BACK TO BASICS & REFRESHER TOPICS

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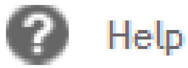
Agenda

- Help! - resources for NetSuite users and admins
- New Releases - tips for your company
- SuiteBundler – lot's of freebies
- Terminology Clarification
- Lead to Cash & Procure to Pay Overview
- Record Types (transaction and list)
  - Entity vs. Customer ….
  - Lists – viewing record types; customize list view; setting up filters
- Email Templates – which do I use?

◆ = advanced information

- Digging In
  - Home Page – Portlets
  - Global Search - Cool Tips
  - NetSuite Reporting - Tips for Reports/Saved Searches
  - Power of the System Notes
  - Getting data in/out and updated
- More Tips and Tricks
  - Where's Waldo
  - It's Sticky
  - Sending to Multiple Emails
  - Permissions violations
  - So Many Shortcuts
  - SuiteIdeas
  - Online User Groups – NetSuite, Slack, LinkedIn

NetSuite Help!! 

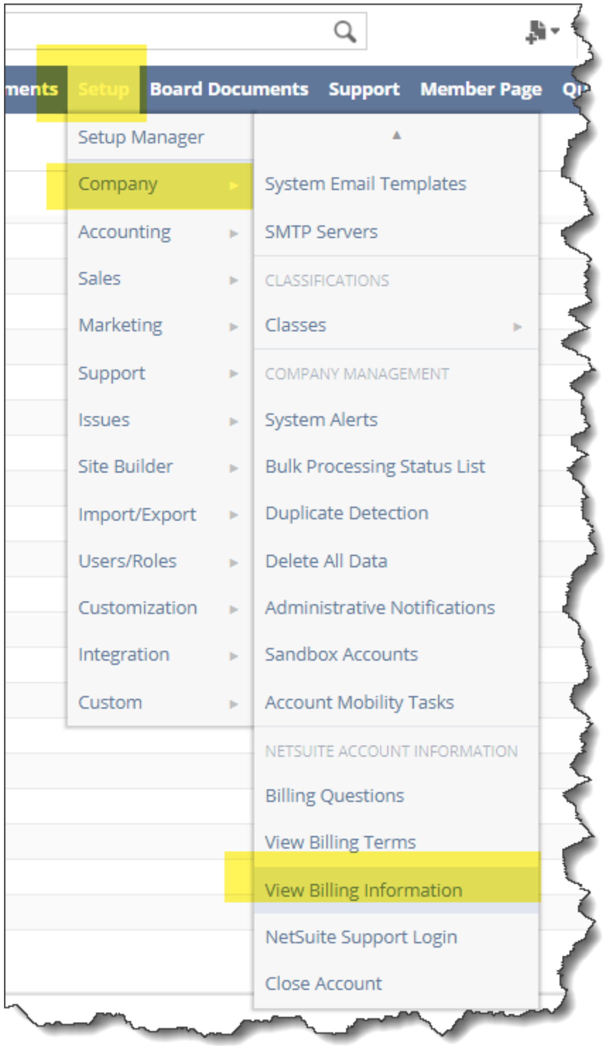
- How many user licenses have we used?
- NetSuite 

- NetSuite Account Center
- SuiteAnswers

◆ Find system outages/problems

Note: More help topics at end of presentation – NetSuite User Group, SuiteIdeas, Slack Professional Community, LinkedIn Resources, performance details for the page

How Many NS Seats Have We Used?



Billing Information

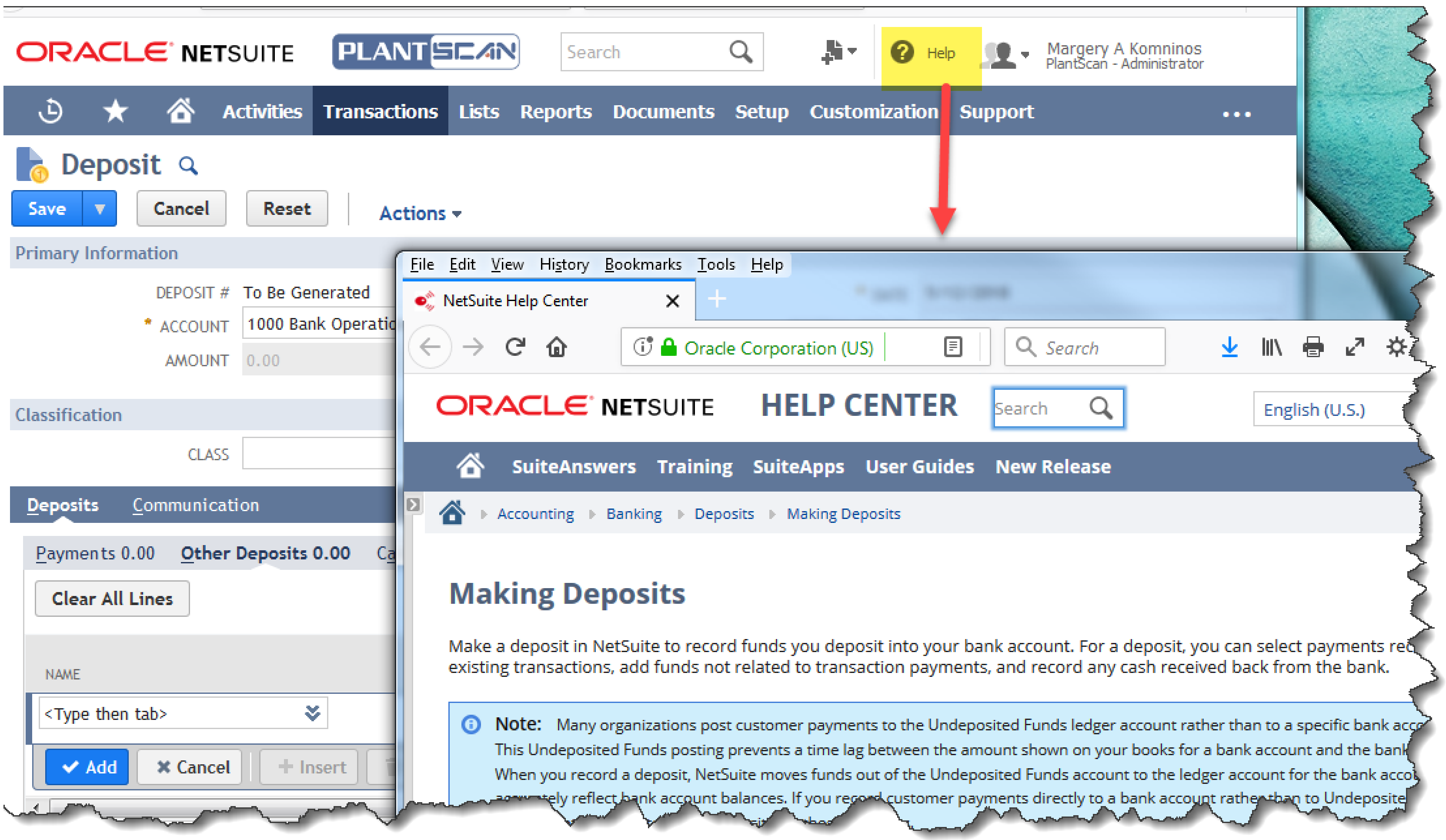
Employee Center	5	0
File Cabinet Size (MB)	10,000	1,175.82
Full Access User	8	5
HR Employee		6
Integration Units	100,000	1
Offline Client User	0	0
Payroll		0
QuickBooks Upload	1	1
Retail User	0	0
Sandbox Refreshes Count	0	0
Secure Customer Domain	3	0
Site Builder Site Count	1	1
Subsidiary Count	1	1
Subsidiary Country Limit		0
Suite Cloud Plus License	0	0
SuiteCommerce Advanced Site Count	0	0
TBA Access Tokens User	0	0
Total Storage Size (MB)	10,000	590
Two-Factor Authentication User	0	0
Unified Governance Tier of Service		0

Setup > Company > View Billing Information > Billable Components tab

DEMO 1

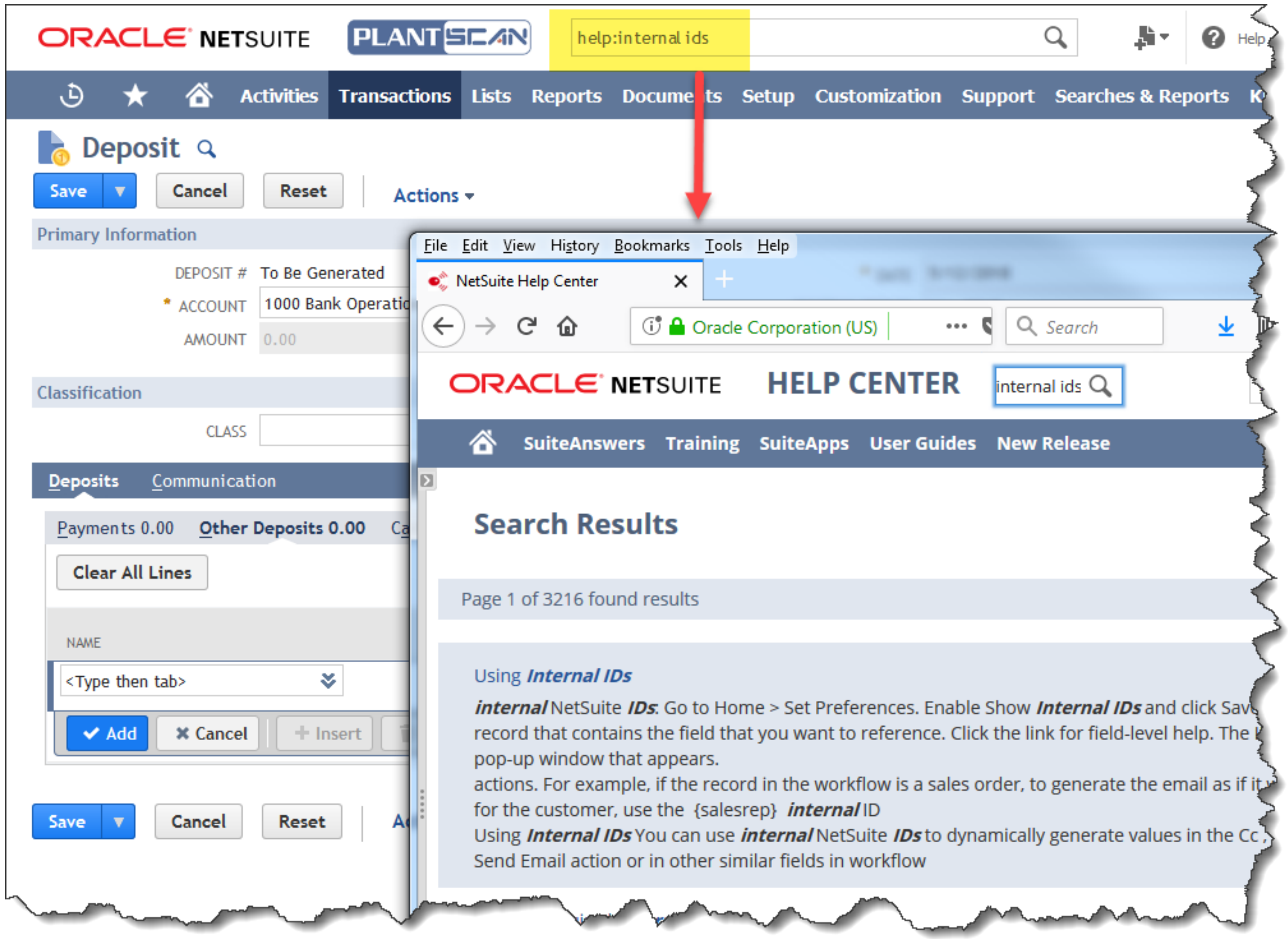
NetSuite Help Center

It's Contextual – by default provides help related to the page



NetSuite Help Center

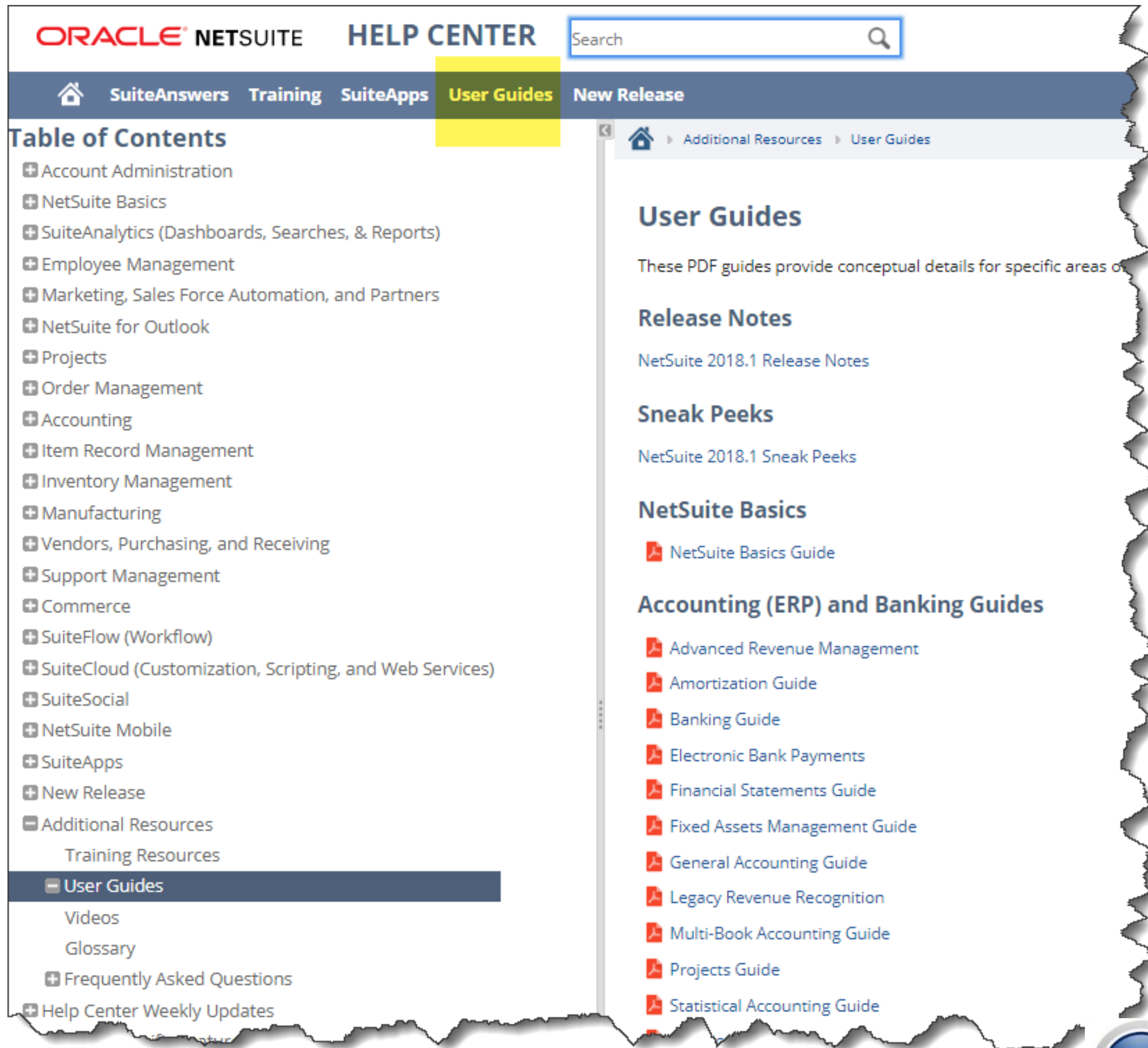
Type **help:*topic*** to go a different page



NetSuite User Guides

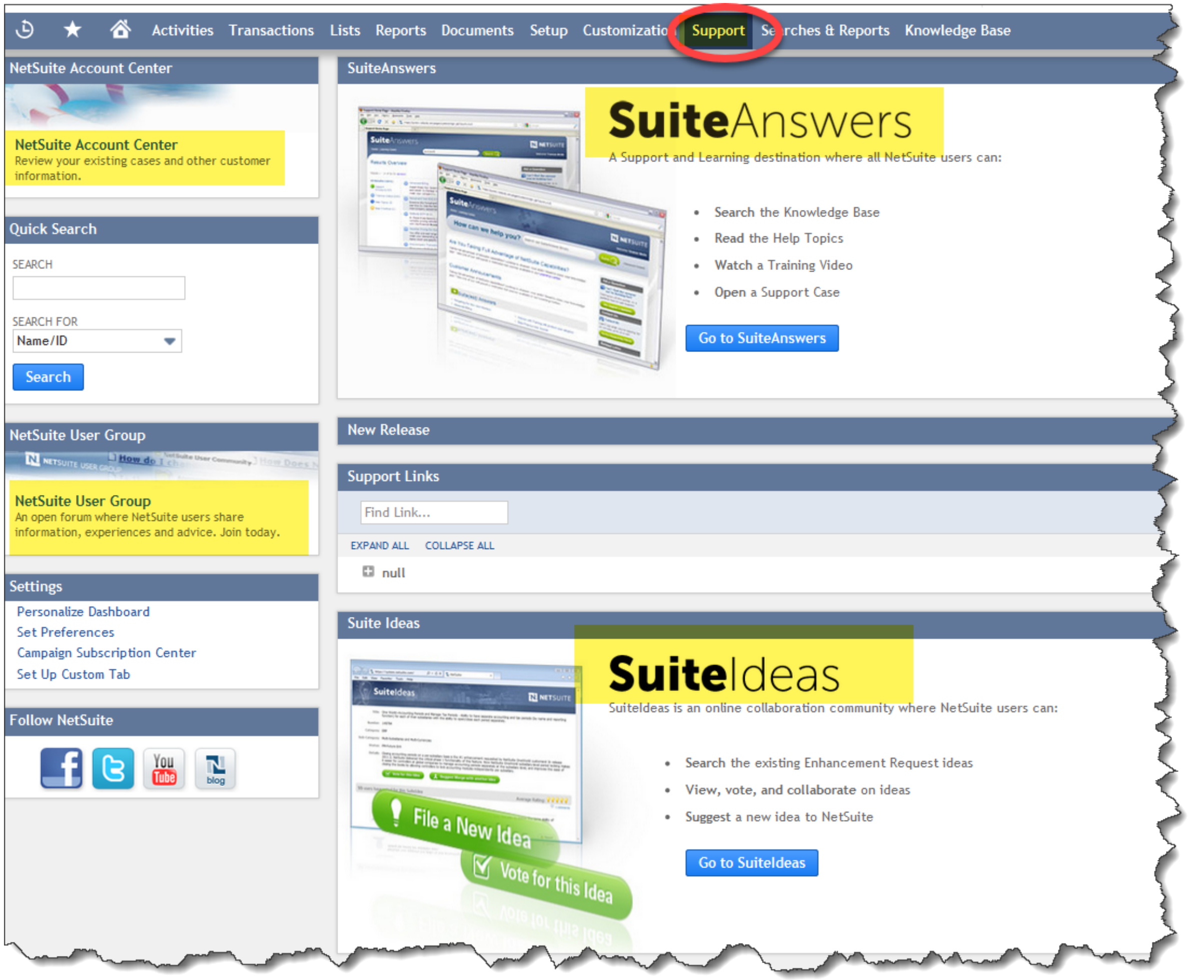
Great place to start if you are new to NetSuite or researching a new area.

