


BACK TO BASICS & REFRESHER TOPICS

Margie Komninos

PlantScan Corporation




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?
-
- 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
-
-  = advanced information

NetSuite Help!!

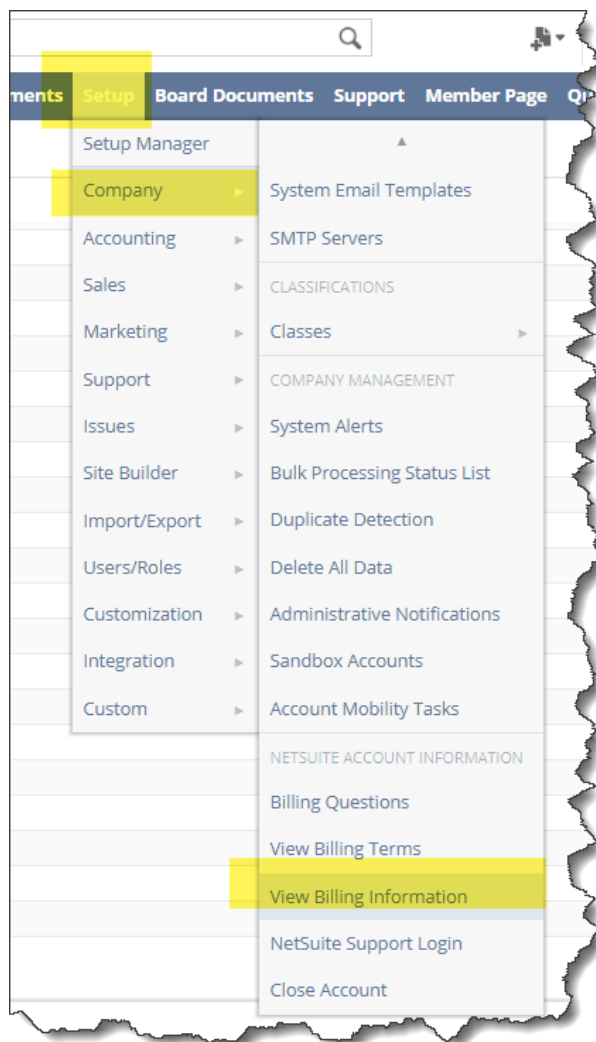


- How many user licenses have we used?
- NetSuite  Help
- NetSuite Account Center
- SuiteAnswers

◆ 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**

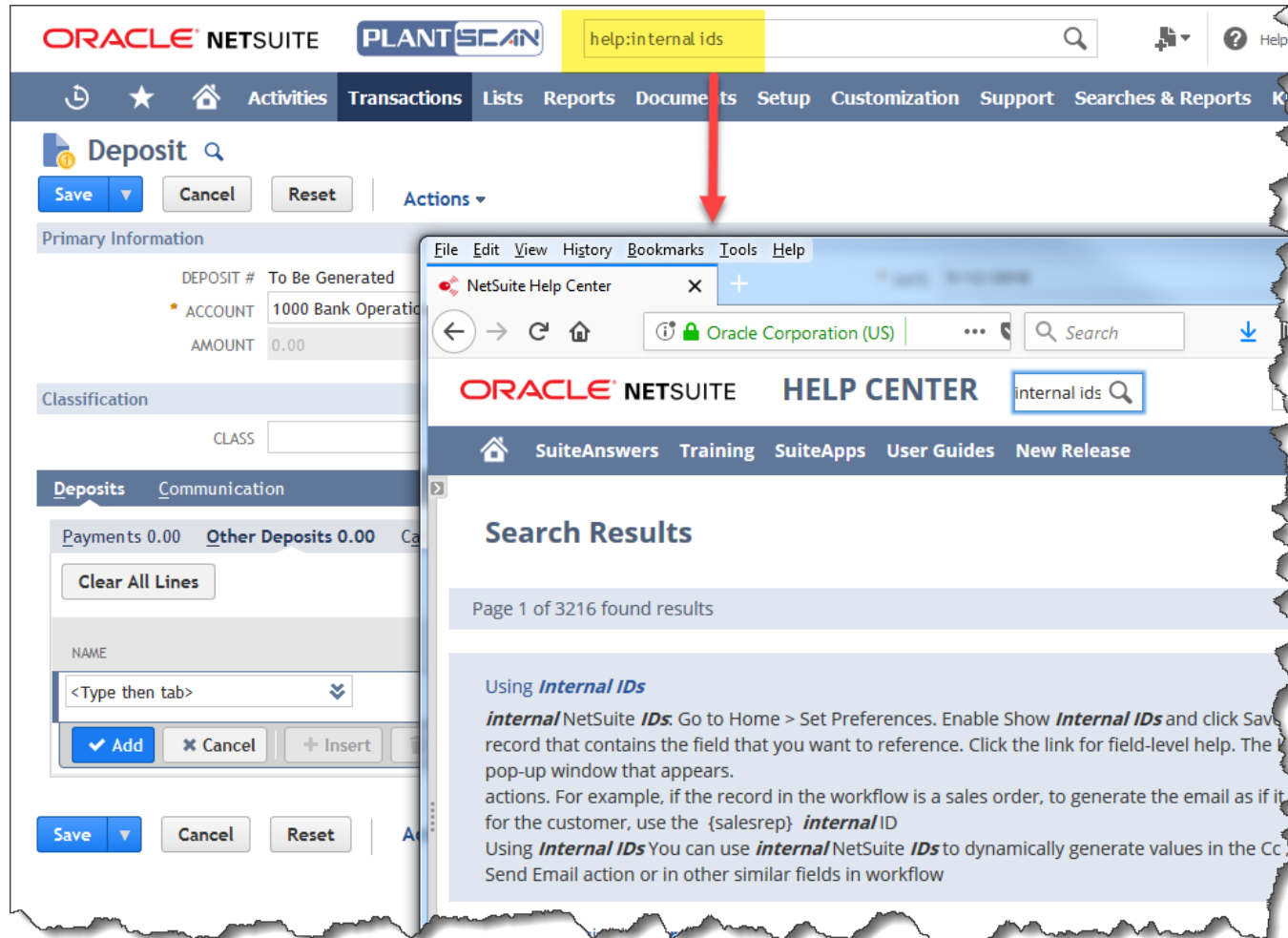
NetSuite Help Center

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

The image shows a screenshot of the NetSuite web interface. At the top, the Oracle NetSuite logo is visible, along with a search bar and a user profile for Margery A Komninos, PlantScan - Administrator. A yellow button with a question mark icon and the word "Help" is highlighted. A red arrow points from this button to a separate window titled "NetSuite Help Center". This window displays the NetSuite Help Center interface, which includes a search bar, a language selector set to "English (U.S.)", and a navigation menu with options like SuiteAnswers, Training, SuiteApps, User Guides, and New Release. The main content area of the help center window shows a breadcrumb trail: Home > Accounting > Banking > Deposits > Making Deposits. The title "Making Deposits" is prominently displayed, followed by a brief explanation: "Make a deposit in NetSuite to record funds you deposit into your bank account. For a deposit, you can select payments related to existing transactions, add funds not related to transaction payments, and record any cash received back from the bank." A "Note" section follows, stating: "Many organizations post customer payments to the Undeposited Funds ledger account rather than to a specific bank account. This Undeposited Funds posting prevents a time lag between the amount shown on your books for a bank account and the bank statement. When you record a deposit, NetSuite moves funds out of the Undeposited Funds account to the ledger account for the bank account, which accurately reflect bank account balances. If you record customer payments directly to a bank account rather than to Undeposited Funds, you may not see the correct balance on your bank statement." The background of the main NetSuite interface shows a "Deposit" form with fields for DEPOSIT #, ACCOUNT, and AMOUNT, and a "Classification" section.

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.

