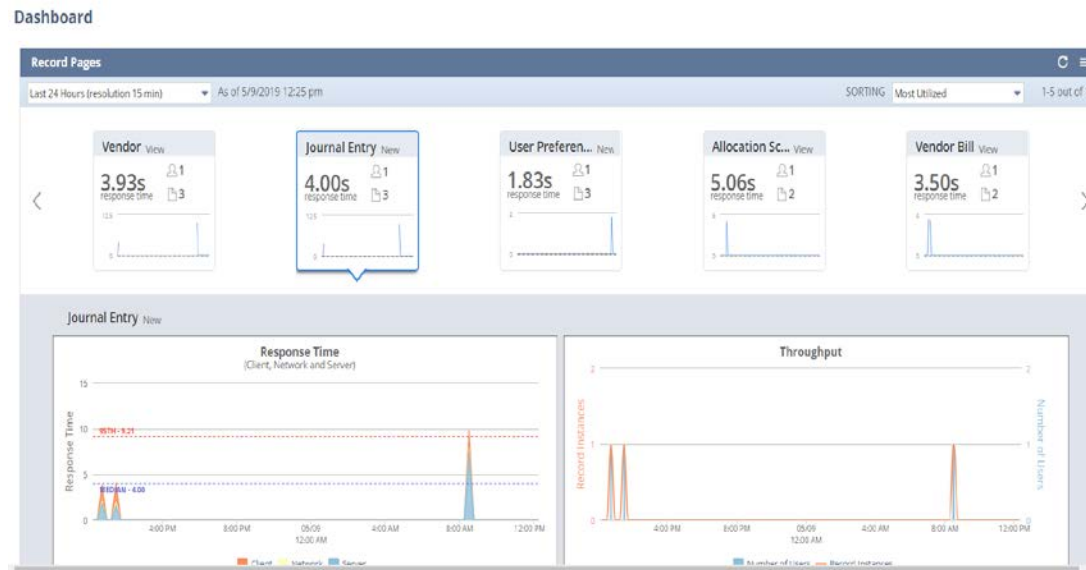
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Tip #14 - Global Search Prefixes

Prefix	Action
cus:	Returns only **customer** records.
	Example: **cus:smith** locates all customer records with Smith within its name.
v:	Returns only **vendor** records.
	Example: **v:Alpha** locates all vendor records with Alpha within its name.
sa:	Returns only **sales order** records.
	Example: **sa:76700** locates that specific record.
inv:	Returns only **invoice** records.
	Example: **inv:1152** locates that specific record.
pu:	Returns only purchase order records.
	Example: **pu:12900** locates that specific purchase order record.
con:	Returns only **contact** records.
	Example: **con:jones** locates all contact records with Jones within its name.
pa:	Returns a list of NetSuite pages.
	Example: **pa: sales orders** locates all reports and NetSuite pages containing 'sales order'
help:	Opens the NetSuite Help Centre and returns a list of help topics
	Example: **help:bank rec** locates all help documents for bank rec
sea:	Returns only saved search records.
	Example: **sea:open sales** locates all saved searches with open sales within its name.

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Tip #15 - Global Search Tips

- percentage % before and after a word to find anything that contains that word

- underscore _ replaces any letter

- quotation marks "" for exact text matches

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Tip #16 – NetSuite Performance Management

- Application Performance Management SuiteApp

- Status.netsuite.com

Q&A

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