100+ user guides



More NetSuite Help – All in 1 Place
Support Tab

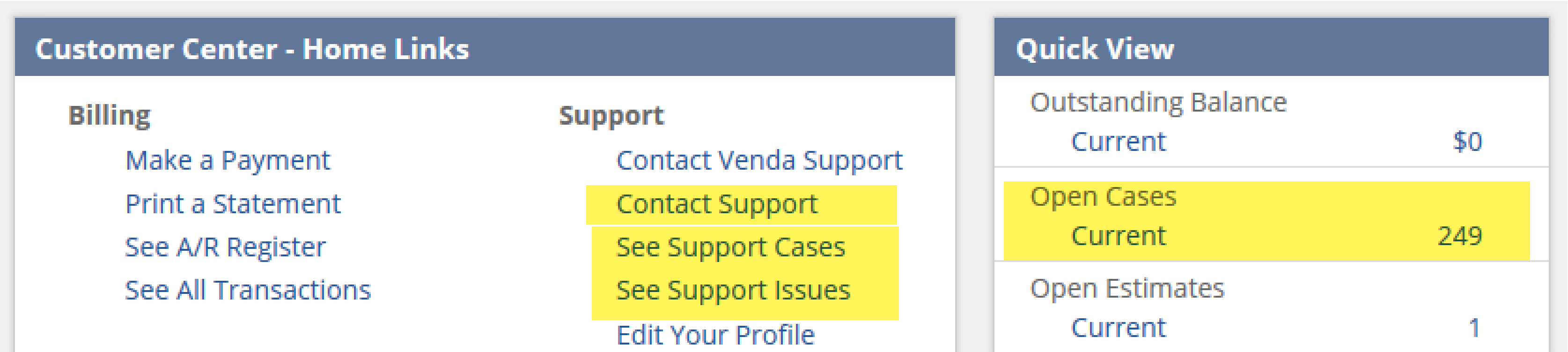
- NetSuite Account Center
  - Open a case
  - Review/update cases
- SuiteAnswers
  - Search for answers
  - Open a case
- OnlineNetSuite User Group
  - Search for answers
  - Post a question
  - Respond to a question
  - NS subject matter experts
- SuiteIdeas
  - Search enhancements
  - Vote for enhancement
  - Suggest new enhancement



NetSuite Account Center

NetSuite Account Center - view support cases and issues, and enter a case.

- Need Role
  - NetSuite Support Center or
  - NetSuite Support Center (Basic) – financials are not exposed
    - See



SuiteAnswers

- Support Articles
- Training Videos
- Help Topics
- SuiteWorld presentations
- Open a Support Case

SuiteAnswers
Example

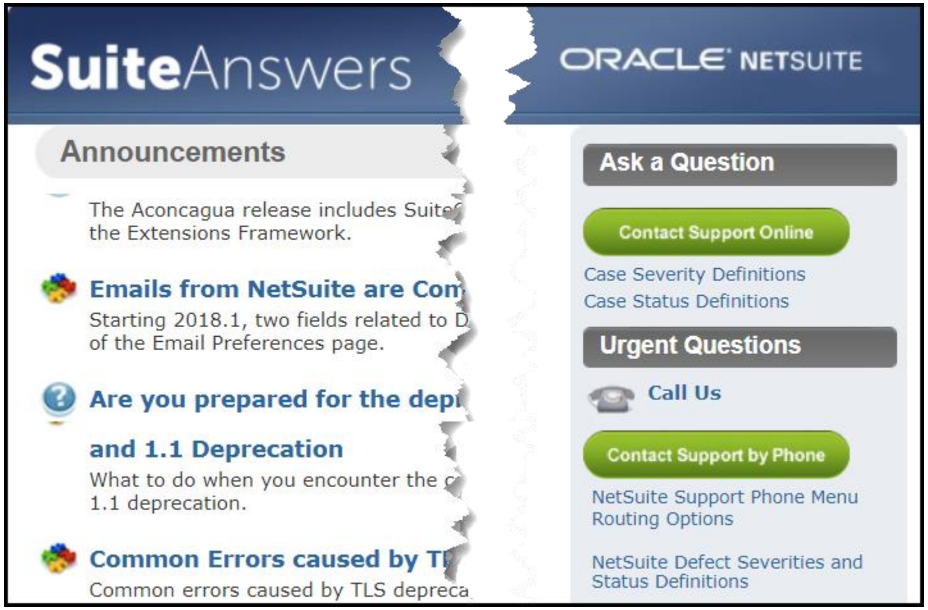
SuiteAnswers
Training Videos

Many Topics

SuiteAnswers
Open a Support Case

Support Online – submit a question or issue

- Click the Support tab, and click Go to SuiteAnswers.
- On the right side of the page, click Ask Support a Question.



Phone Support – submit a question or issue

- NS support menu (tip – make a shortcut)
  - https://system.netsuite.com/core/media/media.nl?id=13727838&c=NLCORP&h=b87c11d4aef551e18d74&_xt=.html
- Find Account number:
  - SuiteAnswers – click on contact support by phone and it shows at the top.
  - Any page – right click 'view source' and scroll down to bottom of page
  - Admins - Setup > Company > Company Information

DEMO

NetSuite Status Page

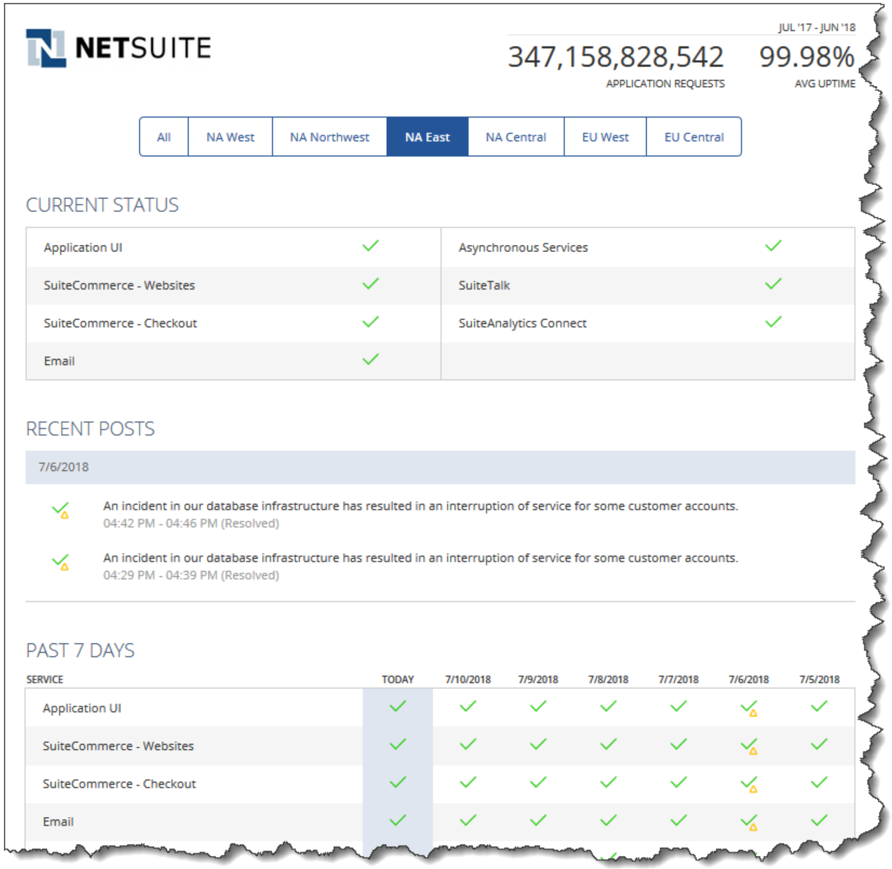
https://status.netsuite.com

To find you location: look for 3 digits in URL after “system”

e.g. https://system.**na1**.netsuite.com

See SuiteAnswers 65712:

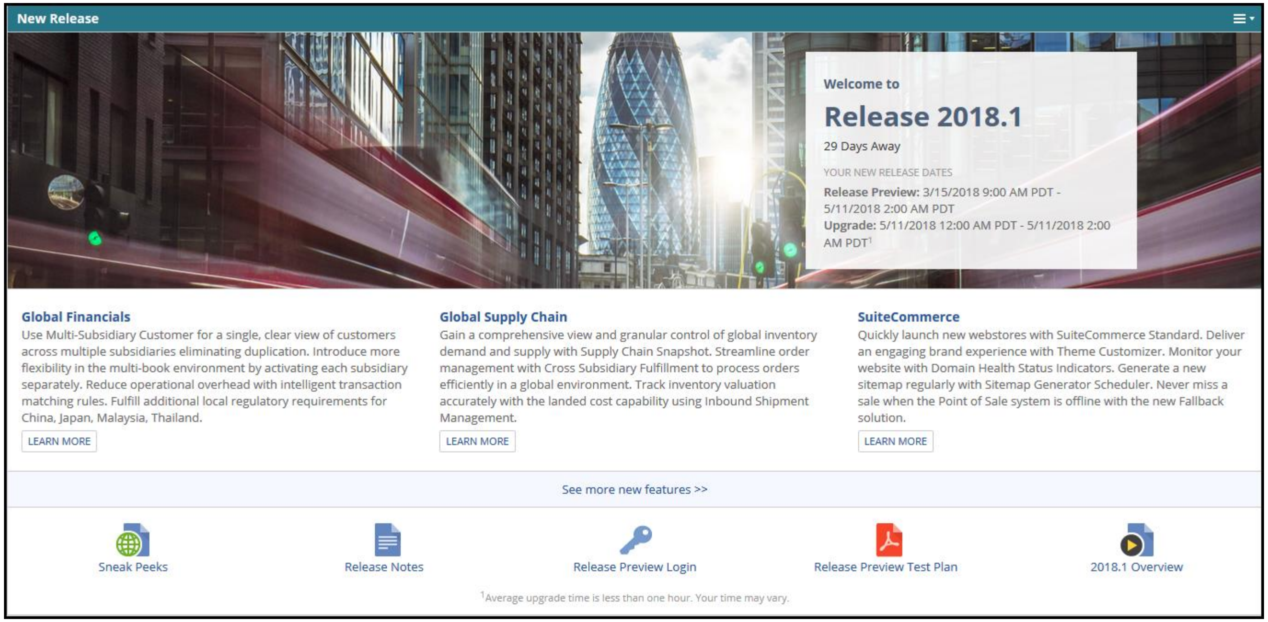
- Na1 = East (Boston)
- Na2 = NorthWest (Seattle)
- Na3 = Central
- Nothing (RP/sandbox) = West



New Release Portlet

Two releases each year: Q1 and Q3

Displays your scheduled upgrade

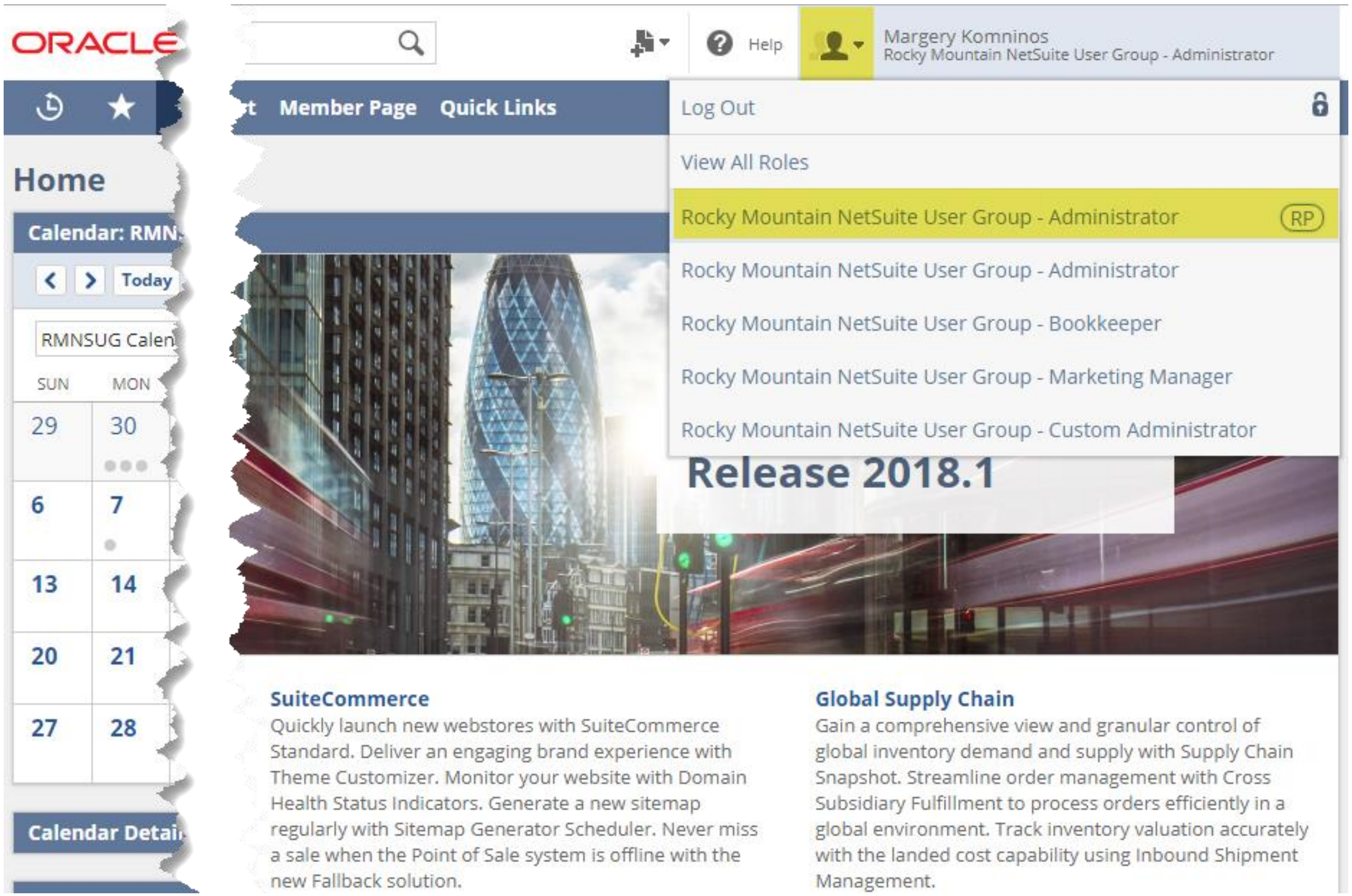


Portlet includes:

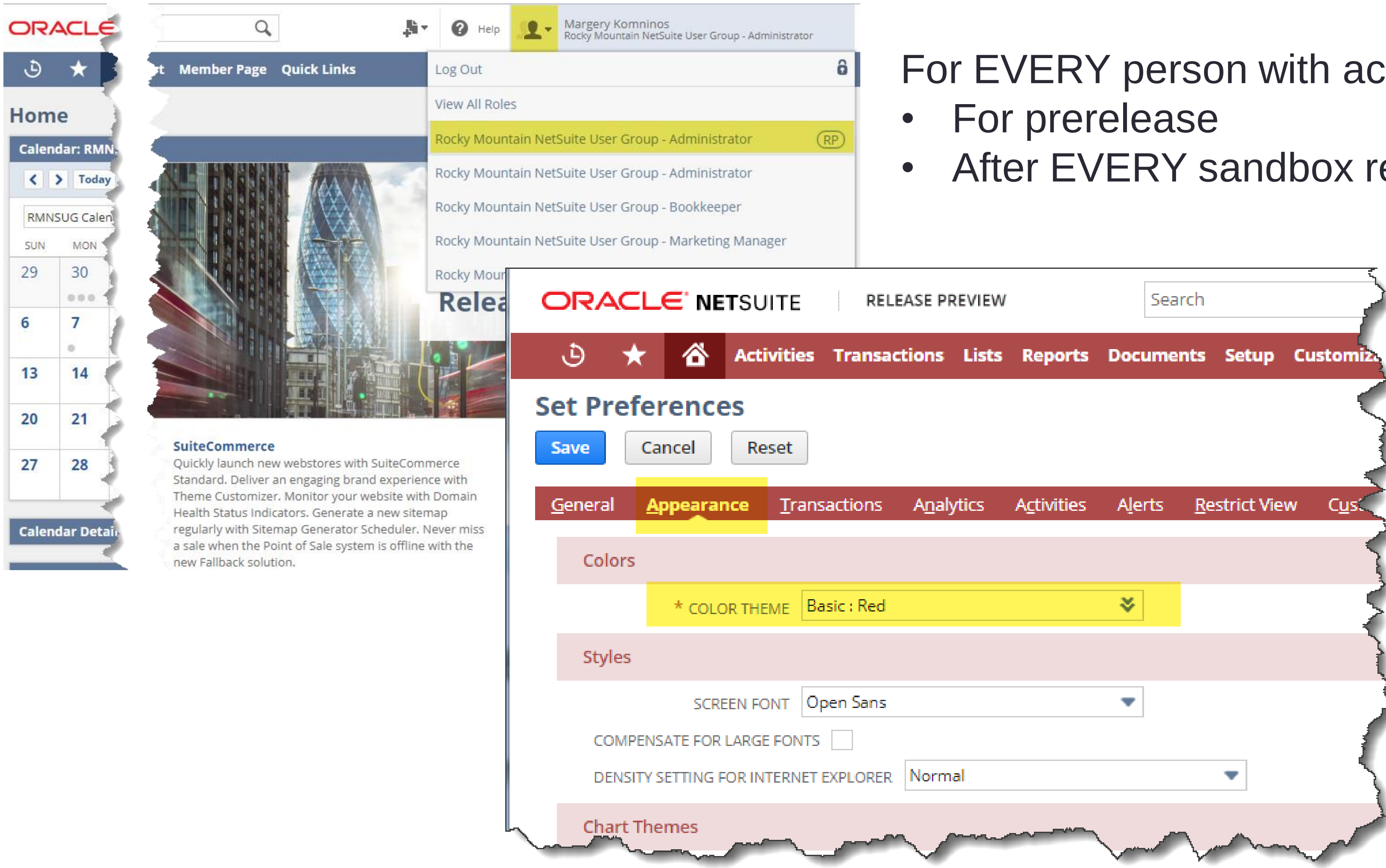
- Sneak Peeks
- release notes
- Release preview login
- Release preview Test plan
- Overview video

New Feature training in Suite Answers which are all extremely important tools for your release preparation.