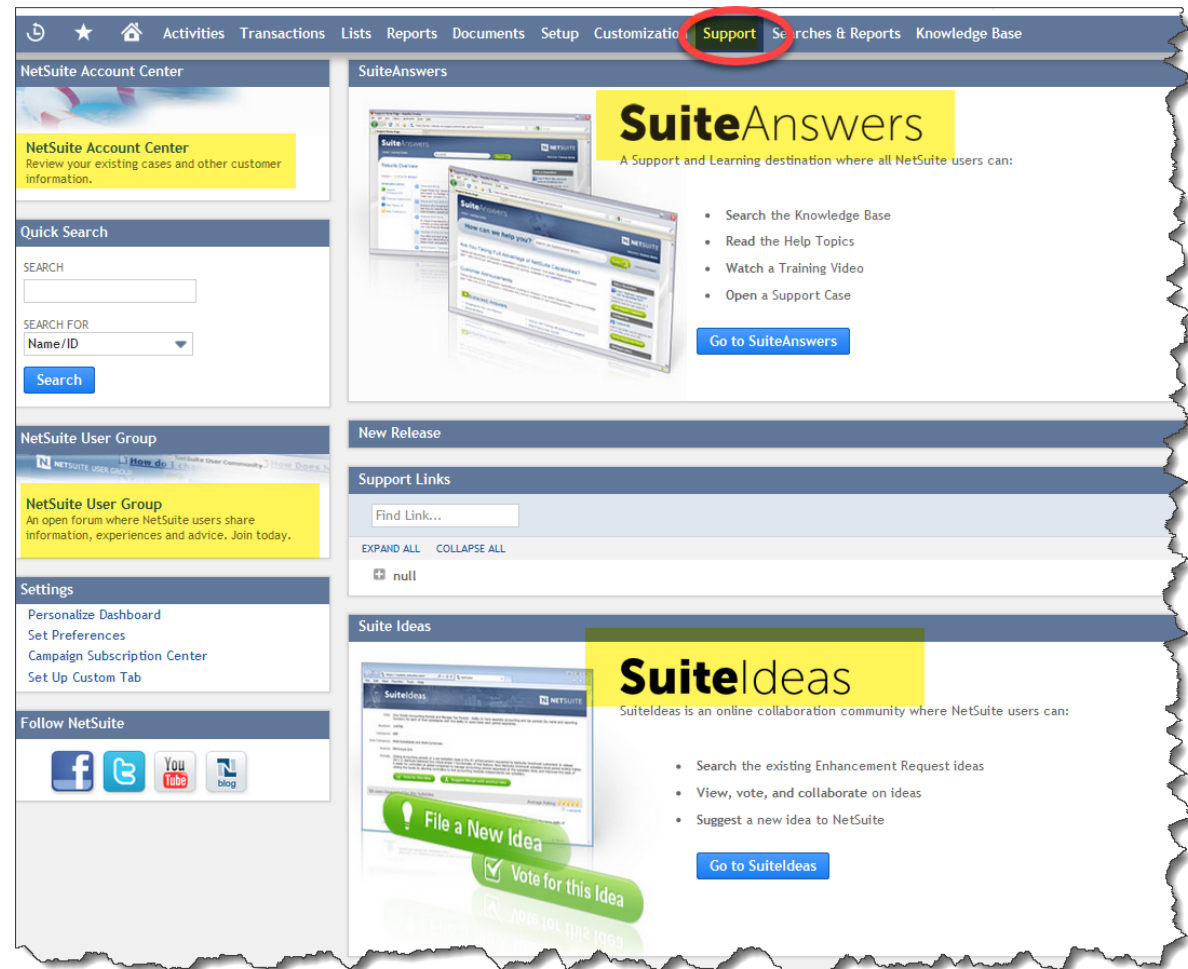
100+ user guides

The screenshot displays the Oracle NetSuite Help Center interface. At the top, the 'ORACLE NETSUITE' logo is on the left, and 'HELP CENTER' is in the center. A search bar is located on the right. Below the header, a navigation bar contains links for 'SuiteAnswers', 'Training', 'SuiteApps', 'User Guides' (which is highlighted in yellow), and 'New Release'. The main content area is divided into two columns. The left column, titled 'Table of Contents', lists various topics with expandable icons: Account Administration, NetSuite Basics, SuiteAnalytics (Dashboards, Searches, & Reports), Employee Management, Marketing, Sales Force Automation, and Partners, NetSuite for Outlook, Projects, Order Management, Accounting, Item Record Management, Inventory Management, Manufacturing, Vendors, Purchasing, and Receiving, Support Management, Commerce, SuiteFlow (Workflow), SuiteCloud (Customization, Scripting, and Web Services), SuiteSocial, NetSuite Mobile, SuiteApps, New Release, Additional Resources, Training Resources, User Guides (highlighted), Videos, Glossary, Frequently Asked Questions, and Help Center Weekly Updates. The right column, titled 'User Guides', contains sections for 'User Guides' (with a description: 'These PDF guides provide conceptual details for specific areas of...'), 'Release Notes' (with a link to 'NetSuite 2018.1 Release Notes'), 'Sneak Peeks' (with a link to 'NetSuite 2018.1 Sneak Peeks'), 'NetSuite Basics' (with a link to 'NetSuite Basics Guide'), and 'Accounting (ERP) and Banking Guides' (with links to 'Advanced Revenue Management', 'Amortization Guide', 'Banking Guide', 'Electronic Bank Payments', 'Financial Statements Guide', 'Fixed Assets Management Guide', 'General Accounting Guide', 'Legacy Revenue Recognition', 'Multi-Book Accounting Guide', 'Projects Guide', and 'Statistical Accounting Guide').

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

Customer Center - Home Links		Quick View	
Billing		Outstanding Balance	
		Current	\$0
		Open Cases	
		Current	249
		Open Estimates	
		Current	1
Support			
Make a Payment			
Print a Statement			
See A/R Register			
See All Transactions			
Contact Venda Support			
Contact Support			
See Support Cases			
See Support Issues			
Edit Your Profile			

SuiteAnswers

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

A banner graphic for SuiteAnswers. It features a teal header with the text "SuiteAnswers". Below the header, on the left, are three overlapping browser window mockups showing the SuiteAnswers interface. On the right, the text "SuiteAnswers" is displayed in a large, bold, black font. Below this, a subtitle reads "A Support and Learning destination where all NetSuite users can:". To the right of the subtitle is a bulleted list of four actions: "Search the Knowledge Base", "Read the Help Topics", "Watch a Training Video", and "Open a Support Case". At the bottom right is a blue button with the text "Go to SuiteAnswers".

SuiteAnswers

SuiteAnswers

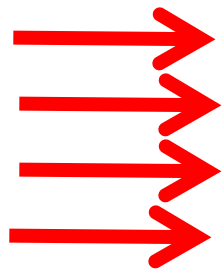
A Support and Learning destination where all NetSuite users can:

- **Search** the Knowledge Base
- **Read** the Help Topics
- **Watch** a Training Video
- **Open** a Support Case

[Go to SuiteAnswers](#)

SuiteAnswers

Example



SuiteAnswers

Home | Training Videos

saved searches Search

Results Overview

Results 1 - 10 of 6965 for saved searches

1 2 3 4 5 6

All Results (6997)

- Support Articles (5651)
- Training Videos (32)
- Help Topics (1282)
- SuiteWorld Presentations (32)

Employee Saved Search Reports

Employee Management Employees Analytics and Reporting Employee Reports Employee **Saved Search** Reports Employee **Saved Search** Reports Important

Saved Searches

SuiteAnalytics (Dashboards, **Searches**, & Reports) **Search Saved Searches Saved Searches** A **saved search** is a reusable **search** definition, that can have many advanced **search** filters and results display...

Defining a Saved Search

SuiteAnalytics (Dashboards, **Searches**, & Reports) **Search Saved Searches Defining a Saved Search** Defining a **Saved Search** To create a **saved search**, you need access a **saved search** definition page for a...

nlobjSearch

SuiteCloud (Customization, Scripting, and Web Services) SuiteScript SuiteScript 1.0 SuiteScript 1.0 API SuiteScript Objects nlobjSearch nlobjSearch <

Accessing a Saved Search

SuiteAnalytics (Dashboards, **Searches**, & Reports) **Search Saved Searches Accessing a Saved Search** Accessing a **Saved Search** To find a **saved search**

SuiteAnswers Training Videos

Many Topics

The screenshot shows the SuiteAnswers Training Videos page. The header includes the SuiteAnswers logo, a navigation bar with 'Home' and 'Training Videos' (highlighted), and a search bar. The main heading is 'SuiteAnswers Training Videos' with a subtext: 'Watch training videos to get started with NetSuite, learn about new features, or replay a recorded training webinar.' Below this is a 'Training Videos' tab. On the left is a 'Browse Training' sidebar with a list of categories, where 'Getting Started' is highlighted. The main content area is titled 'Getting Started' and shows a list of 14 training videos, each with a video icon, title, and user rating (5 stars). The list includes 'Logging In and Security Best Practices', 'Navigating NetSuite', 'Navigating Records and Forms', 'Getting Help', 'Setting Your Personal Preferences', 'Personalizing the Home Dashboard', 'Using Global Search', 'Using Quick Search', 'Working With Lists', and 'Managing Your Activities'. The page also indicates 'You are viewing 1 - 10 of 14 Results' and has pagination links '1 2 >'.

SuiteAnswers

Home **Training Videos** Enter your search keywords... Search Search Tip

SuiteAnswers Training Videos

Watch training videos to get started with NetSuite, learn about new features, or replay a recorded training webinar.

Training Videos

Browse Training

- Getting Started**
- 2018.1 New Feature Training
- 2017.2 New Feature Training
- Training Webinars
- Administration/Data
- CRM (Customer Relationship Mgmt)
- Contract Renewals
- Customization/Integration
- ERP: Financials, SCM, etc.
- Manufacturing/WMS
- Ecommerce
- Financial Management
- International
- Items/Fulfillment/Billing
- Marketing
- OpenAir
- Order Management

Getting Started

You are viewing 1 - 10 of 14 Results

	Logging In and Security Best Practices	User Rating ★★★★★
	Navigating NetSuite	User Rating ★★★★★
	Navigating Records and Forms	User Rating ★★★★★
	Getting Help	User Rating ★★★★★
	Setting Your Personal Preferences	User Rating ★★★★★
	Personalizing the Home Dashboard	User Rating ★★★★★
	Using Global Search	User Rating ★★★★★
	Using Quick Search	User Rating ★★★★★
	Working With Lists	User Rating ★★★★★
	Managing Your Activities	User Rating ★★★★★

You are viewing 1 - 10 of 14 Results

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



NetSuite Status Page

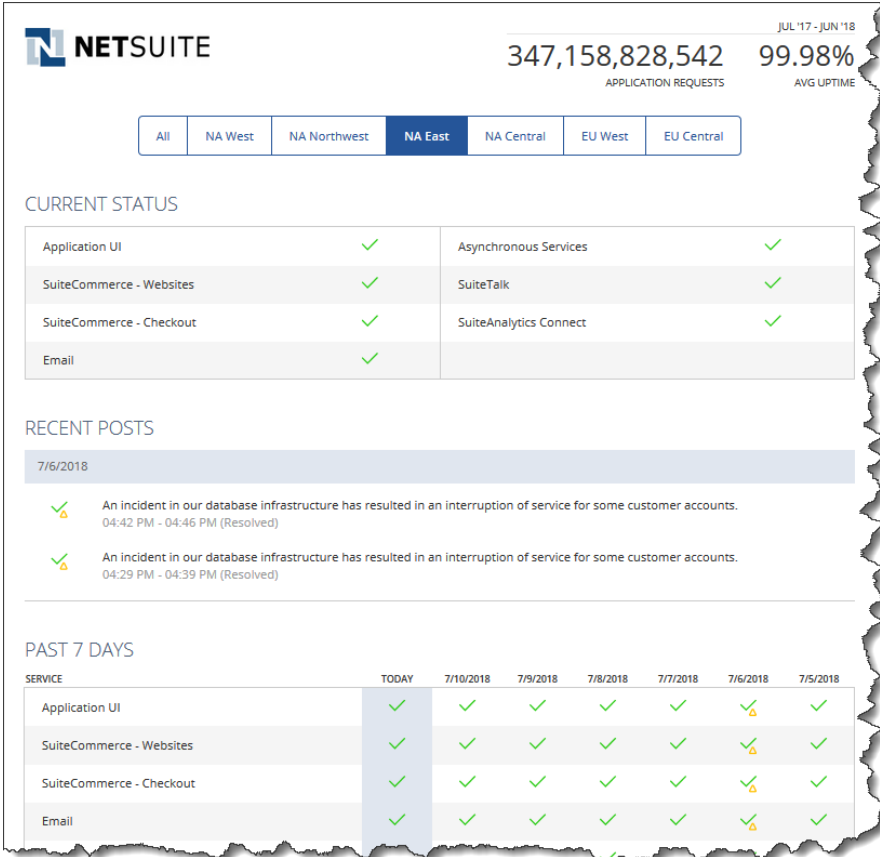
<https://status.netsuite.com>

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



The screenshot shows the NetSuite Status Page. At the top, the NetSuite logo is on the left, and the statistics '347,158,828,542 APPLICATION REQUESTS' and '99.98% AVG UPTIME' are on the right, with a date range of 'JUL '17 - JUN '18'. Below this is a navigation bar with tabs for 'All', 'NA West', 'NA Northwest', 'NA East' (selected), 'NA Central', 'EU West', and 'EU Central'. The 'CURRENT STATUS' section contains a table with four rows: 'Application UI', 'SuiteCommerce - Websites', 'SuiteCommerce - Checkout', and 'Email', each with a green checkmark. To the right of this table are two more rows: 'Asynchronous Services' and 'SuiteTalk', each with a green checkmark. Below the current status is the 'RECENT POSTS' section, showing two incidents from 7/6/2018, both resolved. At the bottom is the 'PAST 7 DAYS' section, which is a table showing service status for 'Application UI', 'SuiteCommerce - Websites', 'SuiteCommerce - Checkout', and 'Email' from 'TODAY' back to '7/5/2018'. The 'TODAY' column shows green checkmarks for all services. The other columns show green checkmarks for 'Application UI' and 'SuiteCommerce - Checkout', and a yellow triangle with a green checkmark for 'SuiteCommerce - Websites' and 'Email' on 7/6/2018.

SERVICE	TODAY	7/10/2018	7/9/2018	7/8/2018	7/7/2018	7/6/2018	7/5/2018
Application UI	✓	✓	✓	✓	✓	✓	✓
SuiteCommerce - Websites	✓	✓	✓	✓	✓	⚠	✓
SuiteCommerce - Checkout	✓	✓	✓	✓	✓	⚠	✓
Email	✓	✓	✓	✓	✓	⚠	✓

New Release Portlet

Two releases each year:
Q1 and Q3

Displays your scheduled
upgrade

The screenshot shows the 'New Release' portlet interface. At the top, a teal header bar contains the text 'New Release' and a menu icon. Below the header is a large banner image of a city street with a red double-decker bus and the Gherkin building. Overlaid on the right side of the banner is a white box with the text: 'Welcome to Release 2018.1', '29 Days Away', and 'YOUR NEW RELEASE DATES'. Below the banner, there are three columns of content. The first column is titled 'Global Financials' and describes the Multi-Subsidiary Customer feature. The second column is titled 'Global Supply Chain' and describes the Supply Chain Snapshot feature. The third column is titled 'SuiteCommerce' and describes the new webstores feature. Each column has a 'LEARN MORE' button. Below these columns is a light blue bar with the text 'See more new features >>'. At the bottom, there is a row of five icons with labels: 'Sneak Peeks', 'Release Notes', 'Release Preview Login', 'Release Preview Test Plan', and '2018.1 Overview'. A small footnote at the bottom center reads: '1 Average upgrade time is less than one hour. Your time may vary.'

Welcome to Release 2018.1
29 Days Away
YOUR NEW RELEASE DATES
Release Preview: 3/15/2018 9:00 AM PDT - 5/11/2018 2:00 AM PDT
Upgrade: 5/11/2018 12:00 AM PDT - 5/11/2018 2:00 AM PDT¹

Global Financials
Use Multi-Subsidiary Customer for a single, clear view of customers across multiple subsidiaries eliminating duplication. Introduce more flexibility in the multi-book environment by activating each subsidiary separately. Reduce operational overhead with intelligent transaction matching rules. Fulfill additional local regulatory requirements for China, Japan, Malaysia, Thailand.
[LEARN MORE](#)

Global Supply Chain
Gain a comprehensive view and granular control of global inventory demand and supply with Supply Chain Snapshot. Streamline order management with Cross Subsidiary Fulfillment to process orders efficiently in a global environment. Track inventory valuation accurately with the landed cost capability using Inbound Shipment Management.
[LEARN MORE](#)

SuiteCommerce
Quickly launch new webstores with SuiteCommerce Standard. Deliver an engaging brand experience with Theme Customizer. Monitor your website with Domain Health Status Indicators. Generate a new sitemap regularly with Sitemap Generator Scheduler. Never miss a sale when the Point of Sale system is offline with the new Fallback solution.
[LEARN MORE](#)

See more new features >>

[Sneak Peeks](#) [Release Notes](#) [Release Preview Login](#) [Release Preview Test Plan](#) [2018.1 Overview](#)




¹ Average upgrade time is less than one hour. Your time may vary.

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




Home
Calendar: RMN

RMNSUG Calen

SUN	MON
29	30
6	7
13	14
20	21
27	28


Calendar Detail



 Help

 Margery Komninos
Rocky Mountain NetSuite User Group - Administrator

Member Page **Quick Links**

Log Out 

View All Roles

Rocky Mountain NetSuite User Group - Administrator (RP)


Rocky Mountain NetSuite User Group - Administrator

Rocky Mountain NetSuite User Group - Bookkeeper

Rocky Mountain NetSuite User Group - Marketing Manager

Rocky Mountain NetSuite User Group - Custom Administrator

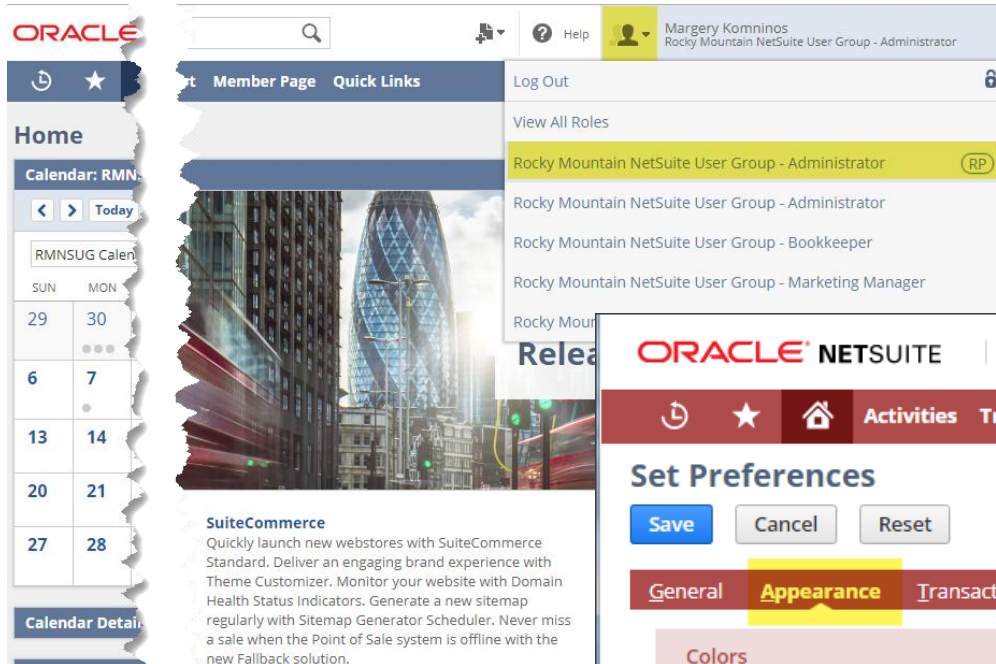
Release 2018.1



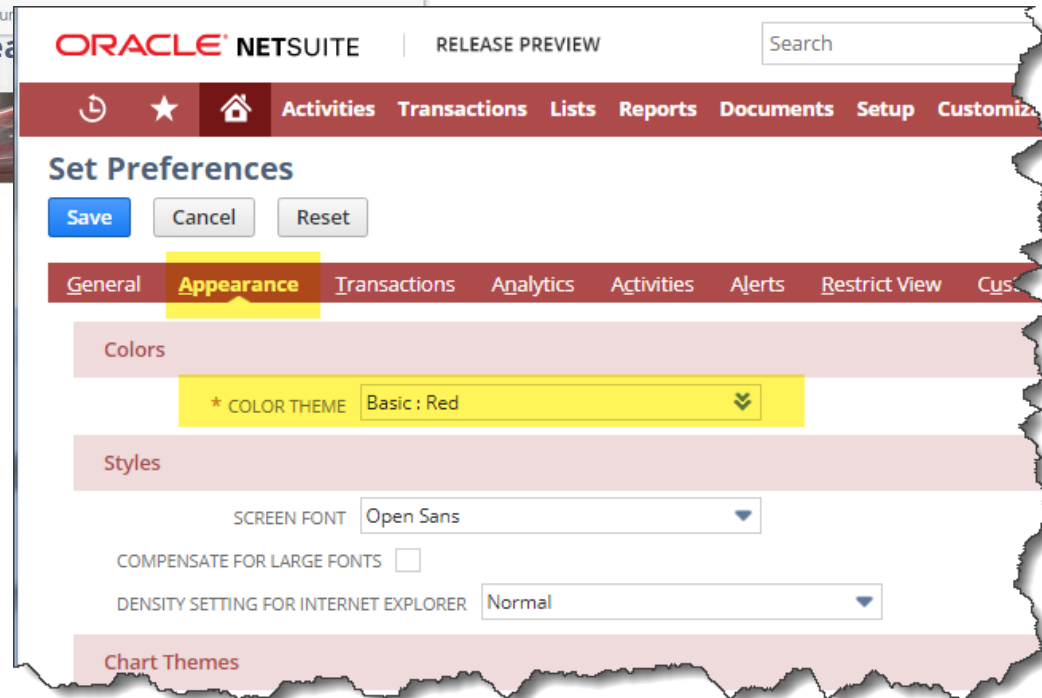
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Gain a comprehensive view and granular control of global inventory demand and supply with Supply Chain Snapshot. Streamline order management with Cross Subsidiary Fulfillment to process orders efficiently in a global environment. Track inventory valuation accurately with the landed cost capability using Inbound Shipment Management.