Logging into Beta Site



Tip – Change Color of Beta Site

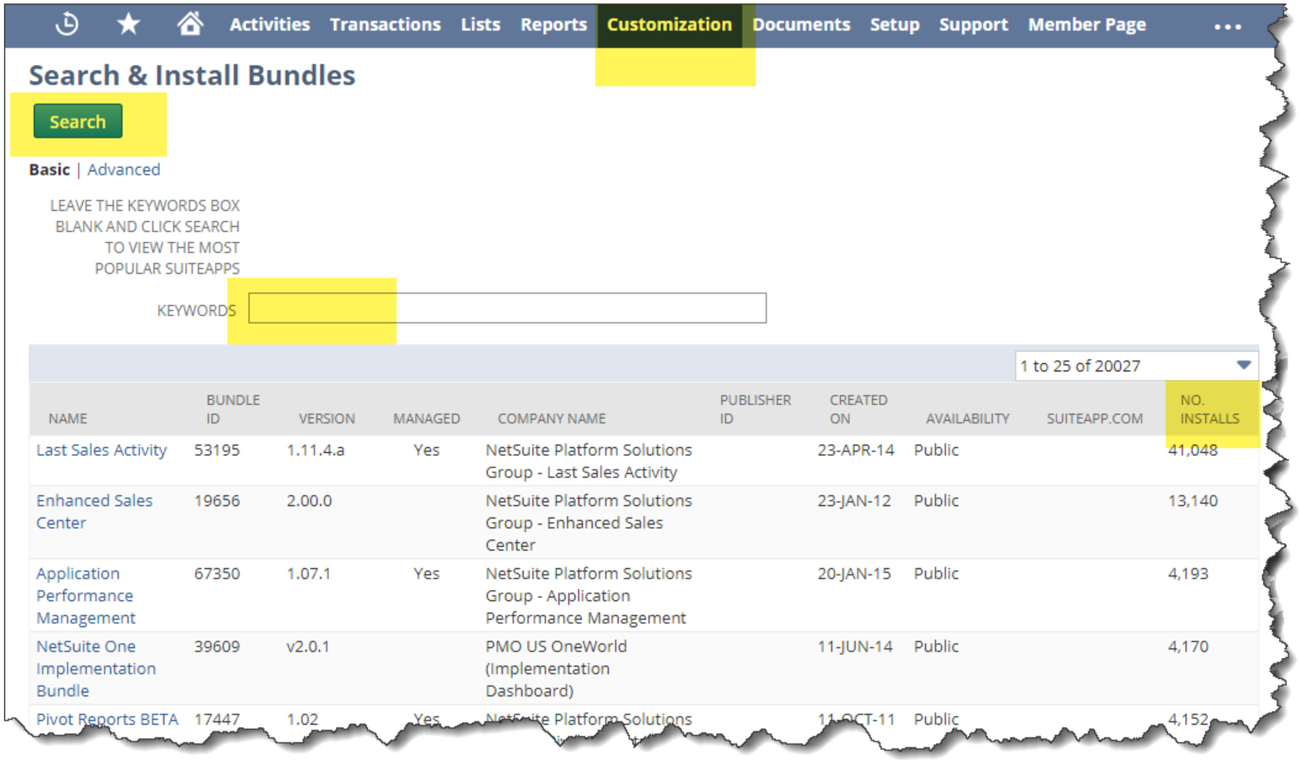


For EVERY person with access:

- For prerelease
- After EVERY sandbox refresh

SuiteBundler

- **Bundles/SuiteApps**
  - NetSuite users package groups of objects for distribution to other accounts.
- **Managed Bundles**
  - automated updates. You do not have to take any action to ensure it is the most up-to-date version.
- **Free Bundles**
  - Look for those downloaded the most
    - Keywords = blank
  - Look for those managed by NetSuite
  - Search by ‘workflows’ for free SuiteFlows



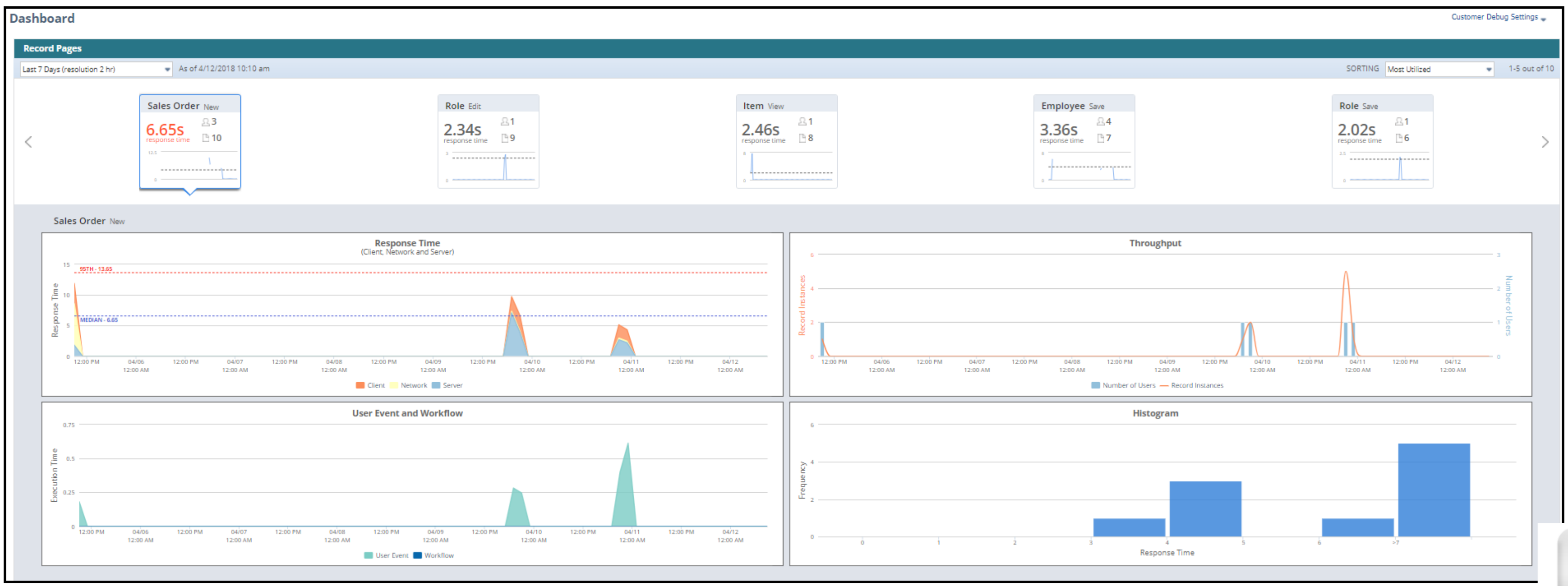
SuiteBundler – Free Bundles to Consider

- Administrator Role – Customizable
  - Includes a custom role that has all permissions and can be published to other administrators. Caution – merging records might not work ☹
- File Drag and Drop
  - Enables you to upload single or multiple files from your desktop to the file cabinet or to a records page. It can also be used to attach multiple files directly to editable sublists of supported records and custom records. Caution – does not work with inventory records ☹
- Navigation Portlet
  - Navigation Portlet enables you to simplify your navigation to commonly used menus in NetSuite. You can group the shortcuts or links that you commonly use for each navigation category. The links are displayed in the Custom Portlet and can be configured using custom record. You can add multiple navigation portlets in your dashboard.
- StickyNotes
  - Lets you attach notes to record pages and keep track of your notes as well as others' replies. With StickyNotes, you can highlight important information or critical action items on a record by defining custom color notes.
- NetSuite Records Timeline Beta
  - A visual representation of your records in NetSuite. You can use NetSuite Records Timeline, for example, to track your sales transaction workflow. You can customize your timeline to include the records you often use and organize them in groups that make sense for your business.
- Last Sales Activity
  - Adds a **Last Sales Activity** field on lead, prospect, customer, contact, and opportunity records. The field displays the date a sales activity was last performed for that record.
- Application Performance Management
  - If you are having a performance issue and need to see where it is coming from you can view this tool to manage the performance of your customizations.

Application Performance Management

The Benefits are the following:

- Helps Identify performance issues with scripts and workflows
- View performance metrics and determine system health and trends
- Drill down for greater levels of detail about specific record types, operations, and instances.
- View response times by client, server, and network
- Monitor performance of saved searches, user event scripts, workflows, RESTlets, scheduled scripts, and Suitelets
- Bundle 67350 and search SuiteAnswers 44059



Example: users complain about slow performance when entering SOs which has scripts and workflows. Pull up dashboard and see portal for SO, view metrics and drill down. Can see number of users and SOs entered within a timeframe. Can review metrics and graphs for response time, user events, workflows, thruput, …

Info

DEMO

Terminology

- Vendor – Company/individual that provides goods or services to you.
- Customer – Company/individual to whom you provide goods or services (Customer, Lead, Prospect).
  - Set Preferences > Analytics (search section) – ‘CU’ prefix includes leads and prospects
- Entity - many types of “list” records (e.g. customer, contact, employee, lead, prospect, project, partner, vendor, entity group).
- Invoice – Bill you send TO a customer.
- Bill - Invoice sent to you by a vendor OR a specific purchase that your company makes without an invoice associated with it.
- Item Receipt – Tracks receipt of items (from a purchase order). May be kept in inventory or not.
- Items - Physical items (inventory and non-inventory, assembly and non-assembly, kits), Services, Description, Discount …
- List View – a list of records that you see when you select a record type (will show in later demo)
- Sublist View – a list of records that you see when a list appears on a record’s subtab (note: will show in later demo)

Info

High Level Process Overviews

$$$ IN

- Lead to Cash with and without Inventory

$$$ Out

- Purchase to Pay Process Overview with and without Inventory

Lead to Cash Process Overview ($ IN)

Note: Lead to Prospect to Customer can be automatic or manual. Can skip steps.

Entities	Transactions
Lead	None
⇩	⇩
Prospect	Opportunity/Estimate
⇩	⇩
Customer	Sales Order (invty commitment)
	⇩
	Fulfillment (decrement invty)
	⇩
	Invoice
	⇩
	Payment
	⇩
	Deposit

Note: Can enter process at different transaction steps.

Text in red = related to inventory transactions

Text in blue = if cash sale will not exist as payment will happen at time of SO

Customer Invoice ($ IN)
Invoice from Scratch

<u>Entities</u>	<u>Transactions</u>
Customer	Invoice (decrement invty)
	⇩
	Payment
	⇩
	Deposit

Text in red = related to inventory transactions

Purchase to Pay Process Overview ($ OUT)

Entity	Transactions
Vendor	Purchase Request
	⇩
	Purchase Order
	⇩
	Item Receipt (increment invty)
	⇩
	Vendor Bill
	⇩
	Payment

Note: if non-inventory item and preference on item record ‘Can be Fulfilled/Received’ is checked then item receipt still occurs but inventory is not affected. Caution: once a transaction has used that item it cannot be changed.

Text in red = related to inventory transactions

Purchase to Pay Process Overview ($ OUT)
No Purchase Order – Directly From Vendor Bill

Entity	Transactions
Vendor	Vendor Bill
	(increment invty)
	⇩
	Payment

Text in red = related to inventory transactions

Records in NetSuite

- Transaction Records – a record of a business event
  - Usually impacts GL (but not always)
  - Examples: SO, PO, invoice, vendor bill, inventory adjustment, assembly build, work order
- List Records – any record that is not a business event
  - Does not impact the GL
  - Examples - employees, leads, prospects, customers, contacts, groups, vendors, accounts, items

Working with Record Lists (different than Lists Records)

- For both Transactions and Lists Records
- Access individual records or work with multiple records at one time.
  - Get there from Transactions or Lists tab and drilling down
  - Default is the default view – can select other views or customize this one
  - Expand the Filter area to show and use the filters provided
  - Use the controls in the row at the top of the list to do the following:
    - export the list (CSV, Microsoft Excel, or PDF file), print, sort, edit (limited to certain fields), show inactive records
  - Click a column heading to sort the list by that column
    - Sort selection determines page groupings
  - Click edit or view from list
  - Can see an audit trail of all records of this kind

DEMO

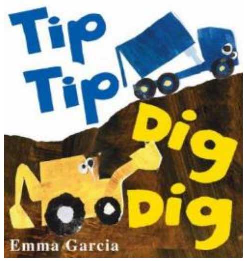
So Many Email Templates

- System Email Templates
  - Used in system-automated email for cases and user notifications (e.g. all case messages to customers and employees, customer center/partner center access, user access)
  - Setup > Company > System Email Templates
- Transaction/Record Email Templates
  - Used to create personalized email messages to send to your business contacts
  - Documents > Templates > Email Templates
- Automated Transaction Templates for Sales Orders
  - Not possible to modify – enhancement request 252644
  - See SuiteAnswers 29180 to create workflow to send custom email template
- Marketing Templates
  - Used to generate campaign emails
  - Lists > Marketing > Marketing Templates OR Documents > Templates > Marketing Templates
- Fulfillment Template
  - If NOT using SiteBuilder go to Setup > Accounting > Preferences > Customize Fulfillment Email (HTML)
  - If using SiteBuilder go to Setup > Site Builder > Setup Tasks > Customize Fulfillment Email (HTML)
- Web Store Email Templates – 2 methods
  1. Setup > Site Builder > Setup Tasks > Customize Text (Email Subtab) (HTML)
  2. Documents > Templates > Web Store Templates
     - Used to customize email messages sent from your web store
     - Overrides the default from NetSuite in option 1

❖ Note: some of the above require admin permission or an employees with Setup Company permission

DEMO

Now Let’s Dig In

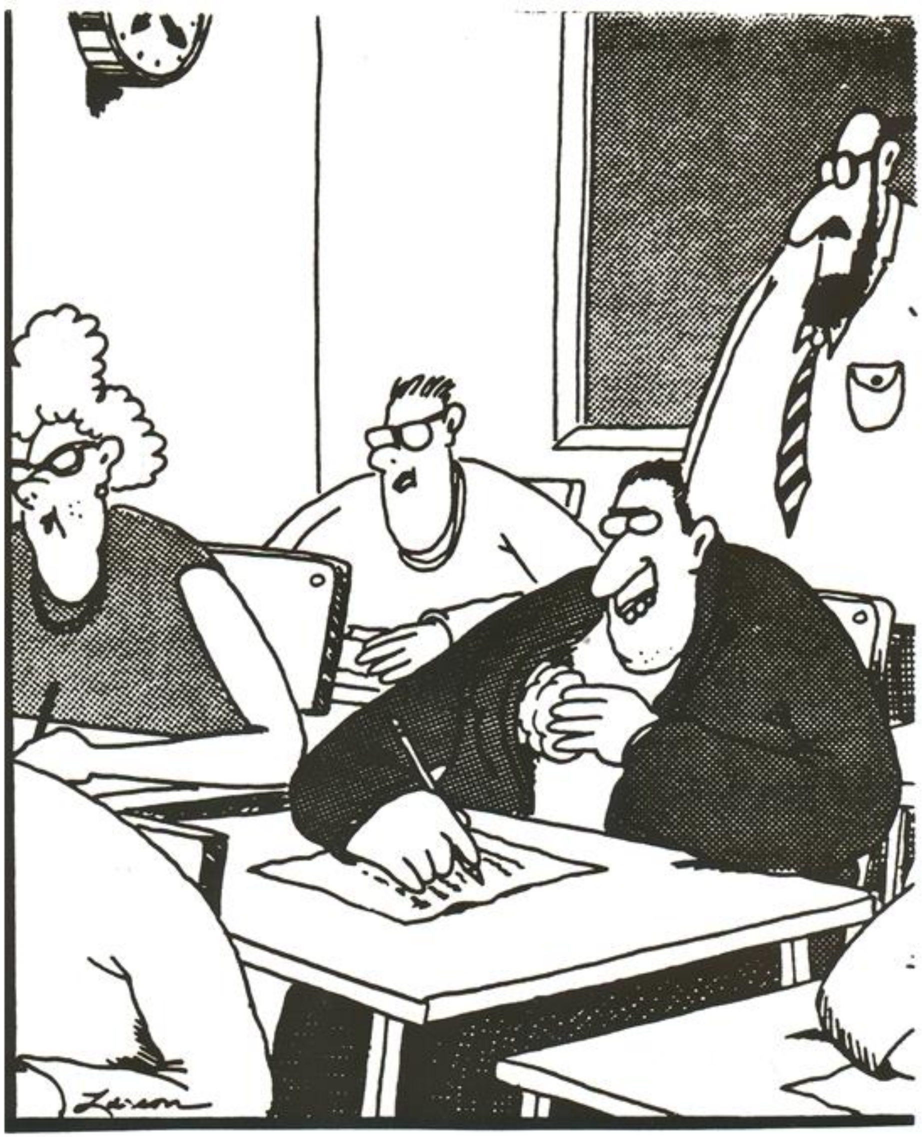


- Home Page
  - Personalize your home page
  - 5 ways to add shortcuts
  - Set personal preferences
- Global Search
- NetSuite Reporting – Which do I use ?
  - Report
  - Saved Searches
- Getting Data In/Out and Updated

But before we do…..

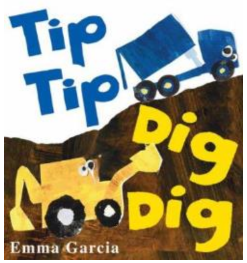
Break Time

20 minutes



MIDWAY THROUGH THE PRESENTATION
BILL PULLS OUT A BIGGER BRAIN.

Now Let's Dig In



- Home Page
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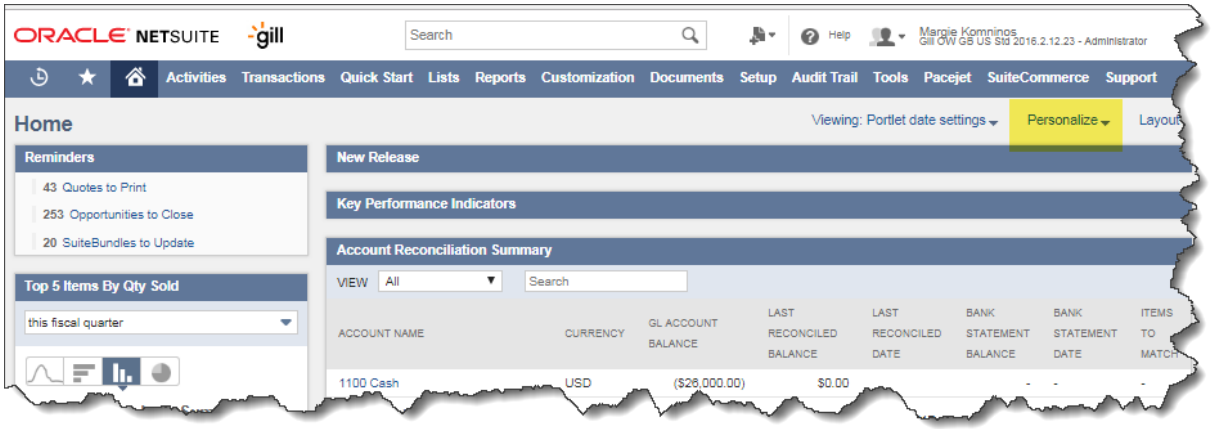
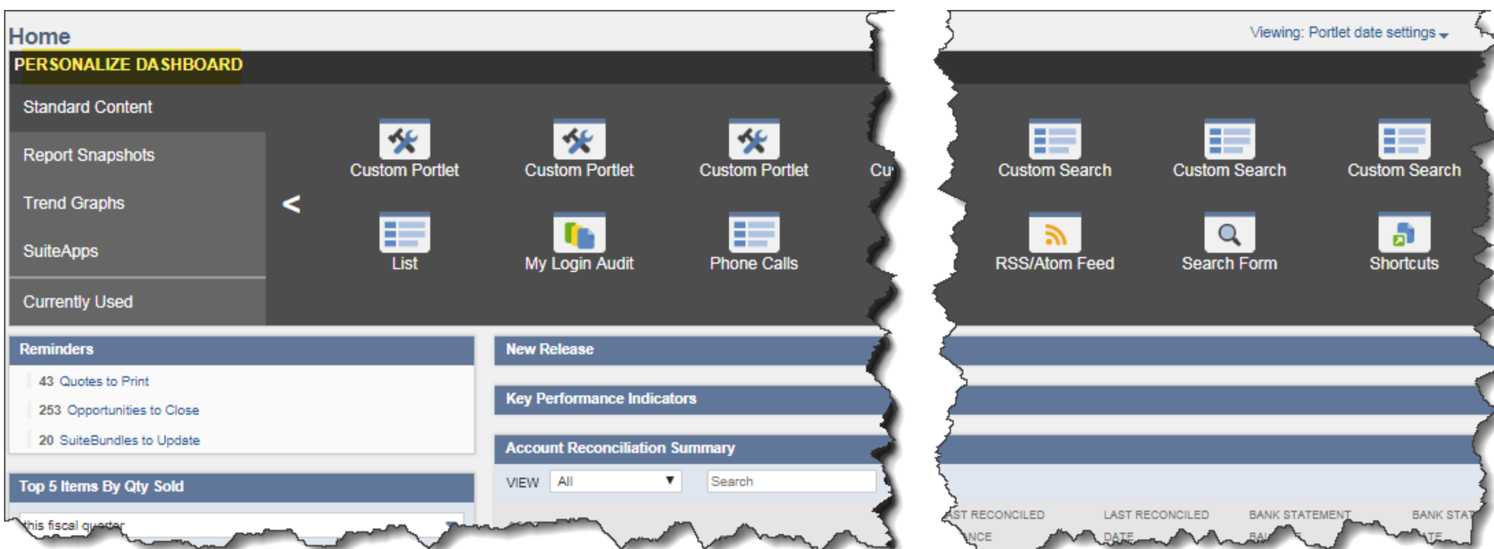
Home Page > Personalize
Setting up a dashboard

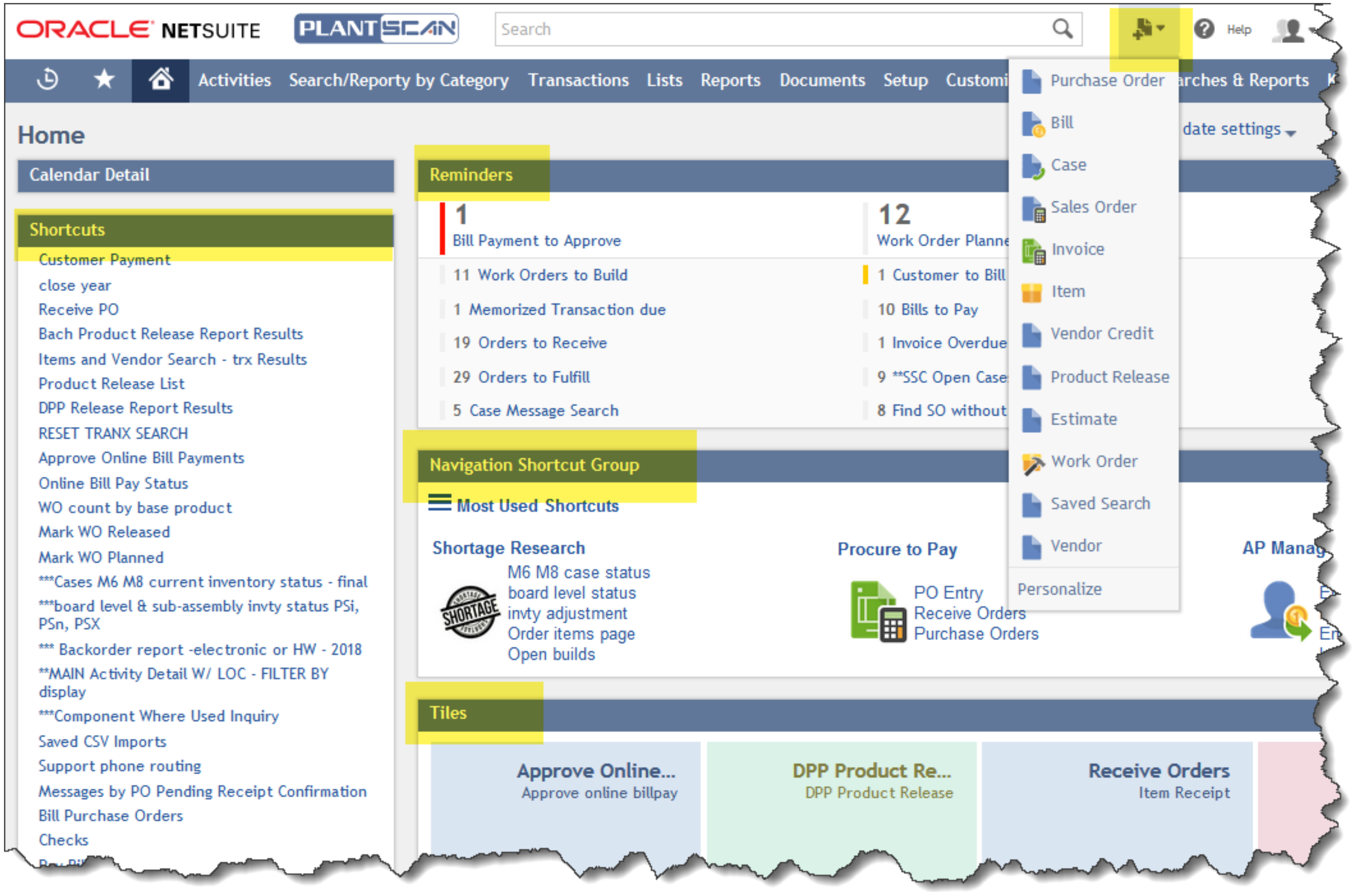




DEMO

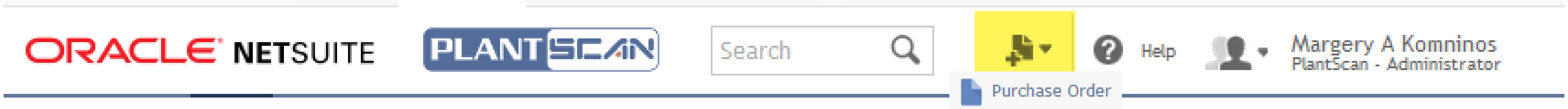
Home Page > 5 Types of Shortcuts

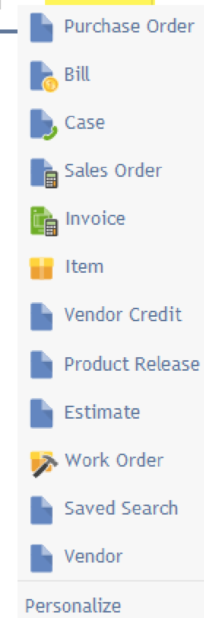
1. Menu Bar
2. Shortcuts portlet
3. Navigation Portlet
4. Reminders
5. Tiles Portlet



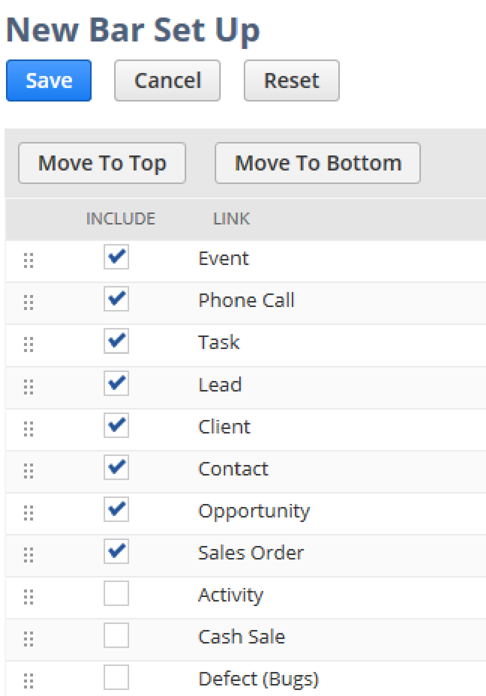
Home Page > 5 Types of Shortcuts

1 - Menu Bar -





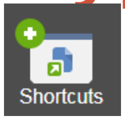
Accessed from any page



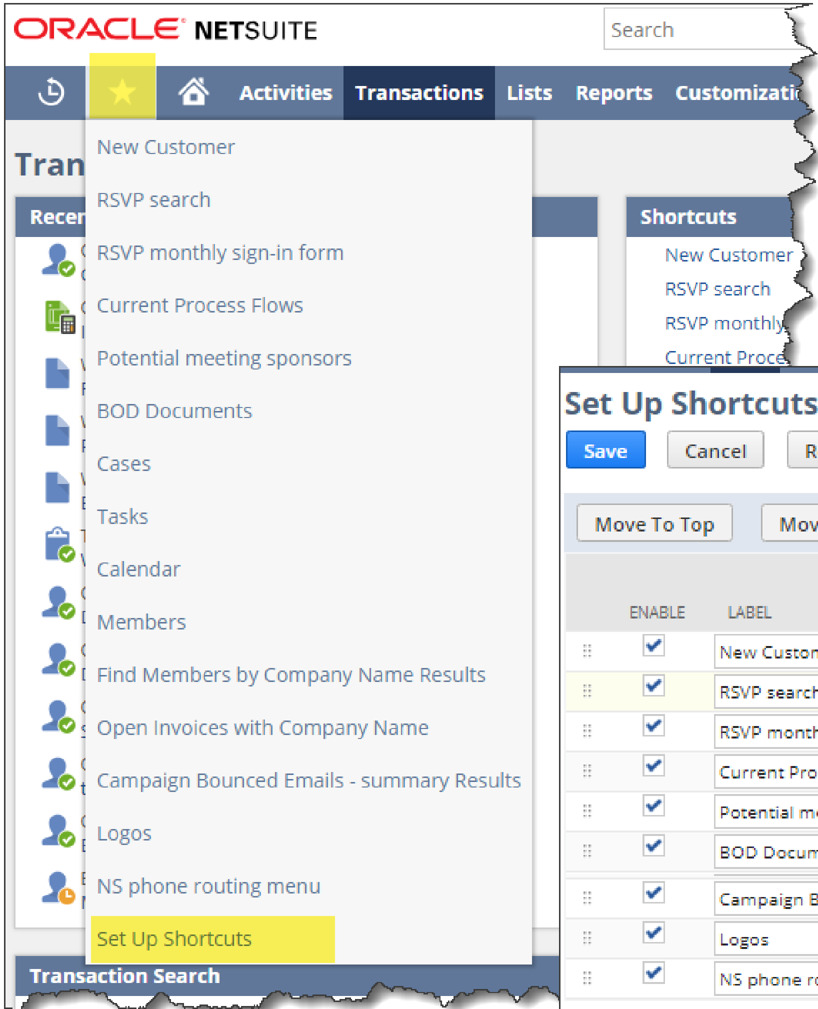
- Click on Personalize in the drop down to add links to new records/transactions
- Includes Custom Records
- Limited
- Exposed on every page

Home Page > 5 Types of Shortcuts

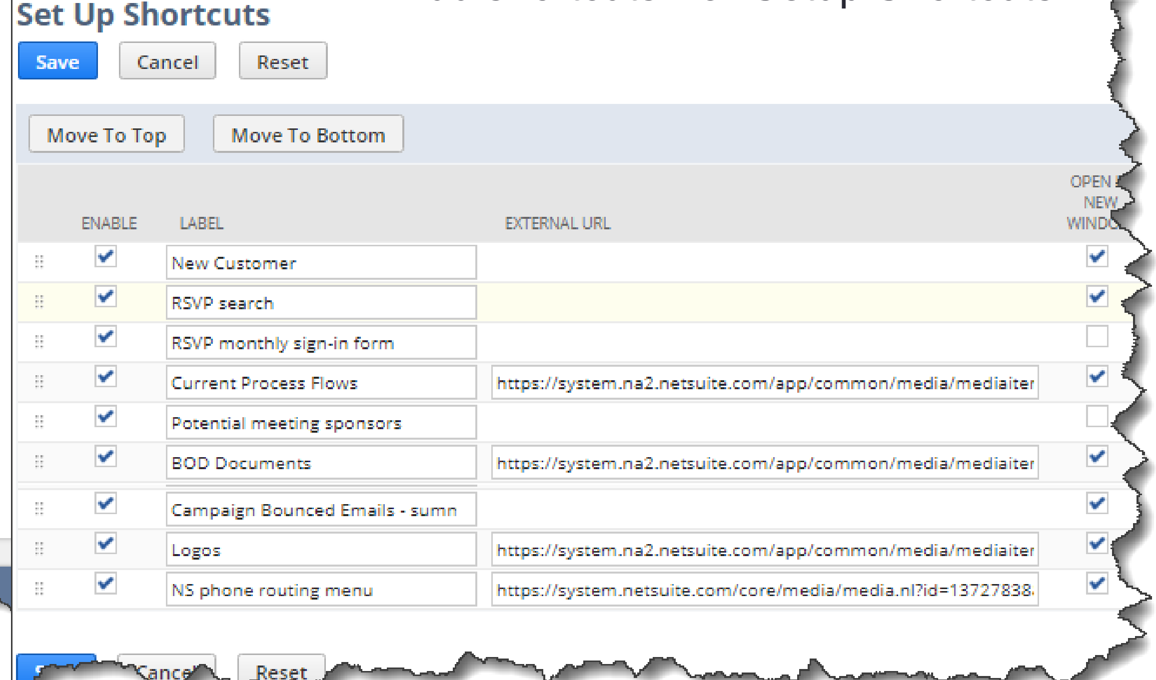
2 - Shortcuts Portlet



- Setup using Shortcut portlet
- Can be exposed on every page
- Can be moved (up/down)
- Does not support subgrouping

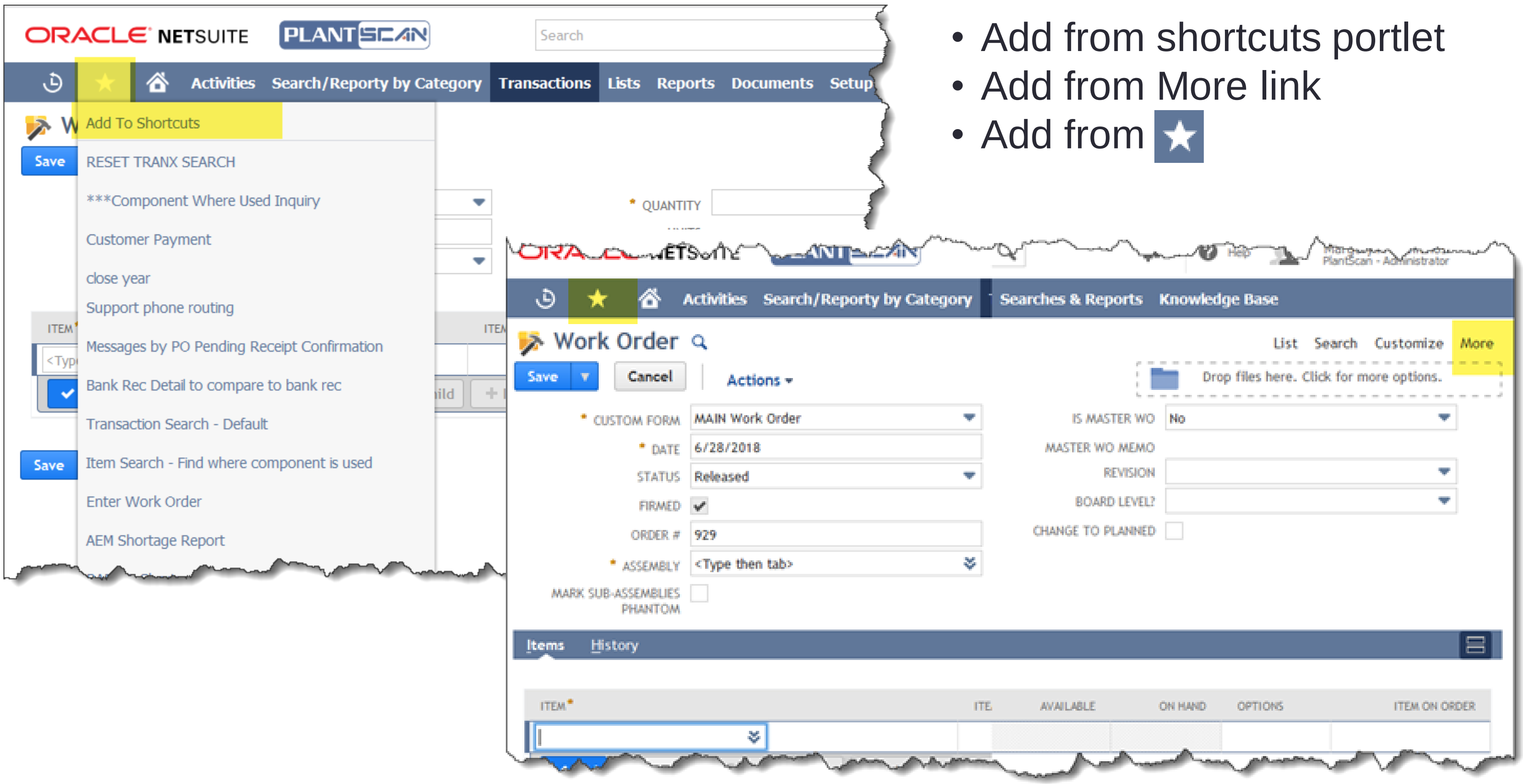


Add shortcuts via “Setup Shortcuts”



Home Page > 5 Types of Shortcuts

2- Shortcuts Portlet

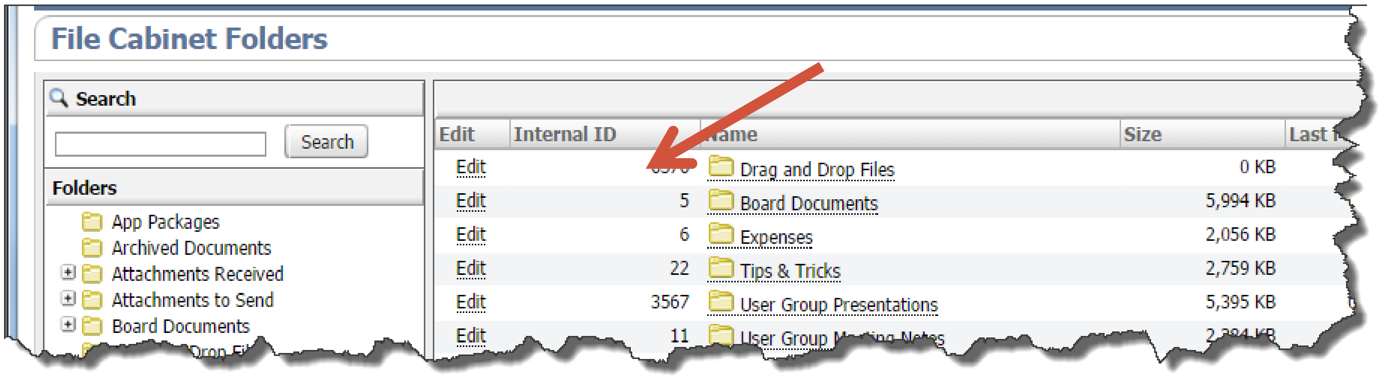


- Add from shortcuts portlet
- Add from More link
- Add from

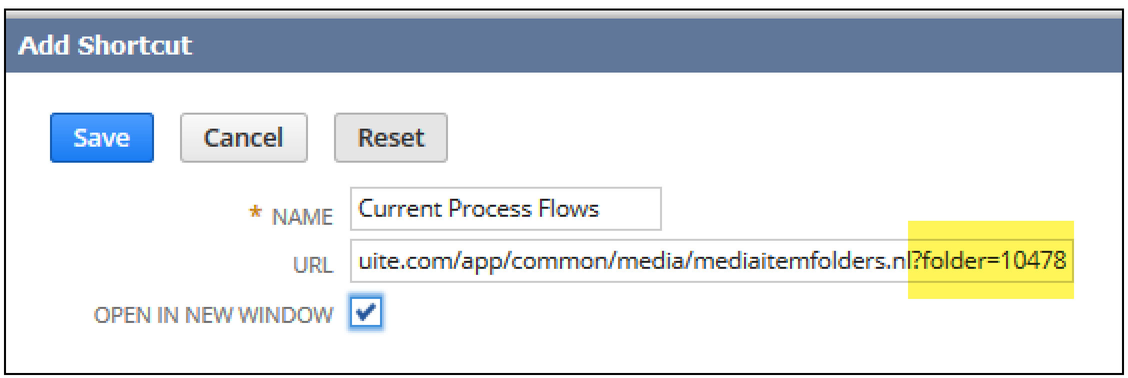
Shortcuts Portlet

Tip & Trick – create a shortcut to a folder in the file cabinet

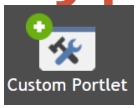
- Click the **Documents** tab.
- Find the internal ID for the folder.
  - If you have preferences set to show Internal ID, then it will automatically be displayed