Tip – Change Color of Beta Site



- For EVERY person with access:
- For prerelease
 - After EVERY sandbox refresh



SuiteBundler

- **Bundles/SuiteApps**

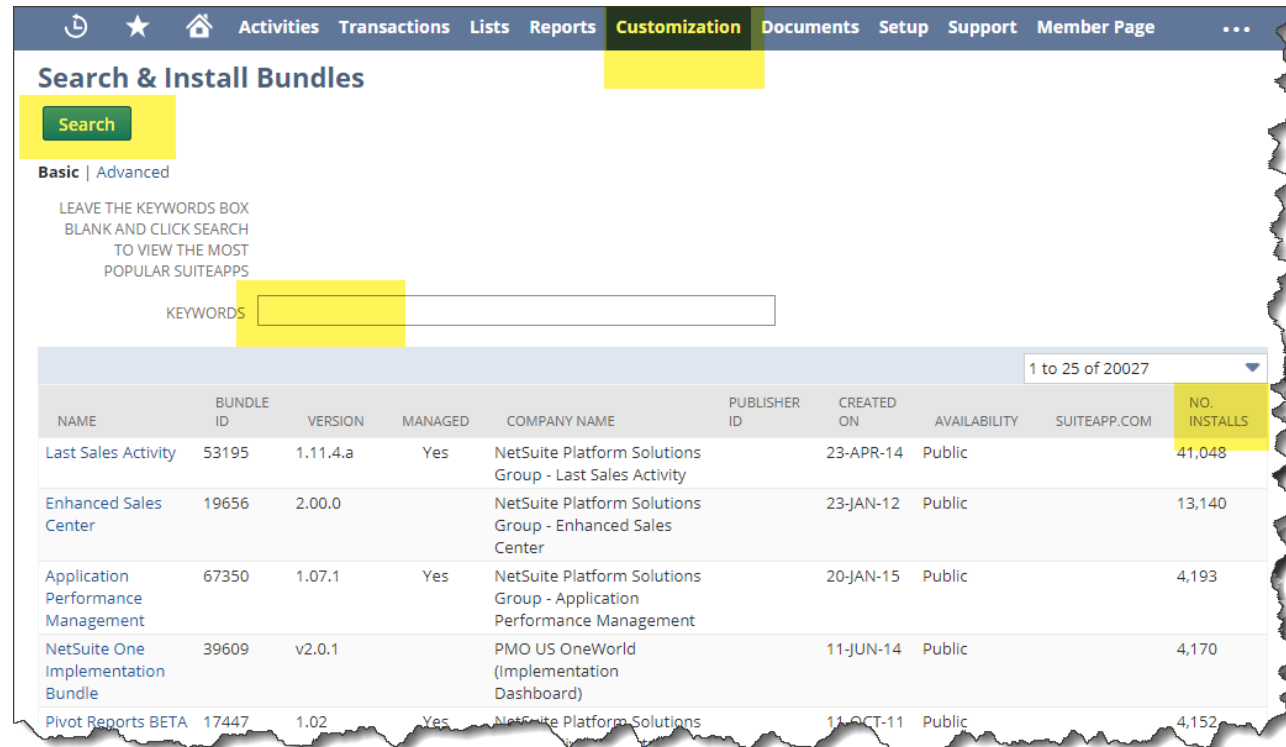
- NetSuite users package groups of objects for distribution to other accounts.

- **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



Search & Install Bundles									
Basic Advanced									
LEAVE THE KEYWORDS BOX BLANK AND CLICK SEARCH TO VIEW THE MOST POPULAR SUITEAPPS									
KEYWORDS <input type="text"/>									
1 to 25 of 20027									
NAME	BUNDLE ID	VERSION	MANAGED	COMPANY NAME	PUBLISHER ID	CREATED ON	AVAILABILITY	SUITEAPP.COM	NO. INSTALLS
Last Sales Activity	53195	1.11.4.a	Yes	NetSuite Platform Solutions Group - Last Sales Activity		23-APR-14	Public		41,048
Enhanced Sales Center	19656	2.00.0		NetSuite Platform Solutions Group - Enhanced Sales Center		23-JAN-12	Public		13,140
Application Performance Management	67350	1.07.1	Yes	NetSuite Platform Solutions Group - Application Performance Management		20-JAN-15	Public		4,193
NetSuite One Implementation Bundle	39609	v2.0.1		PMO US OneWorld (Implementation Dashboard)		11-JUN-14	Public		4,170
Pivot Reports BETA	17447	1.02	Yes	NetSuite Platform Solutions		11-OCT-11	Public		4,152

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.



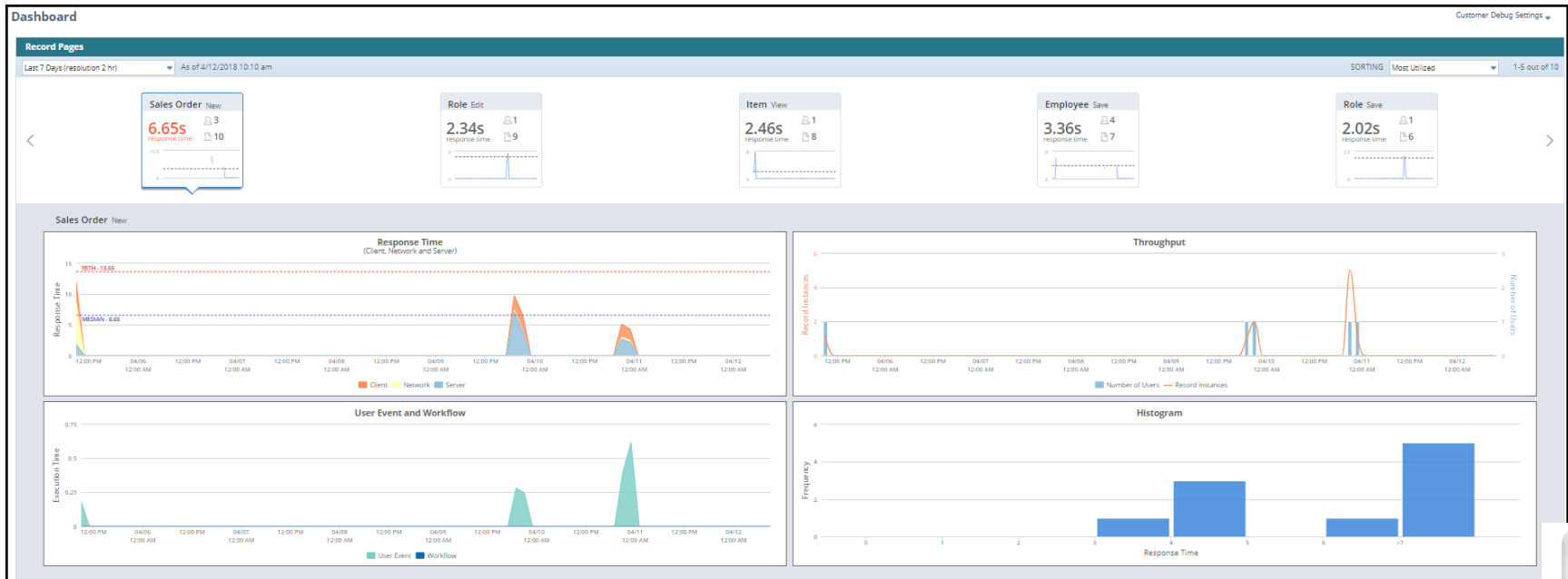
Application Performance Management

- 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, thrupt, ...



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)

High Level Process Overviews

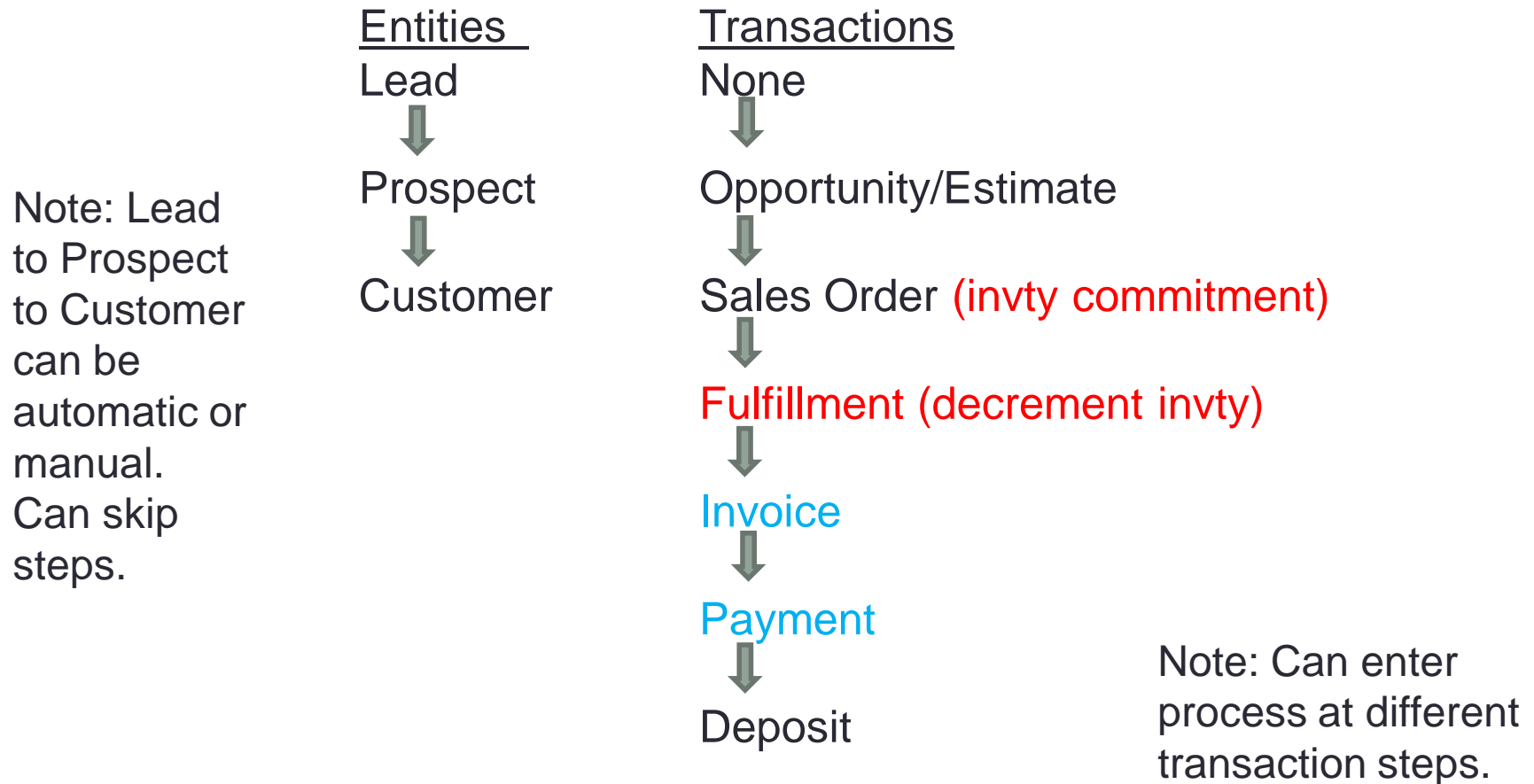
\$\$\$ IN

- Lead to Cash with and without Inventory

\$\$\$ Out

- Purchase to Pay Process Overview with and without Inventory

Lead to Cash Process Overview (\$ IN)



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

Entities

Customer

Transactions

Invoice (decrement invty)



Payment



Deposit

Text in red = related to inventory transactions

Purchase to Pay Process Overview (\$ OUT)

Entity
Vendor

Transactions
Purchase Request



Purchase Order



Item Receipt (increment invty)



Vendor Bill



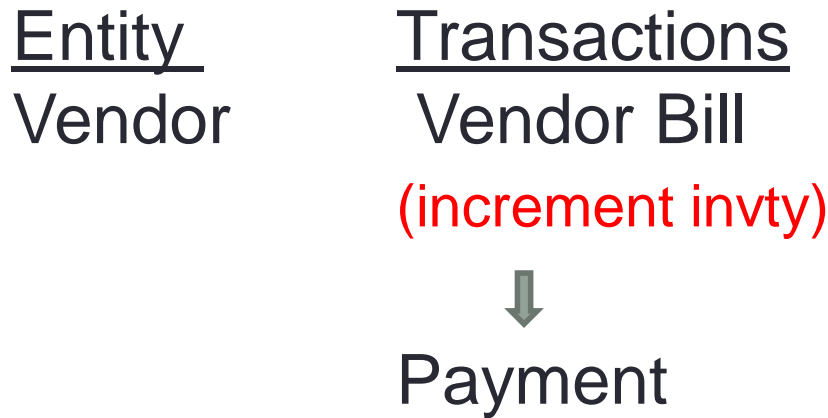
Payment

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



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

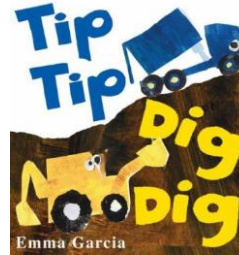
So Many Email Templates



- **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

Now Let's Dig In



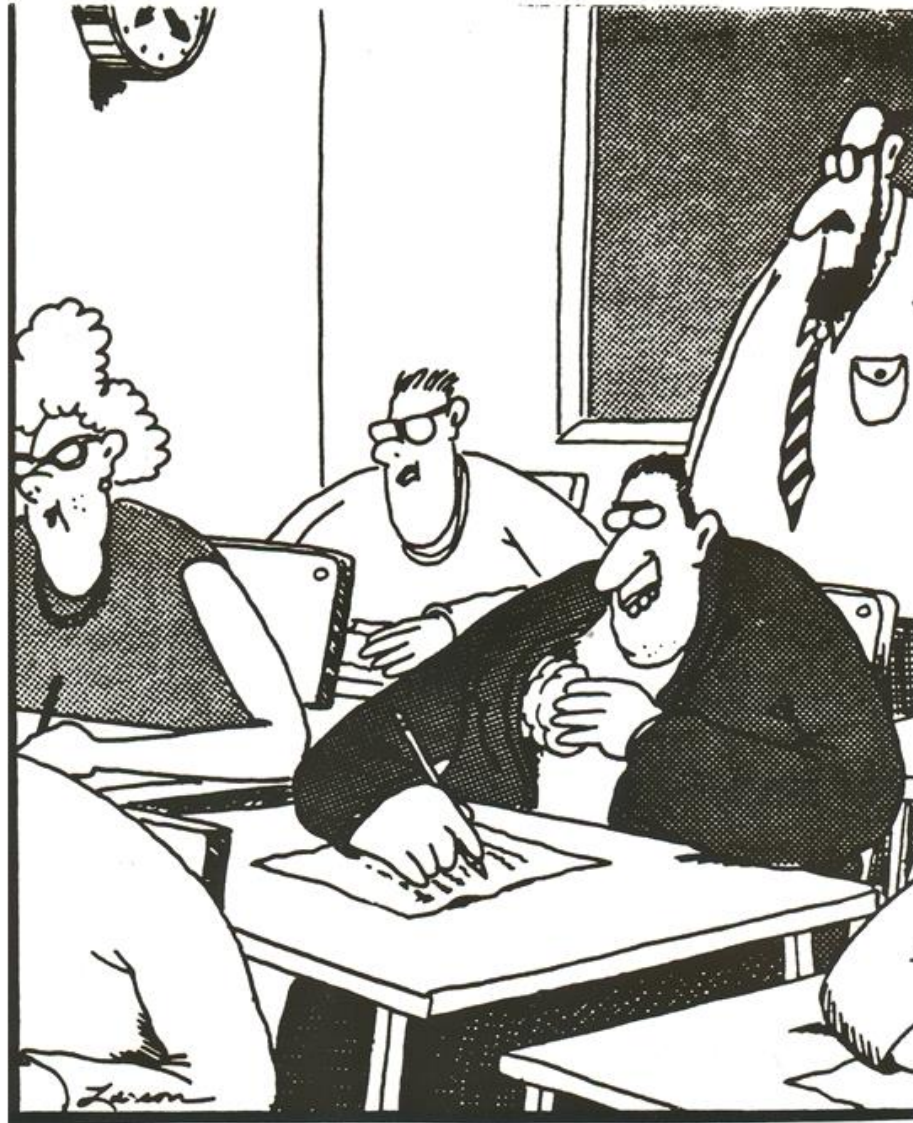
- Home Page
 - Personalize your home page
 - 5 ways to add shortcuts
 - Set personal preferences
- Global Search
- NetSuite Reporting – Which do I use ?
 - Report
 - Saved Searches
- Getting Data In/Out and Updated



But before we do.....

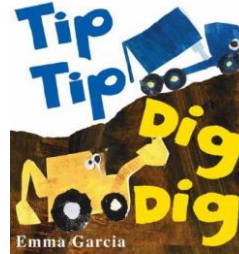
Break Time

20 minutes



MIDWAY THROUGH THE PRESENTATION
BILL PULLS OUT A BIGGER BRAIN.

Now Let's Dig In

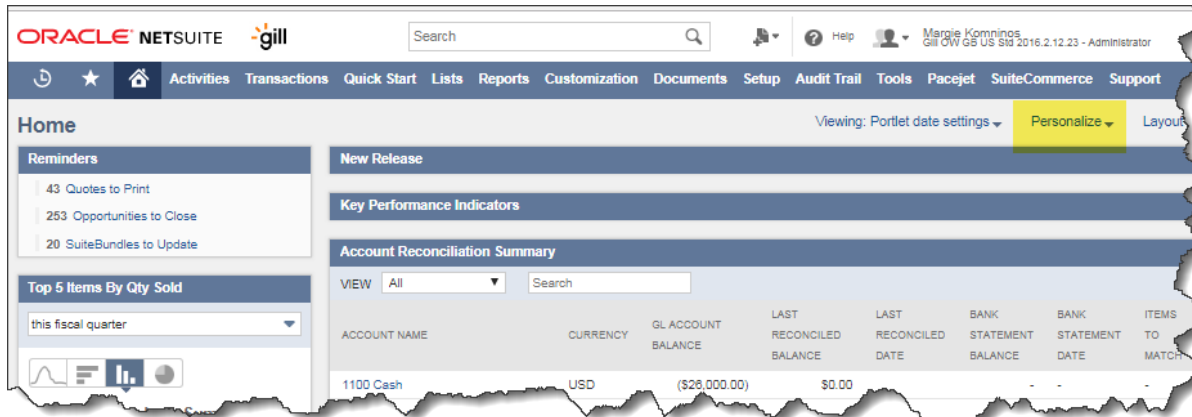


- Home Page
 - Personalize your home page
 - 5 ways to add shortcuts
 - Set personal preferences
- Global Search
- NetSuite Reporting – Which do I use ?
 - Report
 - Saved Searches
- Getting Data In/Out and Updated

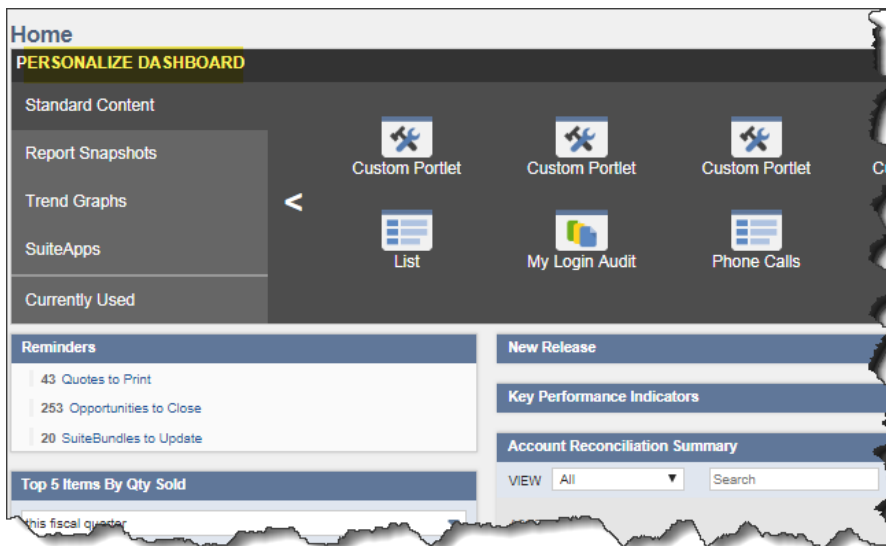


Home Page > Personalize

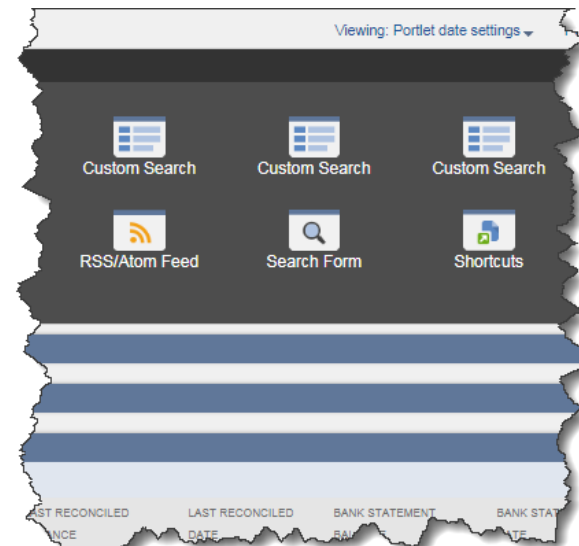
Setting up a dashboard



The screenshot shows the Oracle NetSuite Home page. The top navigation bar includes links for Activities, Transactions, Quick Start, Lists, Reports, Customization, Documents, Setup, Audit Trail, Tools, Pacejet, SuiteCommerce, and Support. The user is logged in as Margie Komminos. The 'Personalize' button is highlighted in the top right corner. The main content area shows various widgets like Reminders, Top 5 Items By Qty Sold, New Release, Key Performance Indicators, and Account Reconciliation Summary.