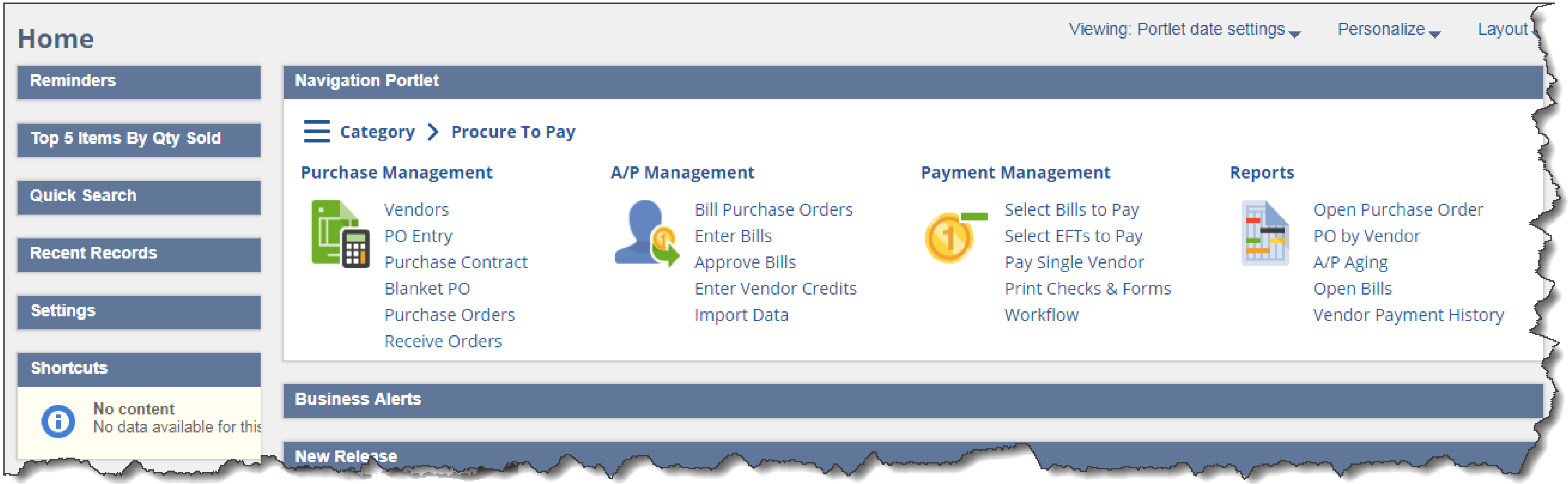
- In the Shortcuts portlet, click **New Shortcut**.
- Append folder's internal ID to the end of the URL below; https://system.netsuite.com/app/common/media/mediaitemfolders.nl?folder=
  Note: use your system location in lieu of system.netsuite.com
- Save



Home Page > 5 Types of Shortcuts

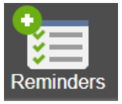
3 - Navigation Portlet 

- Simplifies navigation to commonly used menus in NetSuite by category.
- Free SuiteApp (bundle by NS) – Install bundle 186103; SuiteAnswers 65731
- Use Custom Portlet to display
- Great way to organize shortcuts
- Can only view on Home Page
- Images not included – zip file loaded on member page of www.rmnsug.org

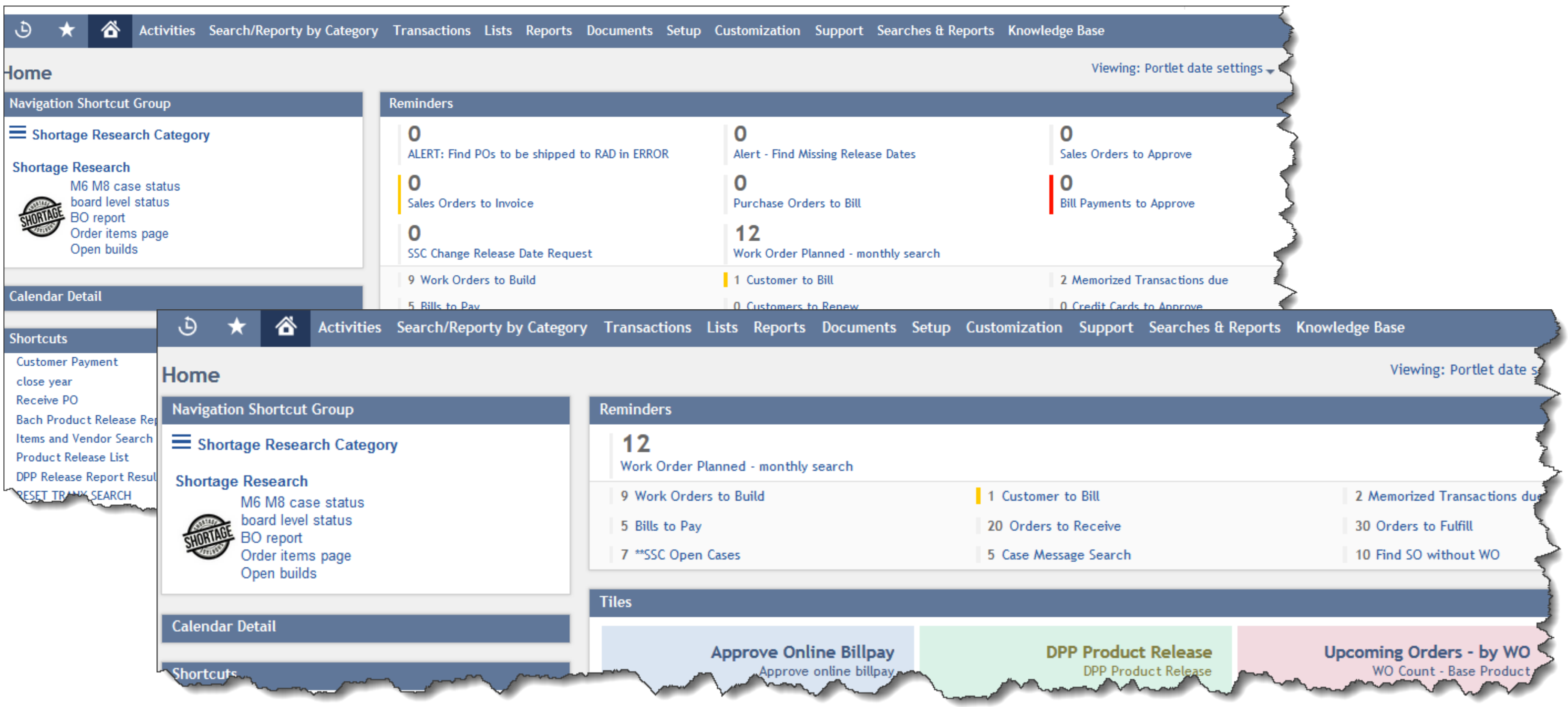


Home Page > 5 Type of Shortcuts

4 - Reminders Portlet (Your BFF)

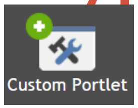


- Reminders and other key information (must be able to provide a count of records)
- Both NetSuite supplied and custom reminders
- Can setup on Transactions tab and Lists tab pages (setup uniquely on each page)
- Select to show reminder with zero results on not
- Can setup highlighting rules with different colors based on count result

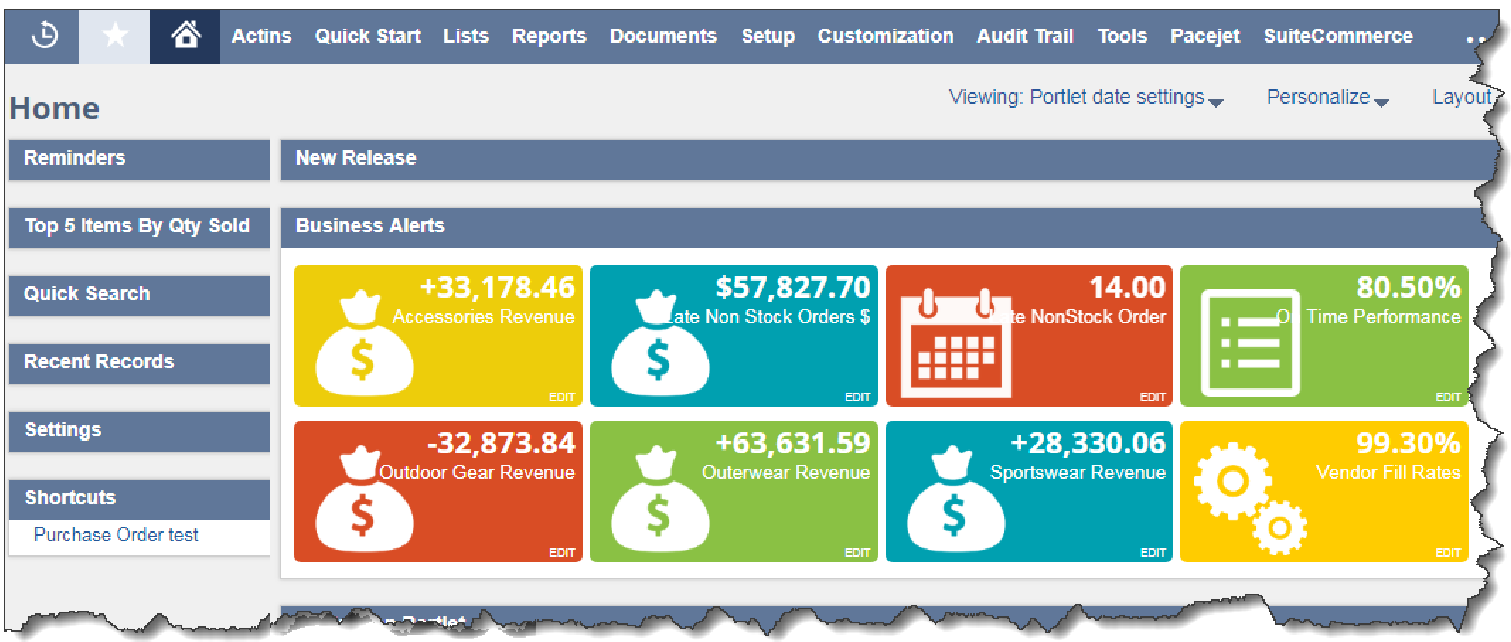


Home Page > 5 Types of Shortcuts

5 - Dashboard Tiles

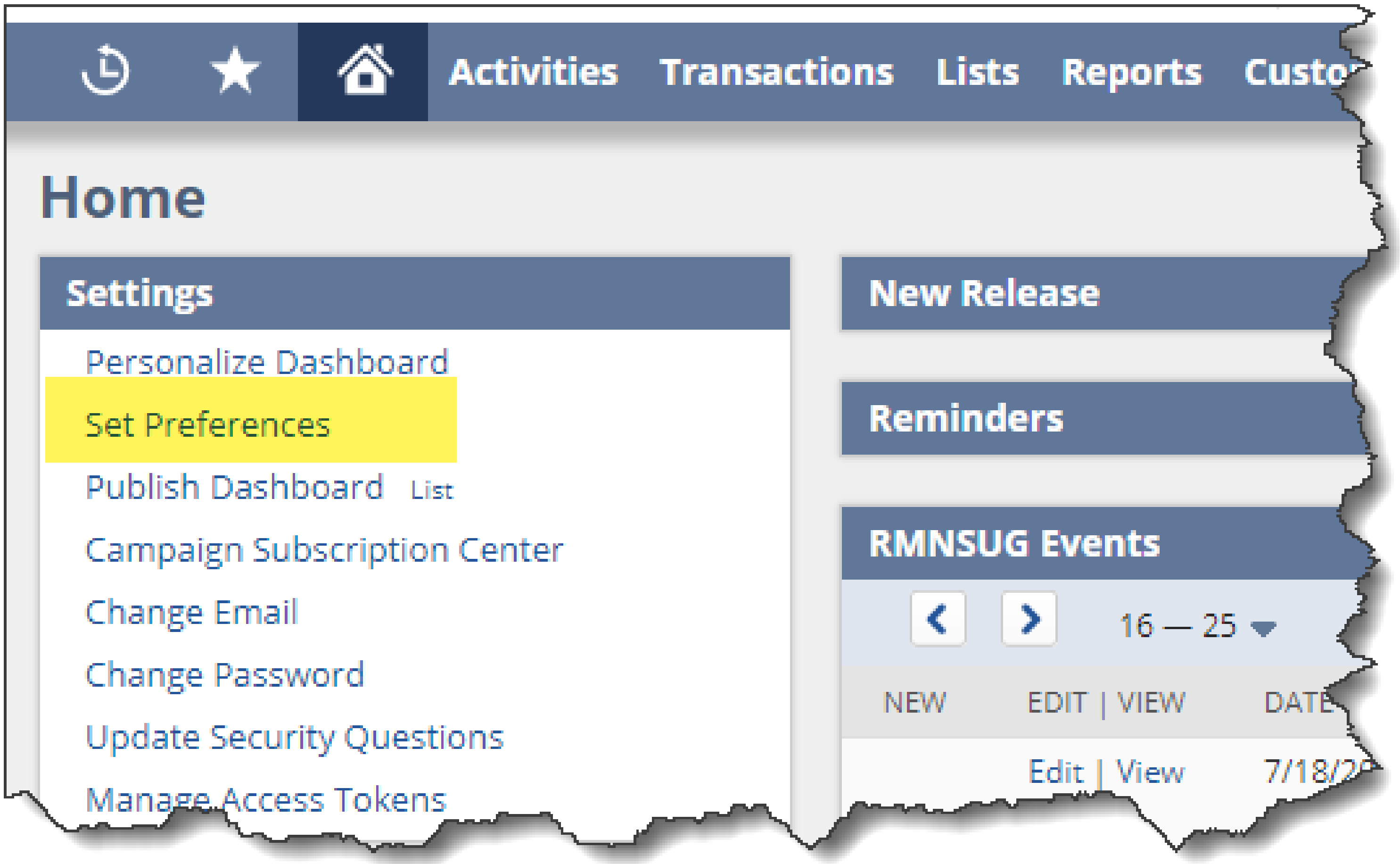


- Display business critical KPIs in a bold visual layout with images and blinking alerts.
- Free SuiteApp (bundle by NS) – Install bundle 185219, SuiteAnswers 65560
- Images not included
- Use Custom Portlet to display
- Can only view on Home Page



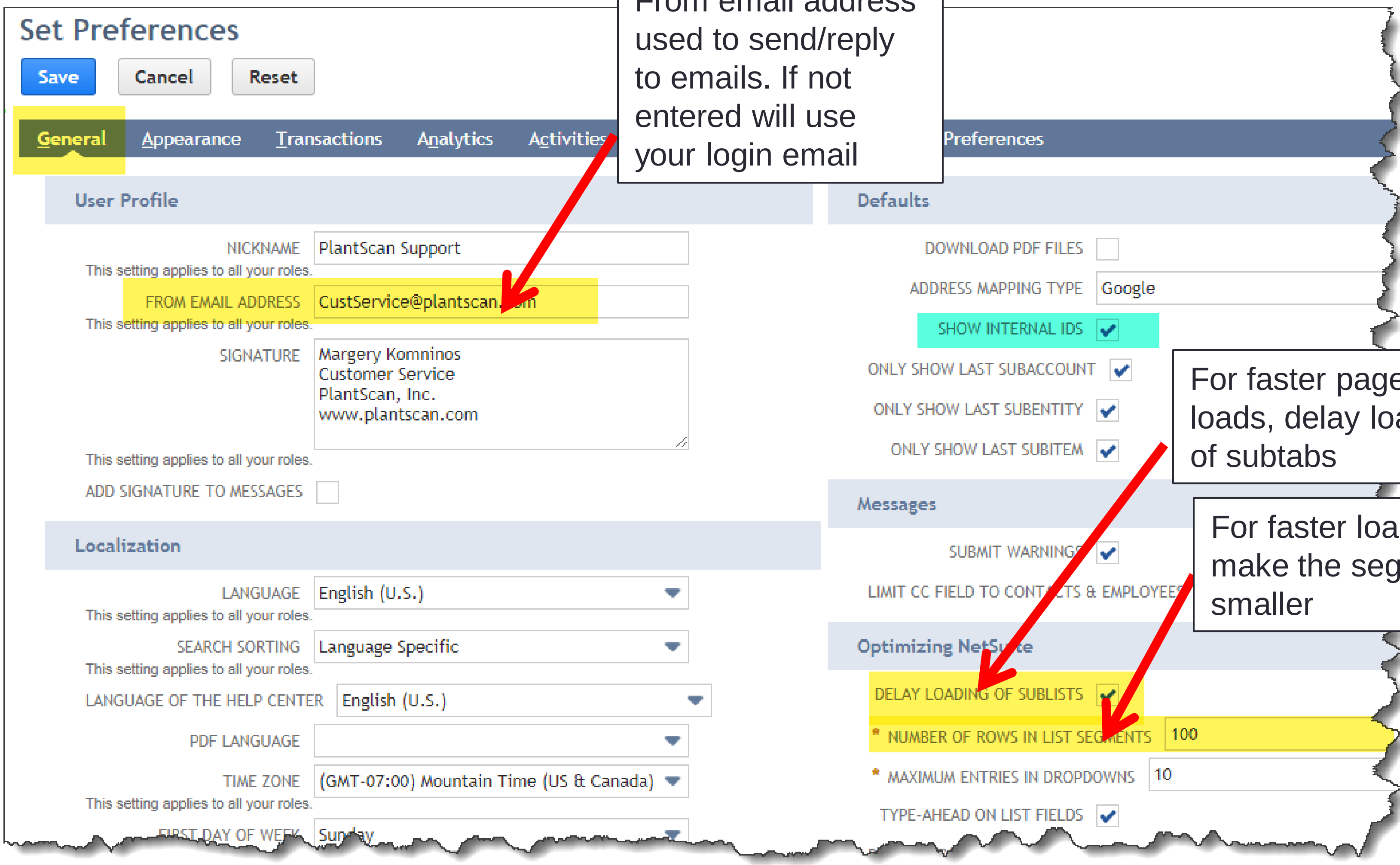
Home > Set Preferences

Allows you to define your own preferences that will impact only you when you sign in



Home > Set Preferences

General Tab



From email address used to send/reply to emails. If not entered will use your login email