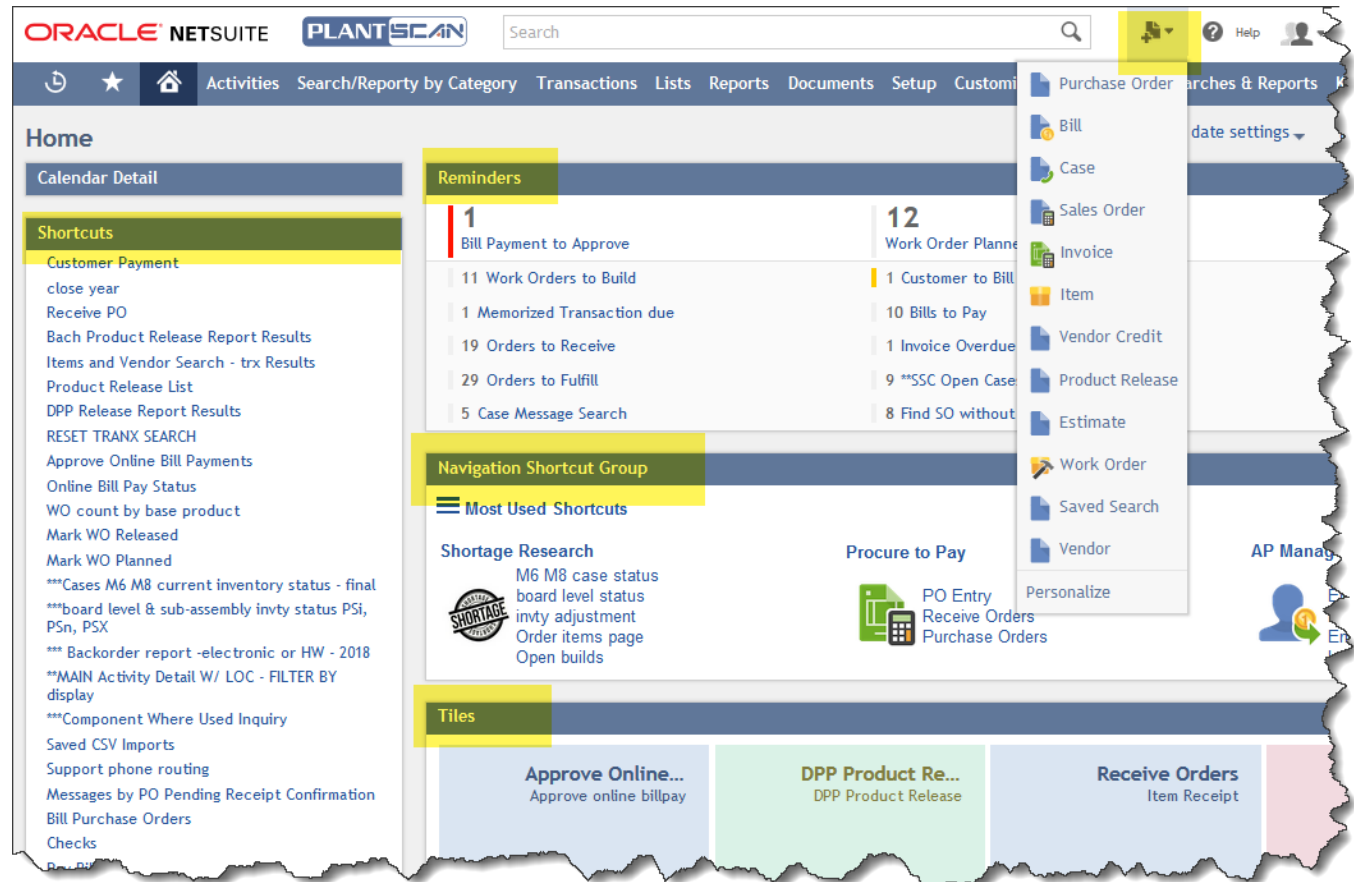
The screenshot shows the personalized dashboard. The left sidebar contains a 'PERSONALIZE DASHBOARD' section with options for Standard Content, Report Snapshots, Trend Graphs, SuiteApps, and Currently Used. The main content area displays several custom portlets: Custom Portlet, Custom Portlet, Custom Portlet, List, My Login Audit, and Phone Calls. Below these are the same standard widgets as in the top screenshot: Reminders, Top 5 Items By Qty Sold, New Release, Key Performance Indicators, and Account Reconciliation Summary.



The screenshot shows another view of the personalized dashboard. The top right corner indicates 'Viewing: Portlet date settings'. The main content area displays a different set of custom portlets: Custom Search, Custom Search, Custom Search, RSS/Atom Feed, Search Form, and Shortcuts. Below these are the same standard widgets as in the top screenshot: Reminders, Top 5 Items By Qty Sold, New Release, Key Performance Indicators, and Account Reconciliation Summary.

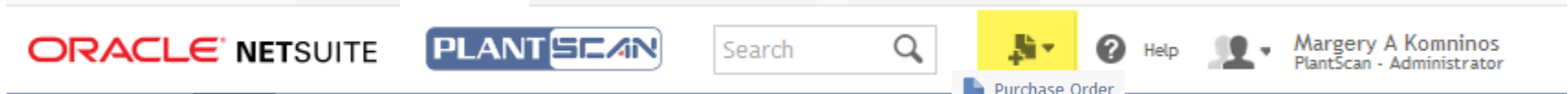
Home Page > 5 Types of Shortcuts

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



Home Page > 5 Types of Shortcuts












1 - Menu Bar -

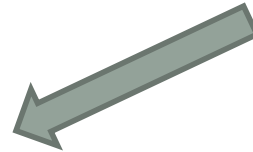


Accessed from any page

New Bar Set Up

[Save](#) [Cancel](#) [Reset](#)

Move To Top		Move To Bottom
INCLUDE	LINK	
	<input checked="" type="checkbox"/> Event	
	<input checked="" type="checkbox"/> Phone Call	
	<input checked="" type="checkbox"/> Task	
	<input checked="" type="checkbox"/> Lead	
	<input checked="" type="checkbox"/> Client	
	<input checked="" type="checkbox"/> Contact	
	<input checked="" type="checkbox"/> Opportunity	
	<input checked="" type="checkbox"/> Sales Order	
	<input type="checkbox"/> Activity	
	<input type="checkbox"/> Cash Sale	
	<input type="checkbox"/> Defect (Bugs)	

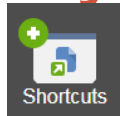


Purchase Order
Bill
Case
Sales Order
Invoice
Item
Vendor Credit
Product Release
Estimate
Work Order
Saved Search
Vendor
Personalize

- 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



ORACLE NETSUITE

Search

Activities Transactions Lists Reports Customization

Transactions

New Customer

RSVP search

RSVP monthly sign-in form

Current Process Flows

Potential meeting sponsors

BOD Documents

Cases

Tasks

Calendar

Members

Find Members by Company Name Results

Open Invoices with Company Name

Campaign Bounced Emails - summary Results

Logos

NS phone routing menu

Set Up Shortcuts

Transaction Search

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

Add shortcuts via “Setup Shortcuts”