For faster page loads, delay loading of subtabs

For faster loading make the segments smaller

Home > Set Preferences

General Tab > Show Internal ID

What's an External ID

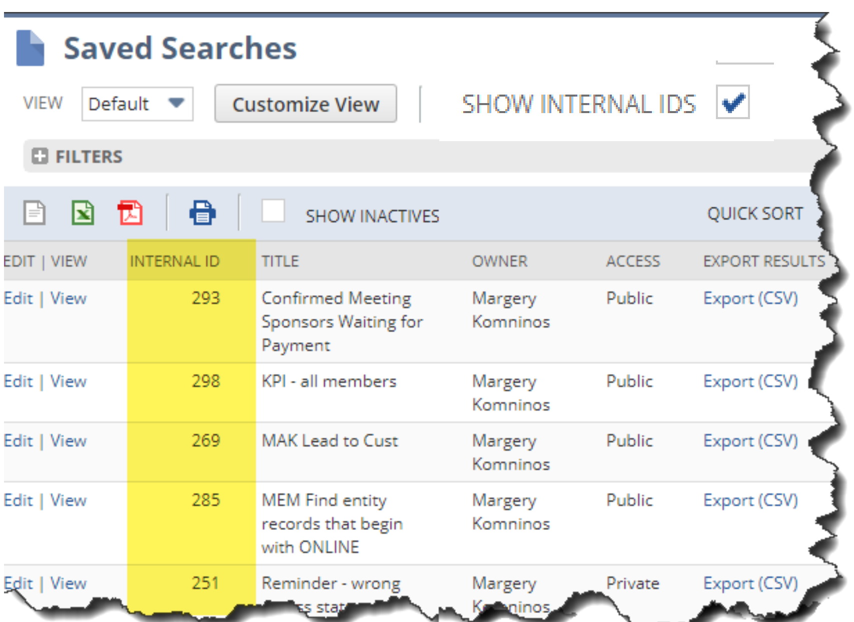
Show Internal ID = ☑

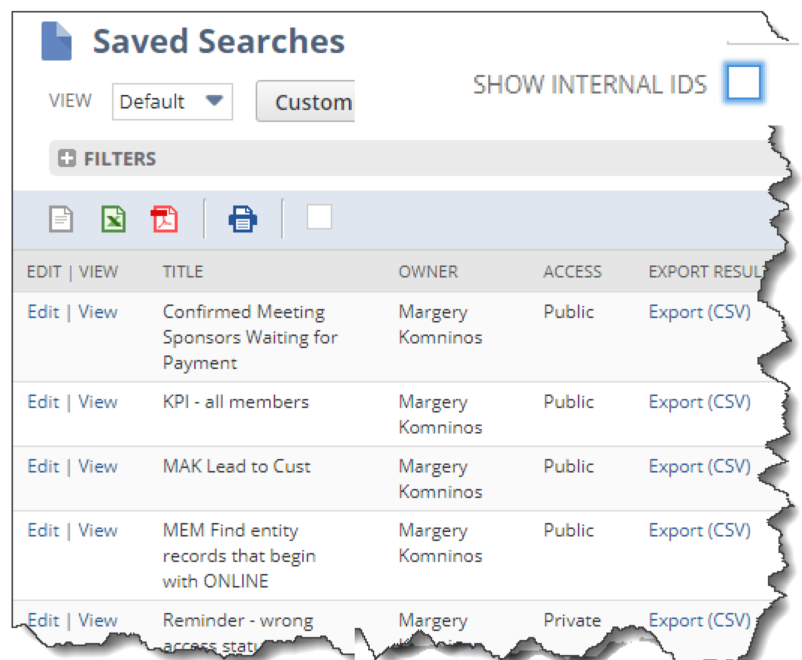
- Every record has one
- Always displays on lists and saved search results
- Internal name on field level help – good for creating saved search formulas, workflows, scripts
- Used in CSV imports

TIP: Alternative for Chrome – install plugin 'NetSuite: Show Field IDs'

- Hovering over field will display the internal name

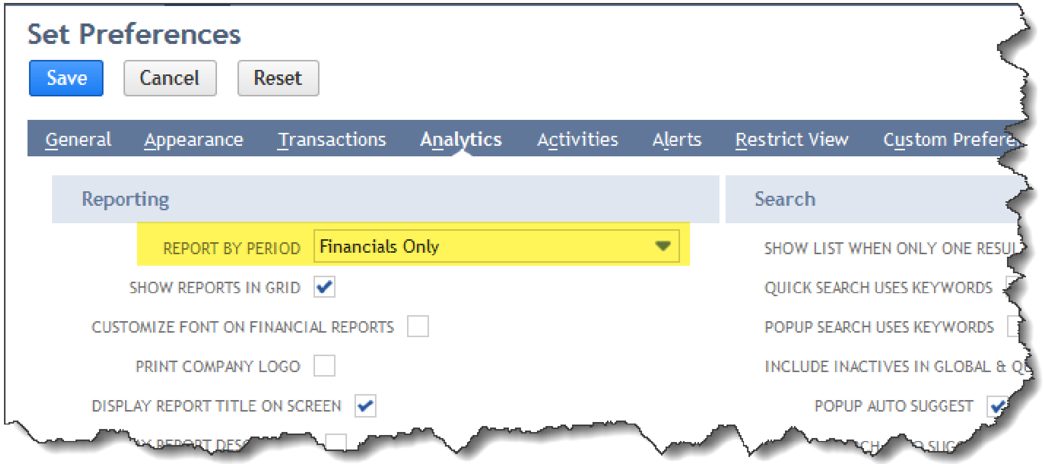
◆ Schema/Records Browser - https://system.netsuite.com/help/helpcenter/en_US/srbrowser/Browser2017_2/script/record/account.html





Home > Set Preferences
Analytics Tab > Report by Period

See HELP: ‘Report by Period: Financials Only Reports’

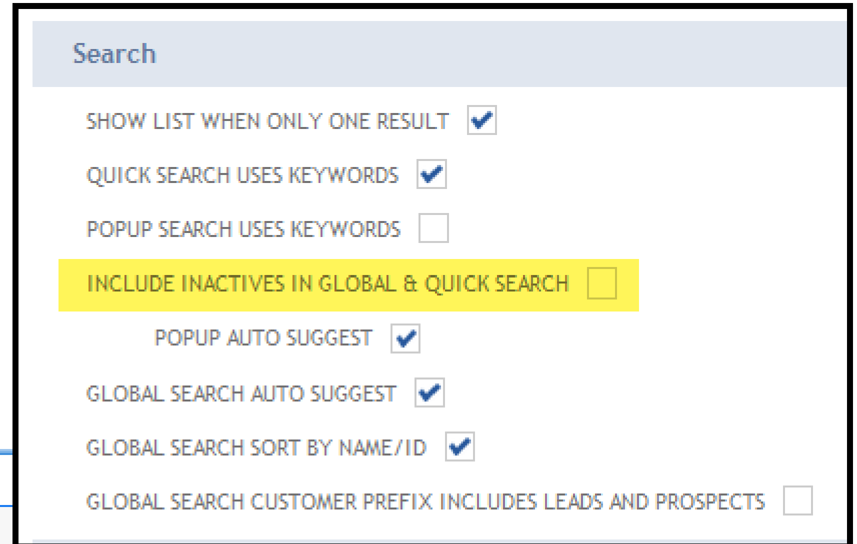


- Dictates what you see on the bottom of reports: dates or periods
- Most run financials by period because the date on the transaction might fall outside of the period.
  - Example: I put the rent bill in on July 30th for August rent (date = July 30, but period = August). If I run the income statement by date, the transaction will be in the July. If I run it by period then it shows up in August.

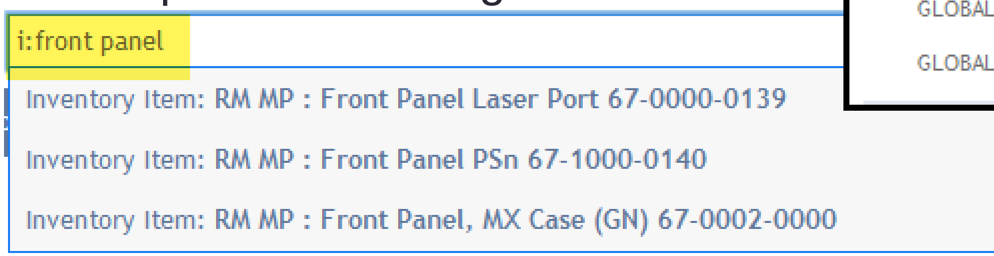
Home > Set Preferences

Analytics Tab > Include Inactives ….

To find inactive records use '+' suffix in search bar

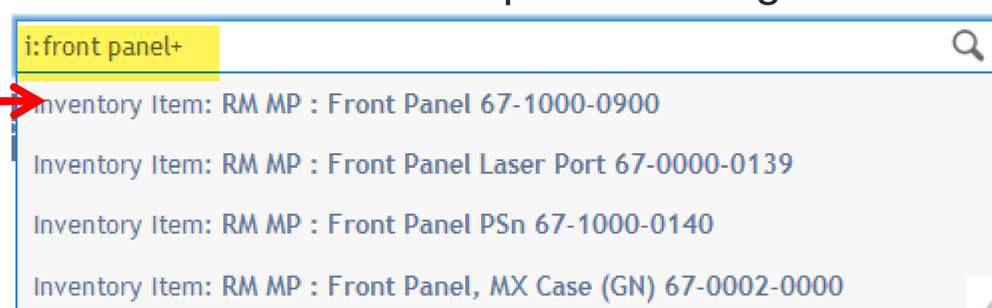


Example without + sign



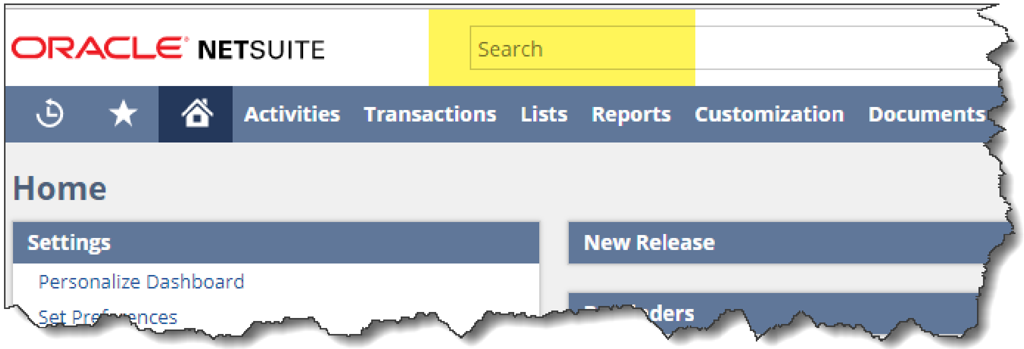
Example with + sign

Inactive item



Global Search

Appears on every page



- Type ahead – suggested matches as you type
- Keyboard shortcut: Alt+G to go to search bar
- Narrow down results: most popular global search operators
- No ‘starts with’ – seems to be ‘contains’
- Results aren’t always what you think they will be – looks in other fields than name/ID

Operator	Description
prefix: (prefix followed by colon) (see next slide)	Find specific record type, saved searches, reports, pages, …
% (percent sign) , _ (underscore)	Wildcards
OR (in capital letters)	Multiple text strings – inclusive OR
Blank between text strings	Multiple text strings – implied AND
+ (plus sign)	Include inactive records

Global Search – Prefixes

A search prefix is made up of the first few characters of a record type plus a colon (:) or a caret (^).

Examples:

- **C:** returns cases, contacts, and customers
- **CU:** returns customers *
- **I:** returns any item, invoice, image
- **Inv:** returns invoice, inventory item
- **Invo:** invoice
- **A:** assembly items, assembly build
- **Serv**: Service items
- **Se**: Saved searches

Note: if only 1 record to be returned and you want it to be in edit mode, capitalize first letter of prefix.

* Note: for **cu** prefix to include leads and prospects, go to Home > Set Preferences > Analytics subtab.

Prefix	Record Type
bil	Vendor Bill
cam	Campaign
cash	Cash Sale
con	Contact
cu	Customer
emp	Employee
est	Estimate
ev	Event
exp	Expense Report
fi	File
invo	Invoice
iss	Issue
it	Item
opp	Opportunity
par	Partner
ph	Phone Call
sales	Sales Order
ven	Vendor

+ more

Global Search – Wildcard

What the He_ k? I didn't know you could do that!

Percent (%) - matches a string of any length (including zero)
Underscore (_) - matches any single character.

Examples:

- **cu:%max** to search for customers with records containing the letters "max", but potentially preceded by other letters. Results could be: Maxwell House, IMAX, Flomax, and Mad Max.
- **inv:115%** to return all invoices starting with 115.
- **cu:m_x** to search for customers with records containing the letters "m" and "x" with any other single character separating the two. Possible results could be: Maxwell House, Mexico Travel, and That Girl Has Moxie.

Global Search – Cool Tips

Include inactive records

- Append + (plus sign) to search keyword
- Example: **cu:max+** to search for both active and inactive customers with records containing the letters max**.**

Multiple text strings - OR

- uppercase OR as a separator between keywords to search for multiple
- Example: **max OR macs OR machs** to search for records containing any of these three strings in one search.

Search for exact text matches only

- Enclose the search string in quotation marks, or follow it with a backslash, to search for records containing only exact matches.
- Example: **cu: “ max”** or **cu:max** to search for customers with a name of Max—Max Fischer LTD. Customers with names only containing the letters max, like Maxam, Lomax, or Maximum Tires, are not returned.
- Note that quotation marks or backslashes are not required for numeric keywords, as these searches return only exact matches.

Return search results in a new browser window: ::

- Add an extra colon between the prefix and the search string to open in a new browser window

Global Search – More Cool Tips

Navigate quickly to NetSuite pages and reports

- Example: **page:cust** to return a list of pages with the name “cust” in any NetSuite page or report (i.e. Forecast by Customer, New Customer Sales, Page Hits by Customers, Online Customer Forms)
- Note: there is no way to distinguish between NetSuite pages, NetSuite reports, and customized reports

Return a single result in edit mode – Capitalize first letter of search prefix

- By default, a single record returned by a global search opens in view mode.
- Examples:
  - **Emp:beth farkel** opens this employee's record in edit mode.
  - **Inv:115** opens invoice number 115 in edit mode.
- Note that you can also open a suggested matching record in edit mode by clicking the Edit link that appears at right when your cursor is over the record in the suggested matches list box.

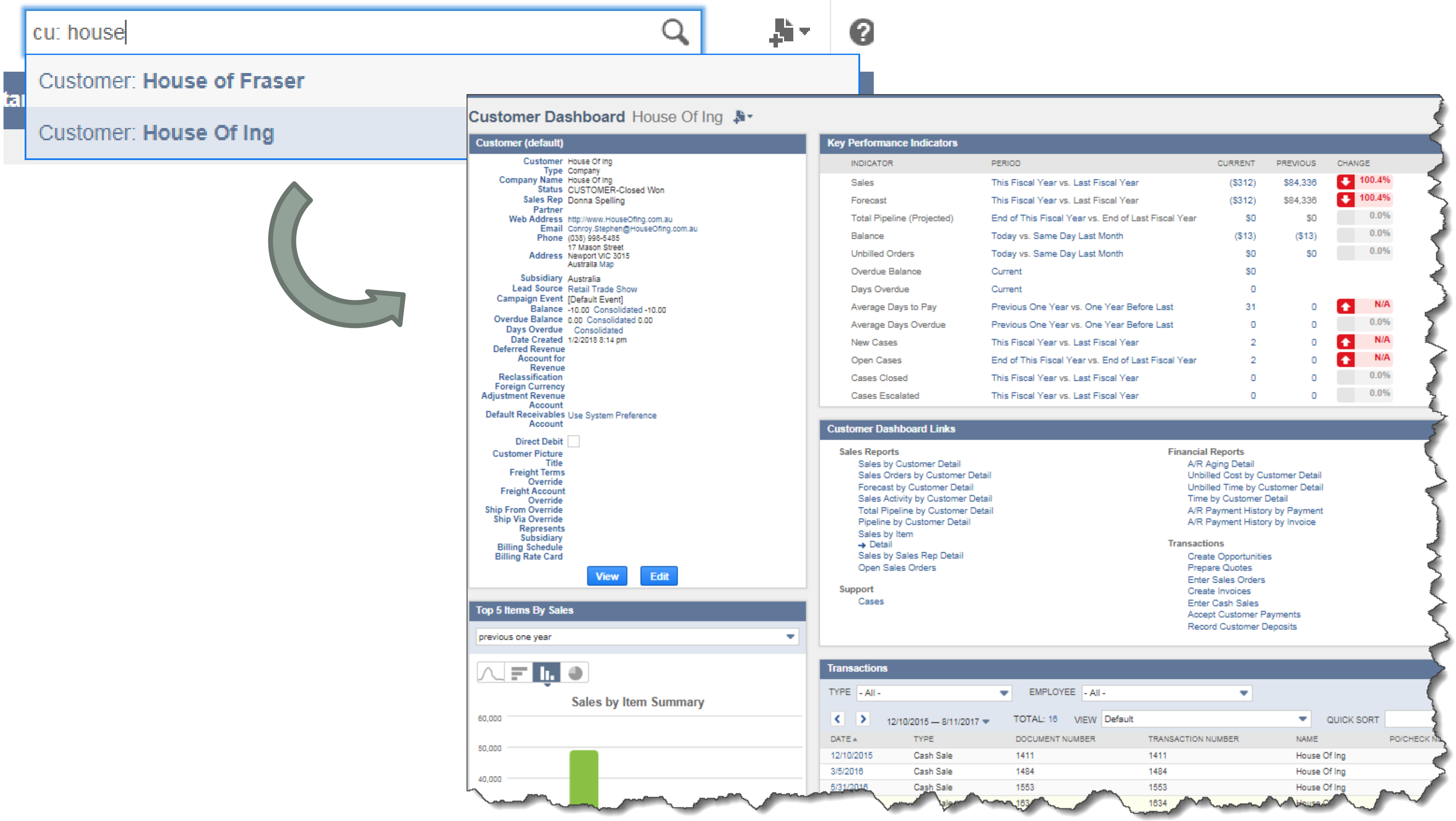
Include custom fields in global searches

- In custom field check the ‘GLOBAL SEARCH’ checkbox
- If greyed out then not available for this record type

Global Search - Open a Customer Dashboard

Open a customer dashboard

- Open a suggested matching customer record in edit mode by clicking the **Dash** link that appears at right when your cursor is over the record in the suggested matches list box.



Reporting in NetSuite

- Reports
  - Access via Reports tab
  - Retrieve, present, and analyze real-time business results using prebuilt reports that can be modified.
- Saved Searches
  - Access via Reports tab or Lists tab
  - Retrieve real-time data from you account that can be run repeatedly for dynamically updated results.
- Next Gen Analytics (beta)
  - Combines the layout of Reports with the functionality of Saved Searches
  - Setup > Company > Enable Features > Analytics tab (check the NEXT GEN ANALYTICS checkbox)
  - Go to Reports > Next Gen Analytics

Tip – For saved searches and reports: be sure everyone is using same reporting criteria – periods vs. dates
Tip – For reports many financial reports can be selected to run via cash or accrual basis even if you selected company to run reports in different method.

NetSuite Reporting - Reports

- Great for financial reporting
- Provides standard reports that can be customized
- Some reports support multiple timeframes for comparison reports – transforms a report into a matrix or crosstab report by selecting a column dimension other than total (ie. Class, Department, Location and time ranges, such as week, month, period)
- Custom Reports (change the layout) are challenging to work with
- Can be scheduled (Reports > Scheduled Reports)
- Pretty layouts
- Can enter description for each report
- Supports graphing
- Limited formulas
- Supports filtering of data
- No highlighting
- No inline editing
- No adhoc sorting
- Some fields sticky – seems to be just date – even when logoff/on
- Supports database queries directly from Excel (Excel Web Query)
- Can run and customize more than 1 report at a time
- Can collapse and expand levels
- Can schedule – good for long running reports

NetSuite Reporting – Saved Searches

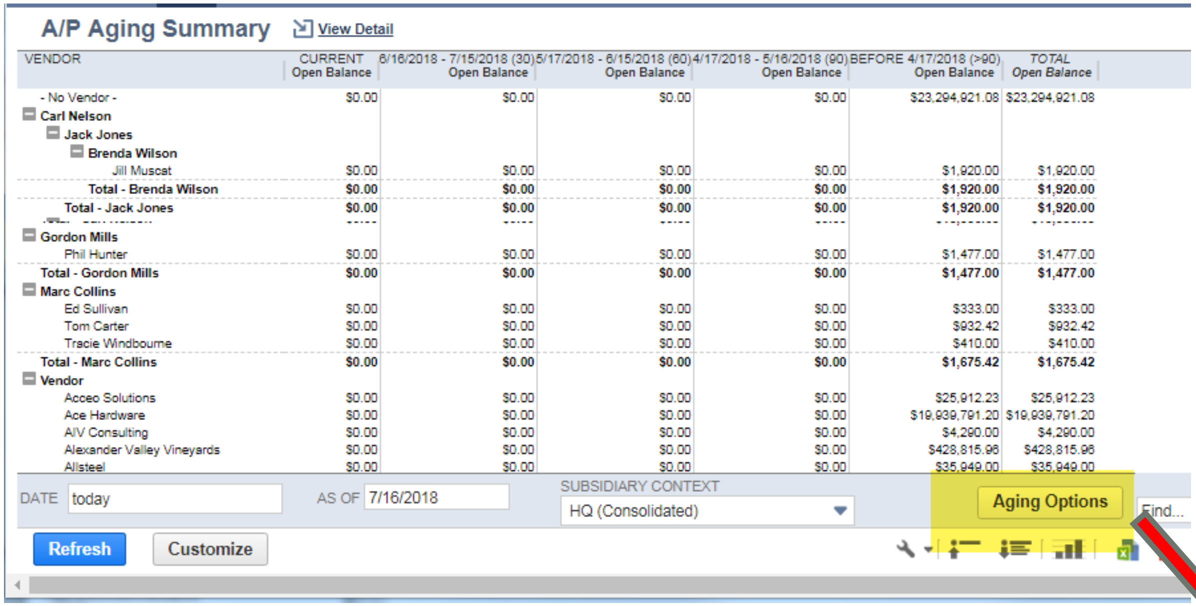
- No standard saved searches to customize
- Powerful formula engine (SQL queries)
- All fields sticky – even when logoff/on
- Supports Inline editing – on some, not all fields
- Supports Highlighting (color, bold, images, …)
- Support filtering
- Pivoting and pretty layouts are difficult *
- Currently limited to single join *
- Limited visual layouts (no subtotals except with grouping or summarized searches) *
- No descriptions on saved searches
- Can only run/edit 1 saved search at a time
- Can pass parameters to saved searches
- Saved searches can link to other saved searches
- Cannot collapse and expand levels, but can drill into summarized search results
- Can be scheduled – good for long running searches
- Used in many other areas of NetSuite rather than just for reporting (see next slide)

* Note: NextGen Analytics engine fixes these limitations

Saved Searches – The Places You will Go

- In Workflows and SuiteScripts
- Exports to CSV for later use to import and update NS records
- Custom Field derived from summary saved search
- Display in Dashboard portlets (reports can too with snapshots)
- Used for KPIs
- On website – publish saved search results
- In the Reminder portlet
- In shortcuts (reports work here too)
- For email alerts – alert targeted users about changes to records
- Email results – scheduled or based on update
- Display in Shortcuts (reports can also be used here)
- Can be used to define default list view for specific roles/employees
- Item Filter on transaction forms to reduce selection results (SuiteAnswers 9048)

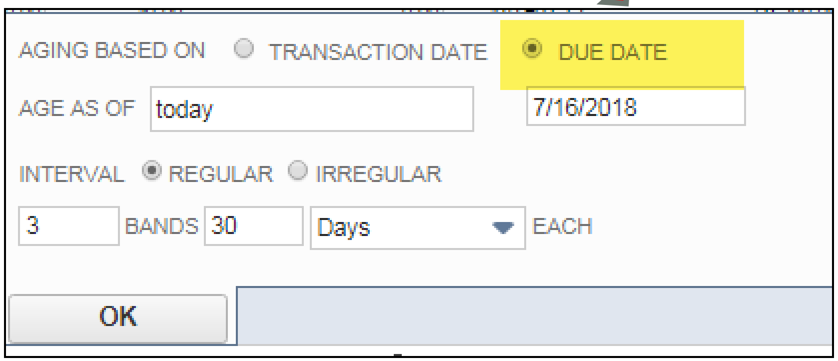
Reports – Tip for Aging Reports A/R and A/P



A/P Aging Summary

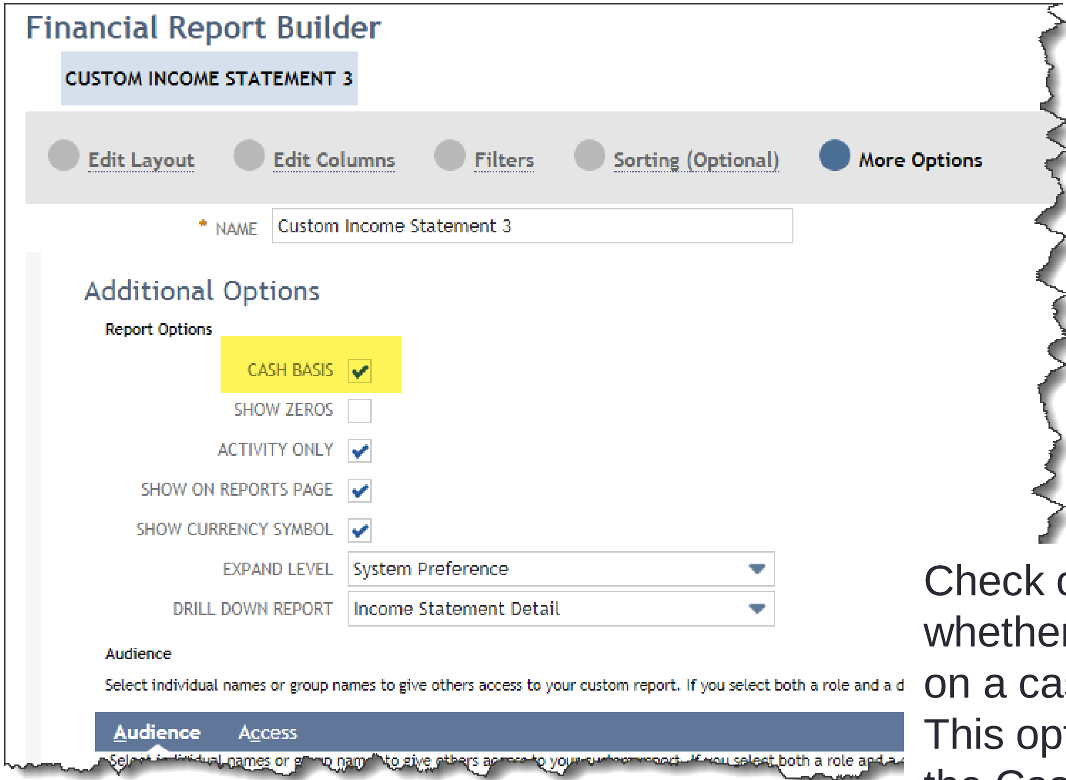
View Detail

VENDOR	CURRENT Open Balance	6/16/2018 - 7/15/2018 (30) Open Balance	5/17/2018 - 6/15/2018 (60) Open Balance	4/17/2018 - 5/16/2018 (90) Open Balance	BEFORE 4/17/2018 (>90) Open Balance	TOTAL Open Balance
- No Vendor -	$0.00	$0.00	$0.00	$0.00	$23,294,921.08	$23,294,921.08
Carl Nelson						
Jack Jones						
Brenda Wilson						
Jill Muscat	$0.00	$0.00	$0.00	$0.00	$1,920.00	$1,920.00
Total - Brenda Wilson	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$1,920.00**	**$1,920.00**
Total - Jack Jones	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$1,920.00**	**$1,920.00**
Gordon Mills						
Phil Hunter	$0.00	$0.00	$0.00	$0.00	$1,477.00	$1,477.00
Total - Gordon Mills	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$1,477.00**	**$1,477.00**
Marc Collins						
Ed Sullivan	$0.00	$0.00	$0.00	$0.00	$333.00	$333.00
Tom Carter	$0.00	$0.00	$0.00	$0.00	$932.42	$932.42
Tracie Windbourne	$0.00	$0.00	$0.00	$0.00	$410.00	$410.00
Total - Marc Collins	**$0.00**	**$0.00**	**$0.00**	**$0.00**	**$1,675.42**	**$1,675.42**
Vendor						
Acceo Solutions	$0.00	$0.00	$0.00	$0.00	$25,912.23	$25,912.23
Ace Hardware	$0.00	$0.00	$0.00	$0.00	$19,939,791.20	$19,939,791.20
AIV Consulting	$0.00	$0.00	$0.00	$0.00	$4,290.00	$4,290.00
Alexander Valley Vineyards	$0.00	$0.00	$0.00	$0.00	$428,815.96	$428,815.96
Allsteel	$0.00	$0.00	$0.00	$0.00	$35,949.00	$35,949.00



Info

Reports – Tips



Some reports can report on cash basis vs. accrual basis

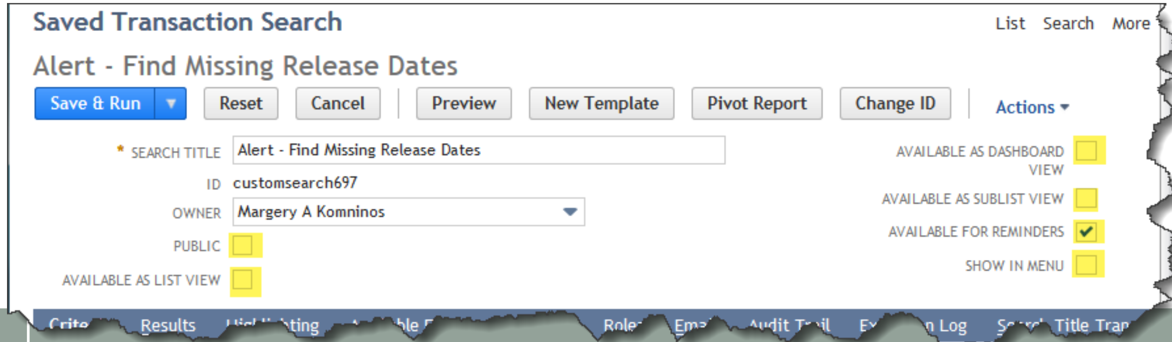
Check or clear this box to indicate whether data for this report should be on a cash or accrual basis.
This option defaults to the setting for the Cash Basis Reporting preference at Setup > Accounting.

Info

Saved Searches – Tips

- Create a naming convention for Saved Searches
  - Examples:
    - MK.KPI (person's initials.what it relates to)
    - MK.TRX.SO (person's intials.record.subtype if transactions)
    - ***MK.ITEM (use *** to indicate high importance)
- Create saved searches on saved searches
- Create custom record to record descriptions of saved searches
- Put searches and reports into bookshelves
  - see LinkedIn - Shelly Gore; See article "NetSuite: Create a Custom Corporate Library"
- Appoint 1st Subject Matter Expert (SME) on your internal team for saved searches.
  - Side Note: Additional SMEs could focus on Customization, Form Design, Workflow and Business Process Mapping. Send SMEs to NetSuite Training sessions on their subject matter.

Saved Searches – Be Careful What You Check For



Public	Check only if you really want to make it public.
Available as List View	Check this box to make this search's results available to audience members as a view for lists of this kind of record. Audience members then can use this custom list view for records by selecting the saved search name in the **View** field.
Available as Dashboard View	Check this box to make this search's results available to audience members as a **dashboard list portlet** of this kind of record.
Available as Sublist View	Check this box to make this search's results available to audience members as a view for sublists on lists of this kind of record. Audience members then can use this sublist view for records by selecting the saved search name in the View field.
Available for Reminders	check this box to allow saved search to be selected or display in the audiences reminder portlet on the home page.
Show in Menu	limit what to show in menu or you might get overwhelmed; if not checked you can still find it when you search your saved searches

Power of the System Notes

- Oops… I didn't mean to make that change, but I can't recall what I changed.
- Provides Audit trail
  - For most records and transactions - Under **System Information** or Under **History > System Information**
  - For pages under SETUP - view audit Trail via "More" at top of each screen for Limited. If it only says "Add to shortcuts' then it's NA.
- Captures Changes
  - who, what, when, role, type of change, old value/new value
  - Can modify what is displayed
- Can be reported on via saved searches or Audit Trail under Transactions or Lists
- Custom fields are auto-enabled if 'Store Value' is checked on custom field
- Custom fields caveats:
  - Text Area - stores value ☺ (4K char limit)
  - Free-form – stores value ☺ (300 char limit)
  - Long Text – only stores # chars ☹ (1M char limit)
  - Rich Text - only stores # chars ☹ (100K char limit; supports RTF)

DEMO

Getting Data In/Out of NetSuite

- Getting Data Out 

  - Export from saved search
  - CSV exports
  - SuiteAnalytics – ODBC connector (pure SQL Access) for 3rd party programs
  - NS developer via SuiteTalk or Restlets
  - 3rd party connectors

- Getting New Data In: 
  - Manually enter records
  - CSV import
  - NS Developers via SuiteTalk or Restlets
  - 3rd party connectors

Getting Data Updated

Updating Records in NetSuite

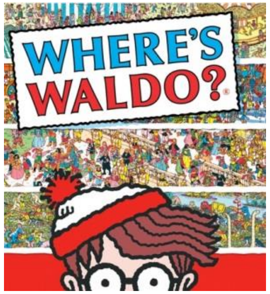
- Saved Search or List Editing – inline editing (slow process so limit to few records)
- Updating many records – in order by preference
  1. Mass Update – Tip: make sure you can undo easily if you apply an update
  2. CSV Import – Tip: test on small group of records if no sandbox
  3. SuiteFlow (workflow) written by a NetSuite administrator or developer
  4. SuiteScript written by a super NS admin or NetSuite developer) – last choice unless you have a developer on staff
  5. SuiteTalk and Restlets – even more complex than SuiteScript (suggest only if it's on a regular basis)
- 3rd party tools – may be needed to transfer data between systems on a regular basis

DEMO

More Tips & Tricks

- Where's Waldo – finding information on a page
- It's Sticky – What's Sticky?
- How to send to multiple emails
- Finding Correct Permission for a Role
- Shortcuts for Saved Search Results
- Shortcuts for Date Fields
- Shortcuts for Entering Data
- Other Shortcuts
- SuiteIdeas
- Online User Groups – NetSuite, Slack, LinkedIn

Tip - Records and Pages
Where did that field go?



- On NetSuite Records, transactions, setup, Reports and Search results
  - If you think there is a field on the page then unroll it and use your browser find – ctrl+F
  - On search results – use browser find (CTRL+F)
  - Remember to roll it back up as it is sticky for that record type

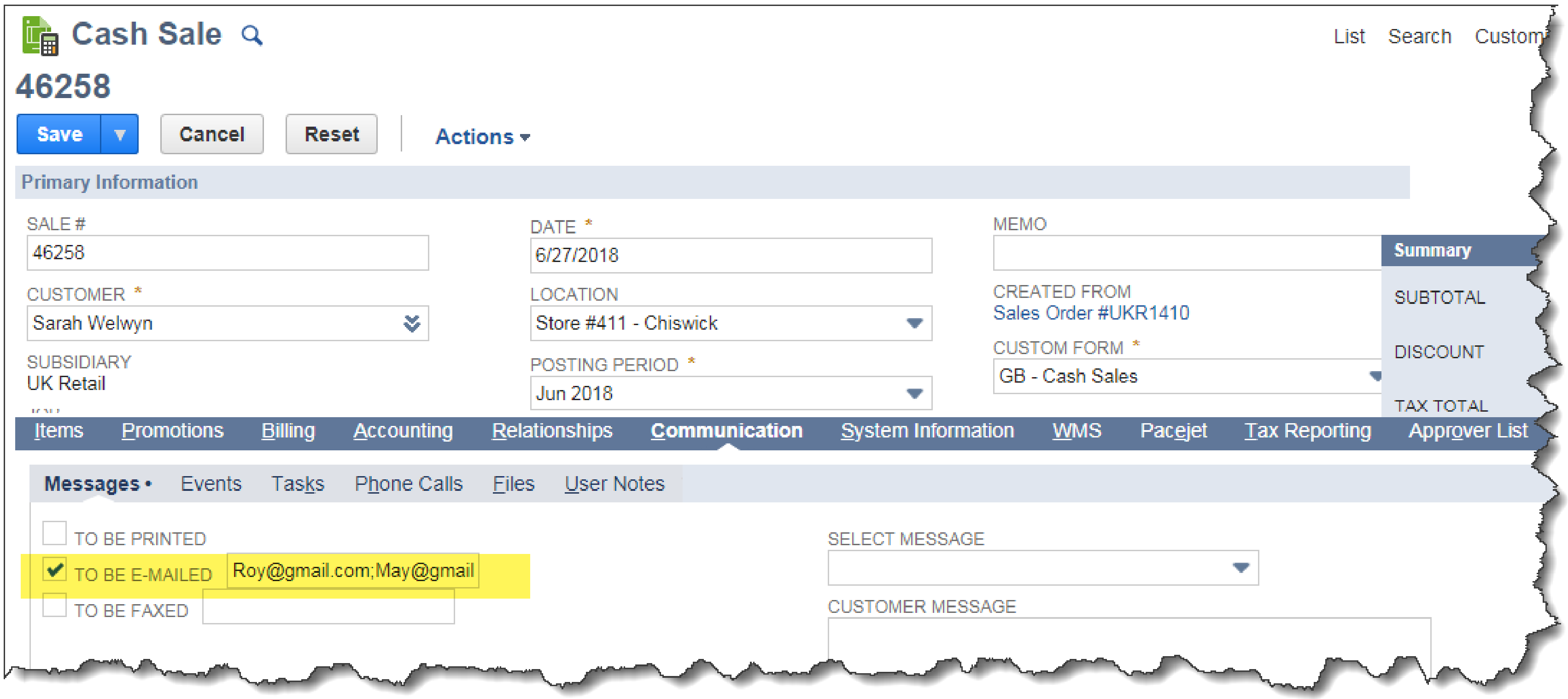
Tip - Records and Pages
It's Sticky – What's Sticky?

Sticky fields – (even after logging off and back on)

- Transactions and Lists records – view and type are sticky
- Reports – only date seems to be sticky (other fields are inconsistent)
- Saved Searches – all fields are sticky
- Records – unrolled vs. rolled
  - To unroll - click icon located to the far right on subtabs line
  - To roll back up - icon is hidden until you hover over the subtabs line

DEMO

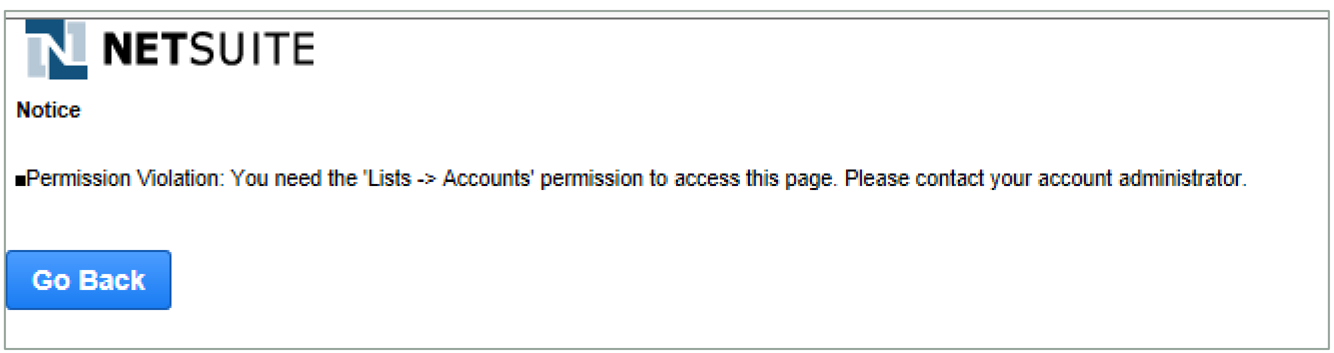
Tip – How to send to multiple emails



- Enter multiple emails – separate emails by **;** and no space
- Works with transactions (e.g. SO, PO, invoice, cash sale) and cases (cases can use comma or semi-colon)

Tip -What Permission is needed?

- Have someone with the permission (Admin always does) do what you are trying to do.
- Have them copy the URL and send it to you.
- When logged in to NetSuite, paste the URL in and see what error you get.
- The error will tell you which permission is needed. Copy and send to your administrator.