Set Up Shortcuts

Save Cancel Reset

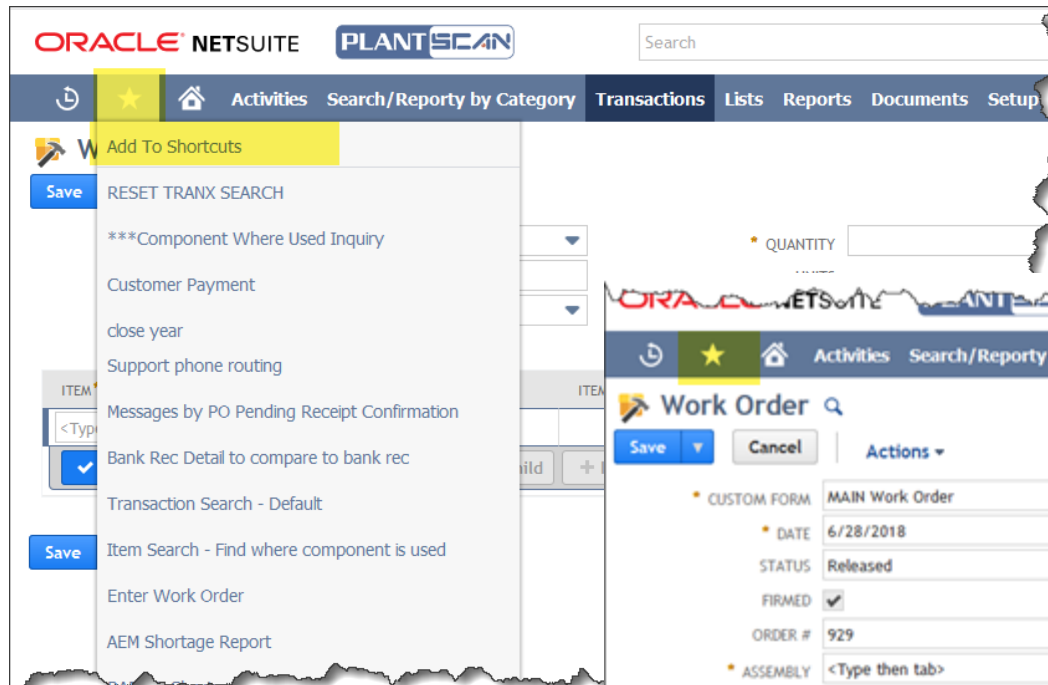
Move To Top Move To Bottom

	ENABLE	LABEL	EXTERNAL URL	OPEN NEW WINDOW
::	<input checked="" type="checkbox"/>	New Customer		<input checked="" type="checkbox"/>
::	<input checked="" type="checkbox"/>	RSVP search		<input checked="" type="checkbox"/>
::	<input checked="" type="checkbox"/>	RSVP monthly sign-in form		<input type="checkbox"/>
::	<input checked="" type="checkbox"/>	Current Process Flows	https://system.na2.netsuite.com/app/common/media/mediaiter	<input checked="" type="checkbox"/>
::	<input checked="" type="checkbox"/>	Potential meeting sponsors		<input type="checkbox"/>
::	<input checked="" type="checkbox"/>	BOD Documents	https://system.na2.netsuite.com/app/common/media/mediaiter	<input checked="" type="checkbox"/>
::	<input checked="" type="checkbox"/>	Campaign Bounced Emails - summ		<input checked="" type="checkbox"/>
::	<input checked="" type="checkbox"/>	Logos	https://system.na2.netsuite.com/app/common/media/mediaiter	<input checked="" type="checkbox"/>
::	<input checked="" type="checkbox"/>	NS phone routing menu	https://system.netsuite.com/core/media/media.nl?id=13727838	<input checked="" type="checkbox"/>

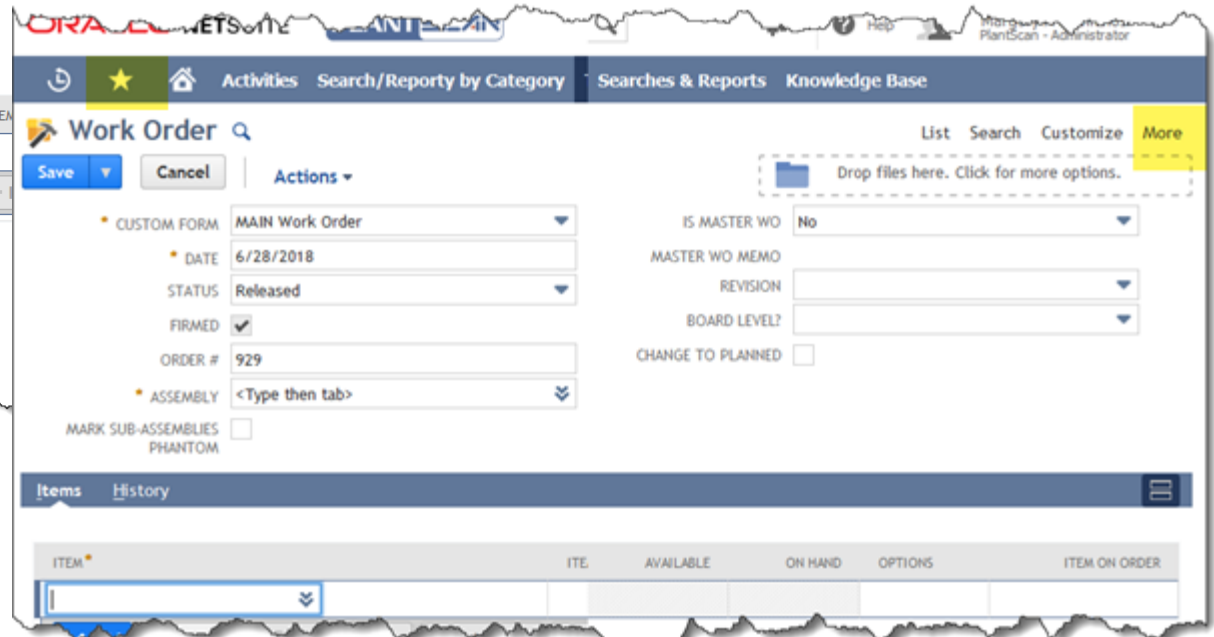
Cancel Reset

Home Page > 5 Types of Shortcuts

2- Shortcuts Portlet



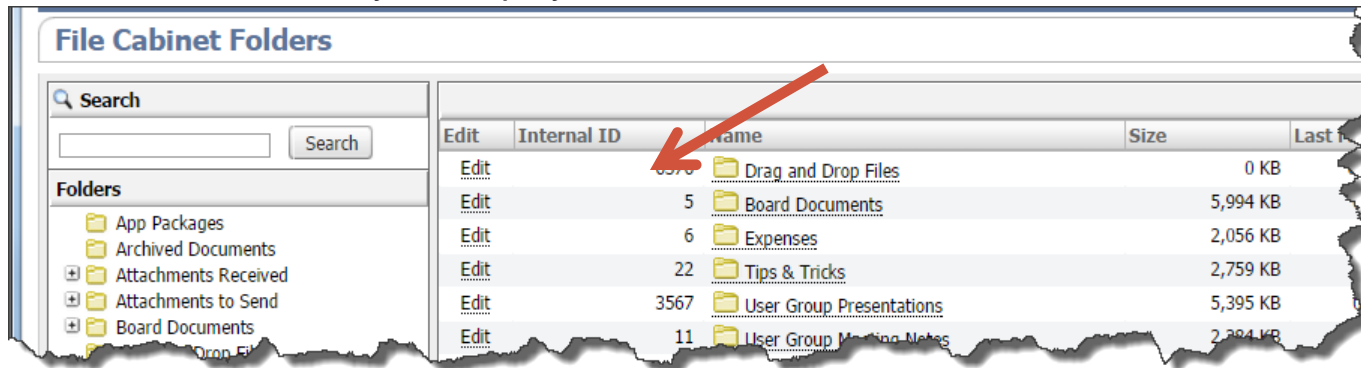
- Add from shortcuts portlet
- Add from More link
- Add from ★



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

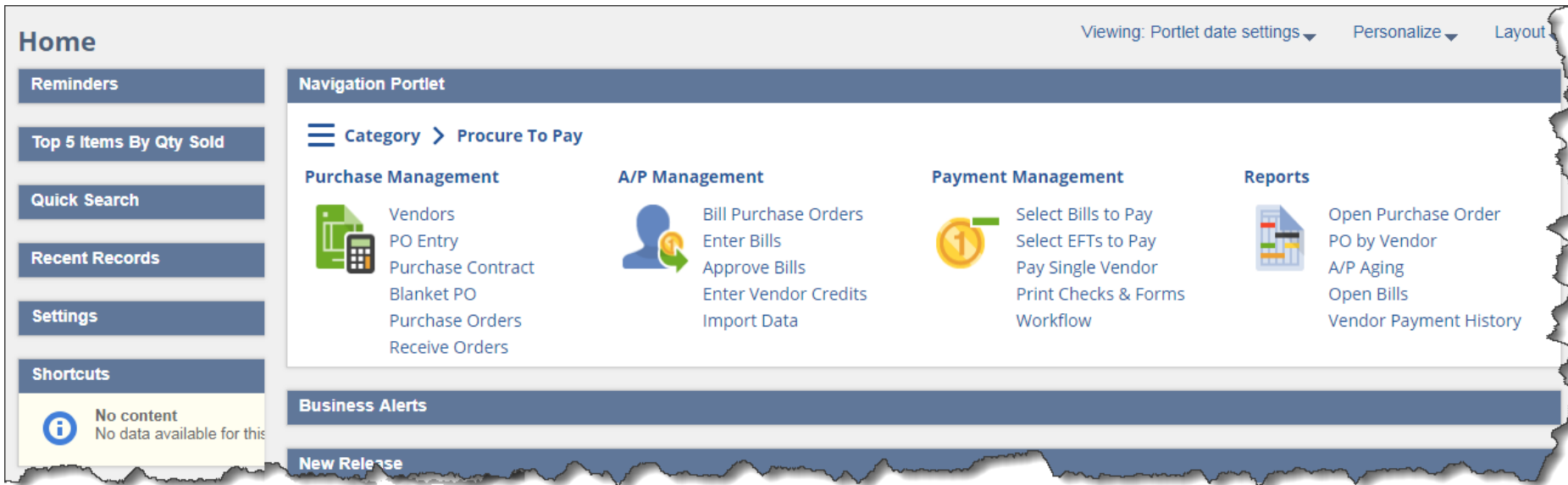
The 'Add Shortcut' dialog box has the following fields and controls:

- Buttons:** Save, Cancel, Reset
- NAME:** Current Process Flows
- URL:** uite.com/app/common/media/mediaitemfolders.nl?folder=10478
- OPEN IN NEW WINDOW:** ☒

Home Page > 5 Types of Shortcuts

■ 3 - Navigation Portlet

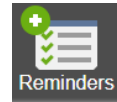
- Simplifies navigation to commonly used menus in NetSuite by category.
- Free SuiteApp (bundle by NS) – Install bundle 186103; SuiteAnswers 65731
- Use Custom Portlet to display
- Great way to organize shortcuts
- Can only view on Home Page
- Images not included – zip file loaded on member page of www.rmnsug.org



The screenshot displays the NetSuite Home page interface. On the left is a sidebar with navigation links: Home, Reminders, Top 5 Items By Qty Sold, Quick Search, Recent Records, Settings, and Shortcuts. The main content area features a 'Navigation Portlet' with a 'Category > Procure To Pay' filter. This portlet is divided into four columns: 'Purchase Management' (listing Vendors, PO Entry, Purchase Contract, Blanket PO, Purchase Orders, and Receive Orders), 'A/P Management' (listing Bill Purchase Orders, Enter Bills, Approve Bills, Enter Vendor Credits, and Import Data), 'Payment Management' (listing Select Bills to Pay, Select EFTs to Pay, Pay Single Vendor, Print Checks & Forms, and Workflow), and 'Reports' (listing Open Purchase Order, PO by Vendor, A/P Aging, Open Bills, and Vendor Payment History). Below the portlet are sections for 'Business Alerts' and 'New Release'. The top right of the page includes links for 'Viewing: Portlet date settings', 'Personalize', and 'Layout'.