Note: for alternative solution see Suite Answer 19370

Tip – Shortcut Saved Searches Results

Shortcuts for Direct List Editing

- **ALT + X** to edit the first direct editable field (left most column, first row.)
- **ALT + Q** to move cursor to the first field in the quick add row.
- **CTRL + Z** to reset the value of the selected field.
- **Tab** to move right through editable fields in a row.
- **Shift + Tab** to move left through editable fields in a row.
- **Enter** to move down through editable fields in a column.
- **Shift + Enter** to move up through editable fields in a column..

Tip - Shortcuts for Date Fields

inline editing, online forms, transaction forms

- Press **t** to enter today's date
- Press **Shift + t** to enter tomorrow's date
- Press **y** to enter yesterday's date
- Press **p** to enter the end of the current period (if you use accounting periods)
- Press **m** to enter the last day of the month
- Press **L** to enter the last day of the prior month
- Press **+** (plus key) to increase one day
- Press **–** (minus key) to decrease one day

note: all letters above are case insensitive

Info

Tip - Shortcuts for Entering Data

- **Enter** key to save the transaction while in transaction header
- **Enter** key to save the line and go to the next line while on a transaction line
- **Tab** to move the cursor between fields and buttons.
- **Spacebar** to check or clear a checkbox.
- **Amount** fields, enter numbers to calculate by addition or subtraction.
  - For example, enter 10 + 15 to calculate a total amount.
- Press and hold **CTRL** while clicking with your mouse to select multiple choices in a list.

Tip - Other Shortcuts

ALT-G to move the cursor to the Global Search field. (if you have the Google toolbar, this won't work).

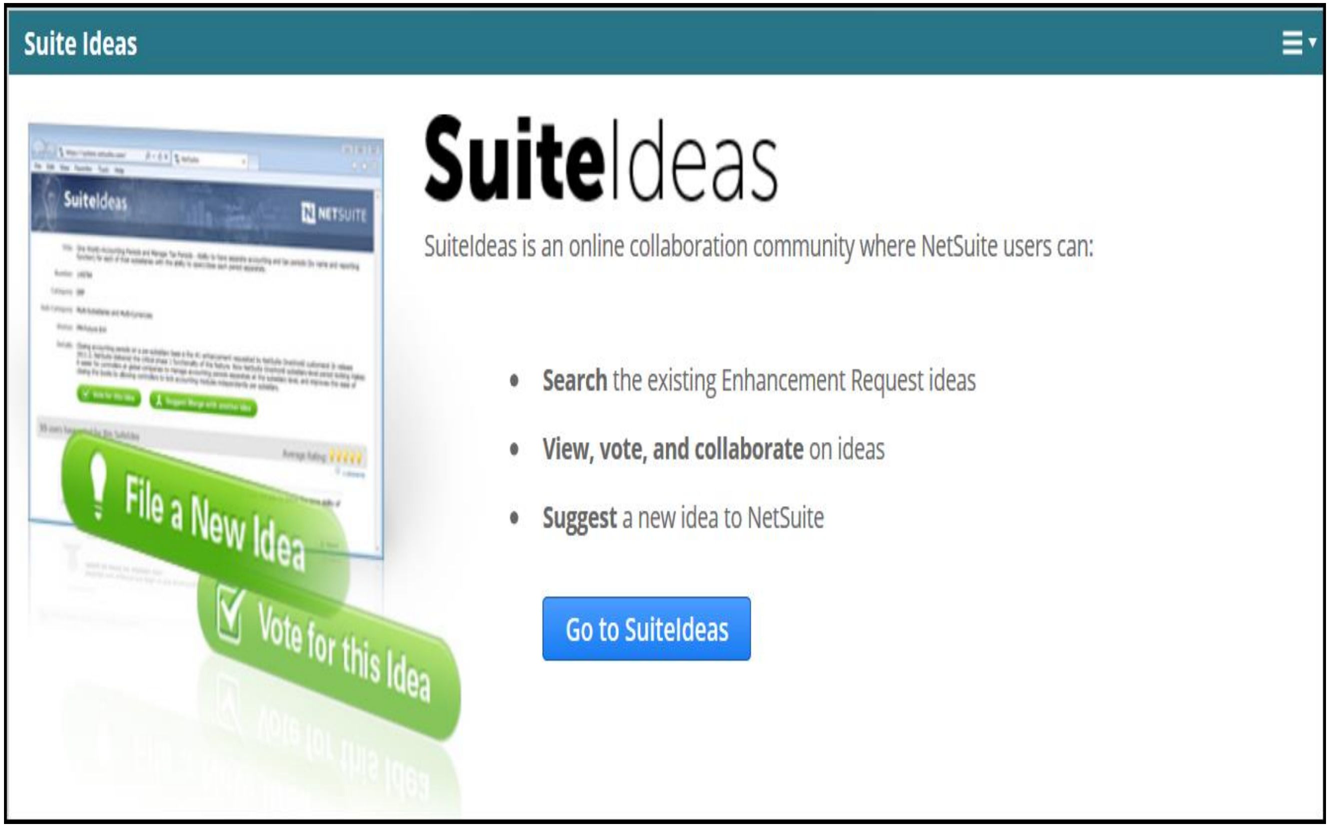
Navigating Subtabs: switch between tabs on forms.

- Press and hold **ALT** and then press the corresponding letter to switch to that subtab. The cursor appears in the first field on the subtab.

Viewing Reports

- Press Page Up to go to the previous page of a report.
- Press Page Down to go to the next page of a report.
- Press Home to go to the first page of a report.
- Press End to go to the last page of a report.

SuiteIdeas

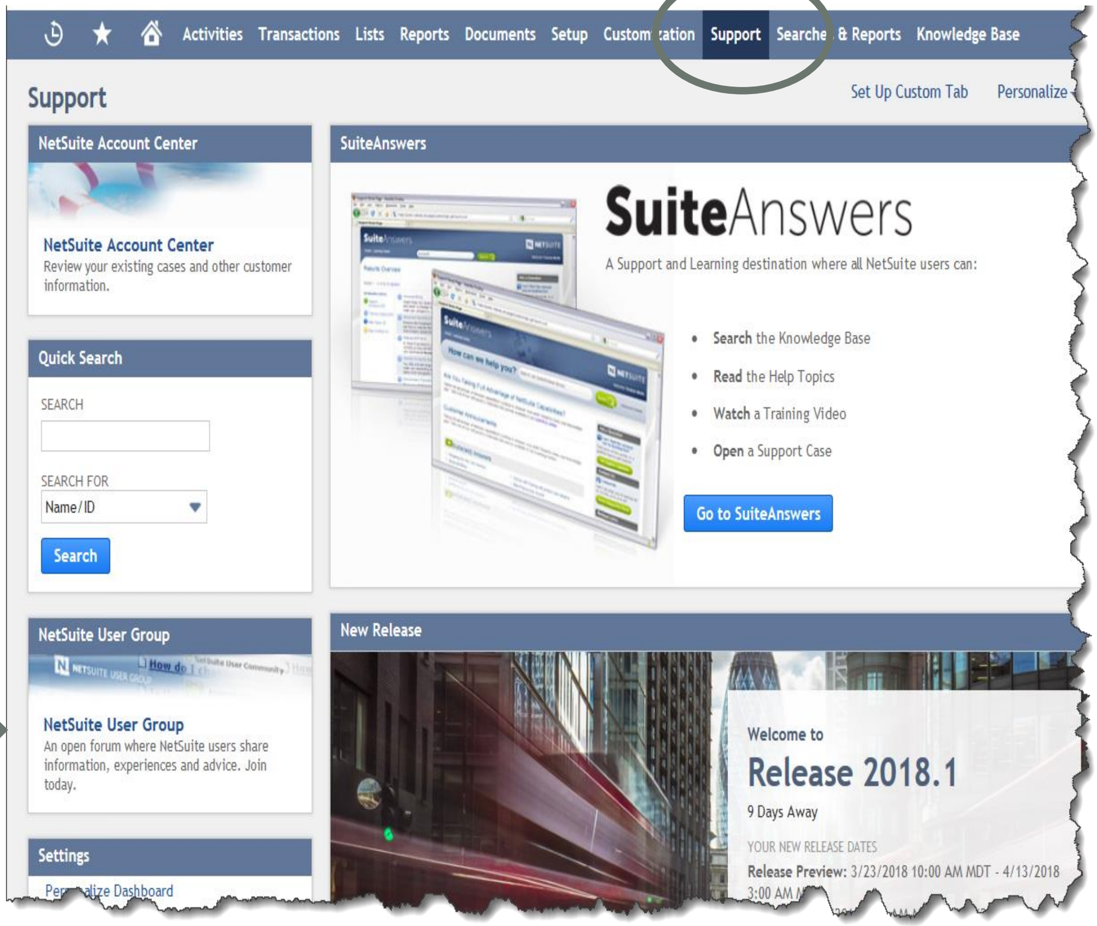


You will need to assign the Netsuite Support Center to the Employee records you wish to have access..

SuiteIdeas

Enter new features you would like to see in the product or to see if there is already a feature requested for that you would like to vote on.

Official Online NetSuite User Group



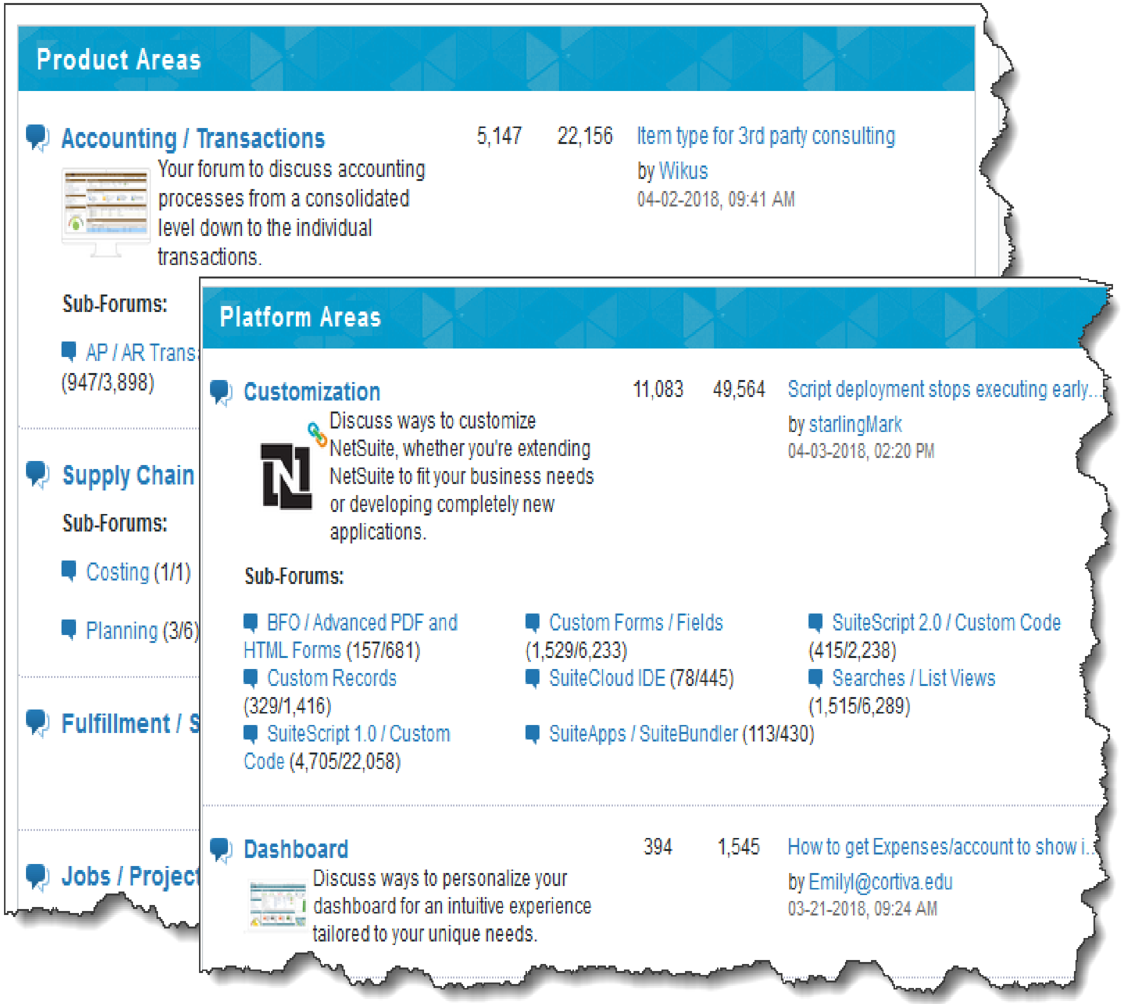
Or go to

https://Usergroup.netsuite.com/users

More of a community bulletin board (an online discussion site)

Info

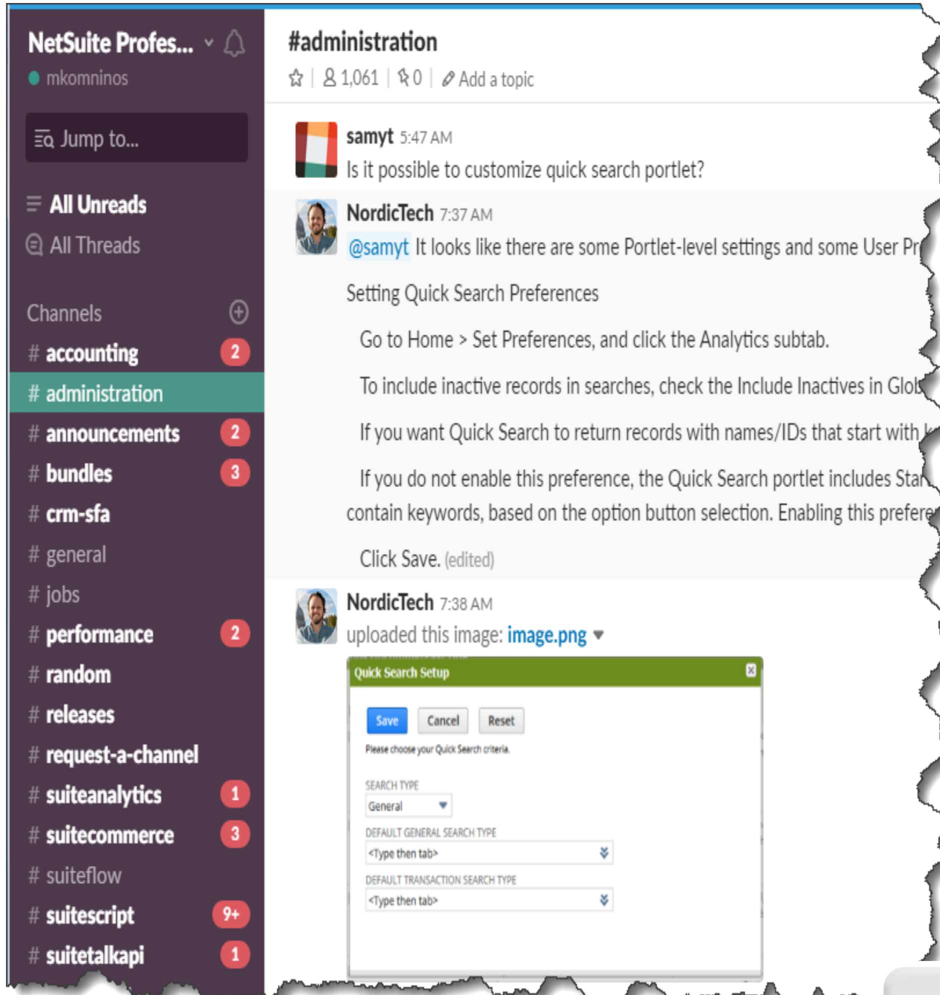
Official Online NetSuite User Group - details



- **NetSuite Announcements**
- **Latest Release info**
- **Best Practices**
- **Product Areas**
- **Platform Areas**

NetSuite Professionals Slack Community

- Tight knit community
- Segmented by interest
- Fastest feedback
- An always open chat line
- 2000+ users
- To request an invitation: http://netsuiteprofessionals.com/
- Non-affiliated user group



Info

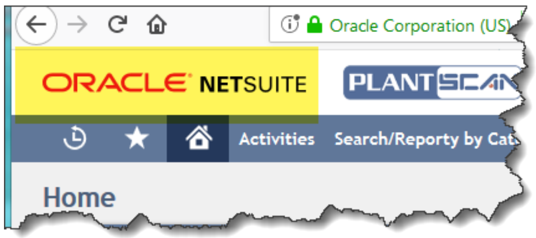
Online - LinkedIn Groups

- **Official NetSuite Community Network** – 6K+ members
- Non-affiliated **NetSuite User Group** – 11K+ members
- Non-affiliated **NetSuite Users Group** – 5K members
- **Rocky Mountain NetSuite User Group Forum**
  - private for members only of the RMNSUG (local user group)

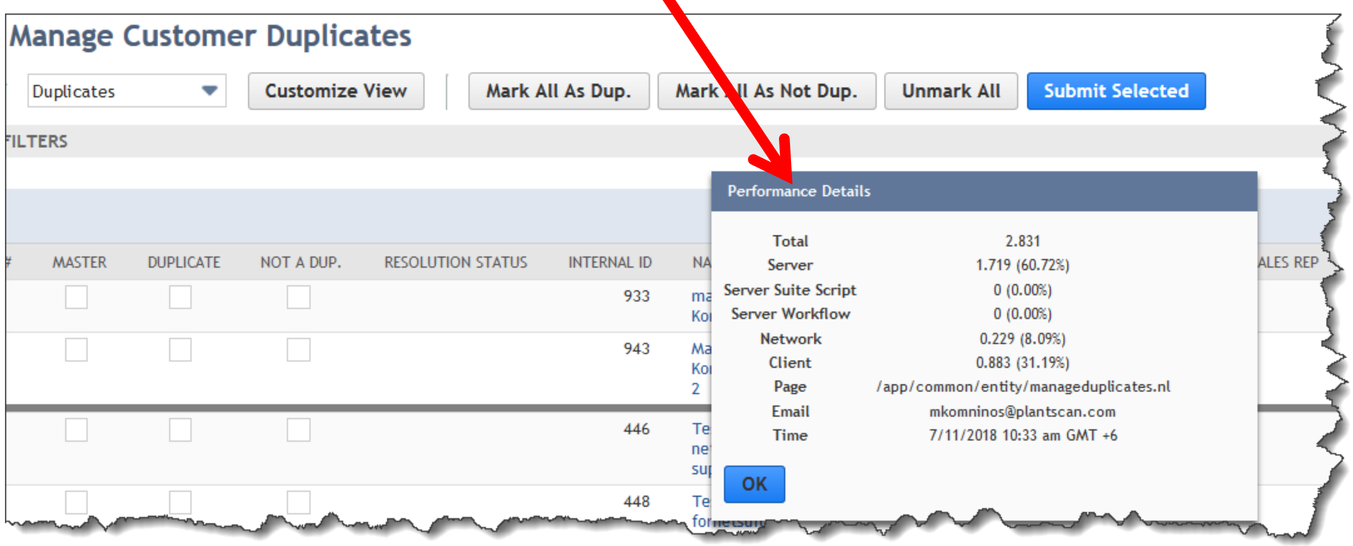
Note: Most of these are for marketing by NetSuite and 3rd parties, but there are so pearls found in them

Performance Details for the Page

Click on Oracle/NetSuite logo from any page



Results



Where do you want to come back to visit and spend more time?

We will be covering in depth:

- September 2018: Customizations (fields, records, lists, centers, and tabs)
- November 2018: Overview and Deep Dive Advanced Saved Searches