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

The screenshot displays the NetSuite Home page interface. The top navigation bar includes tabs for Activities, Search/Report by Category, Transactions, Lists, Reports, Documents, Setup, Customization, Support, Searches & Reports, and Knowledge Base. The main content area is titled 'Home' and features a 'Viewing: Portlet date settings' dropdown. The page is organized into several sections:

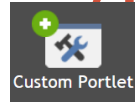
- Navigation Shortcut Group:** Includes a 'Shortage Research Category' section with a 'Shortage Research' icon and links to 'M6 M8 case status', 'board level status', 'BO report', 'Order items page', and 'Open builds'.
- Calendar Detail:** A section for viewing calendar details.
- Shortcuts:** A sidebar on the left listing various shortcuts like 'Customer Payment', 'close year', 'Receive PO', 'Batch Product Release Request', 'Items and Vendor Search', 'Product Release List', 'DPP Release Report Results', and 'RESET TRUNK SEARCH'.
- Reminders Portlet:** A central section titled 'Reminders' showing a grid of reminders. The grid includes a total count of 12 and a list of reminders with their respective counts and descriptions. The reminders are color-coded based on their count: yellow for 0, green for 12, and red for 2.
- Tiles:** A bottom section with three tiles: 'Approve Online Billpay', 'DPP Product Release', and 'Upcoming Orders - by WO'.

The Reminders portlet data is as follows:

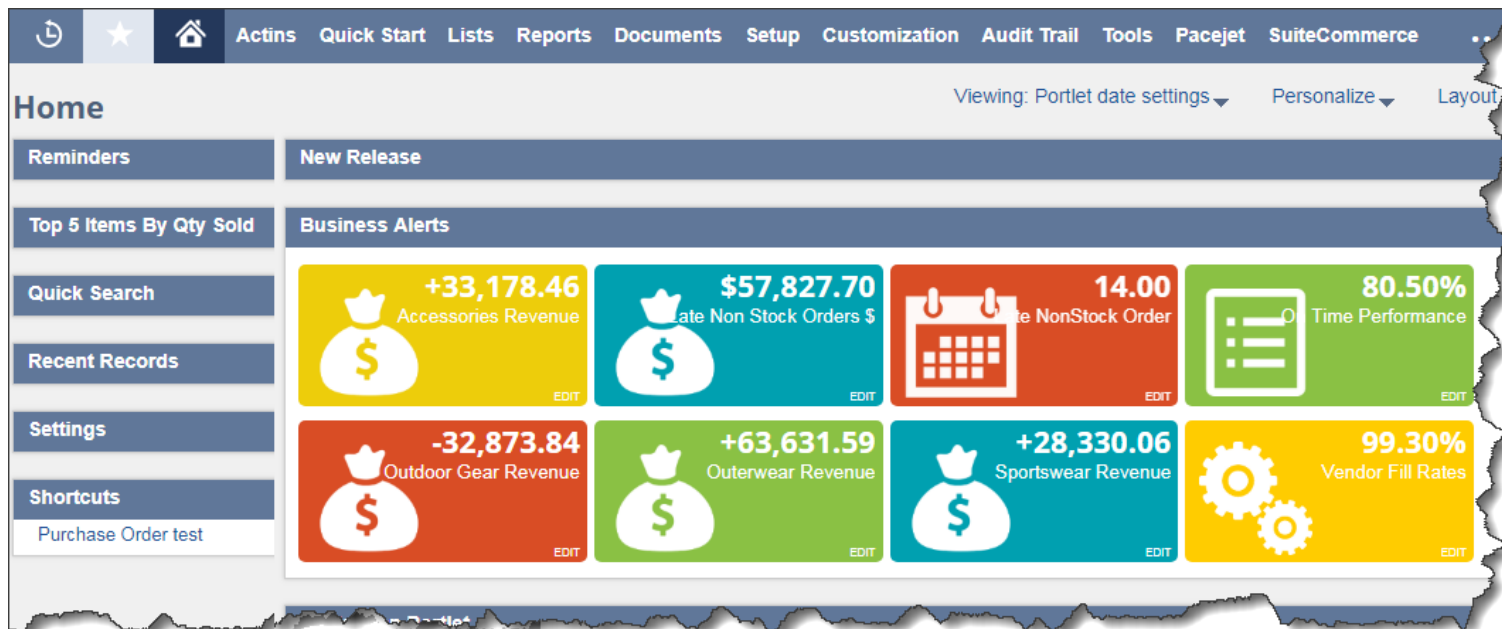
Count	Reminder Description
0	ALERT: Find POs to be shipped to RAD in ERROR
0	Alert - Find Missing Release Dates
0	Sales Orders to Approve
0	Sales Orders to Invoice
0	Purchase Orders to Bill
0	Bill Payments to Approve
0	SSC Change Release Date Request
12	Work Order Planned - monthly search
9	Work Orders to Build
1	Customer to Bill
2	Memorized Transactions due
5	Bills to Pay
0	Customers to Renew
0	Credit Cards to Approve

Home Page > 5 Types of Shortcuts

5 - Dashboard Tiles

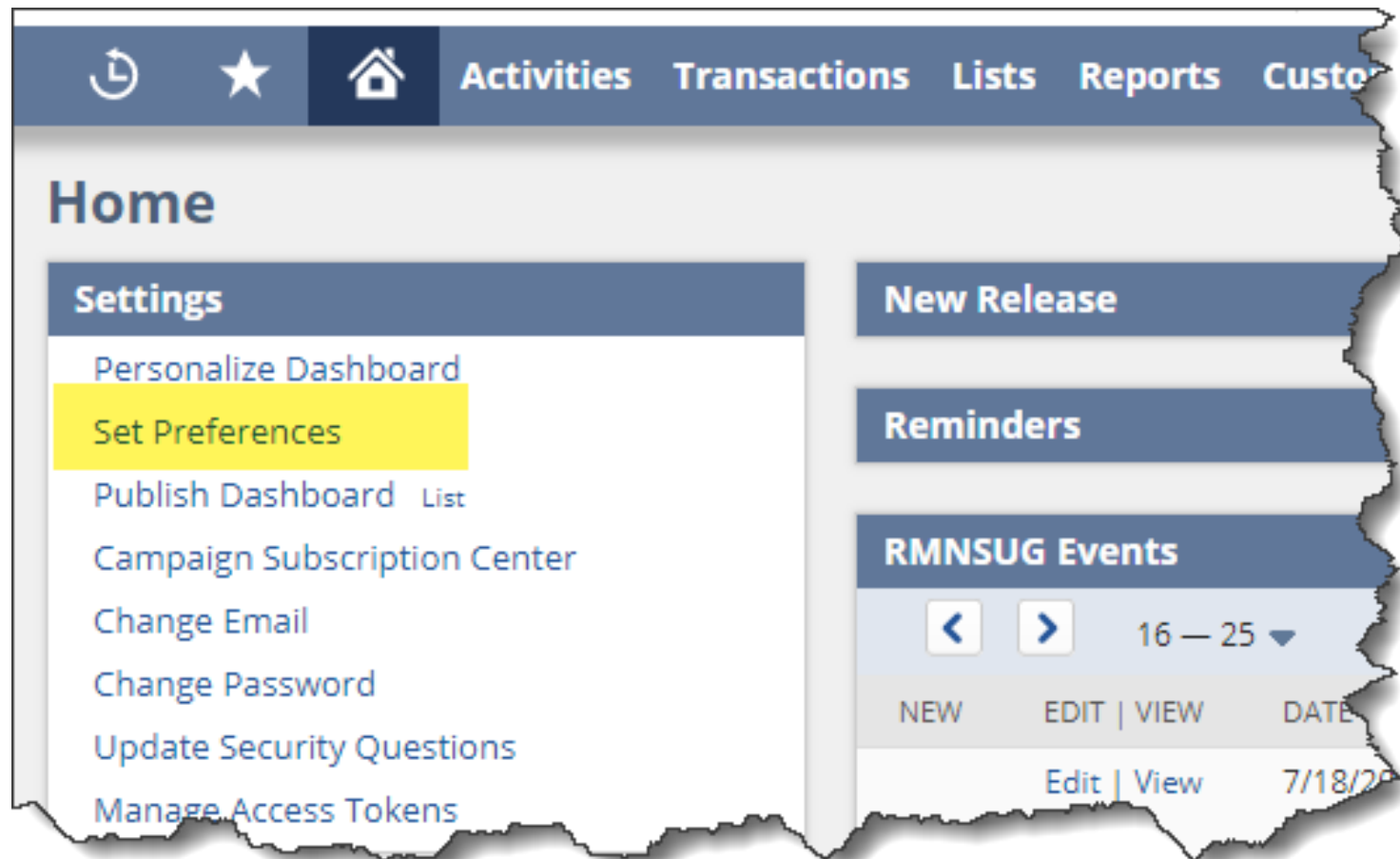


- Display business critical KPIs in a bold visual layout with images and blinking alerts.
- Free SuiteApp (bundle by NS) – Install bundle 185219, SuiteAnswers 65560
- Images not included
- Use Custom Portlet to display
- Can only view on Home Page



Home > Set Preferences

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



Home > Set Preferences

General Tab

The screenshot shows the 'Set Preferences' page with the 'General' tab selected. The page is divided into several sections: 'User Profile', 'Defaults', 'Messages', and 'Optimizing NetSuite'. Annotations with red arrows point to specific settings:

- From email address used to send/reply to emails. If not entered will use your login email:** Points to the 'FROM EMAIL ADDRESS' field, which contains 'CustService@plantscan.com'.
- For faster page loads, delay loading of subtabs:** Points to the 'DELAY LOADING OF SUBLISTS' checkbox, which is checked.
- For faster loading make the segments smaller:** Points to the 'NUMBER OF ROWS IN LIST SEGMENTS' field, which is set to '100'.

Set Preferences

General | Appearance | Transactions | Analytics | Activities

User Profile

NICKNAME: PlantScan Support
This setting applies to all your roles.

FROM EMAIL ADDRESS: CustService@plantscan.com
This setting applies to all your roles.

SIGNATURE: Margery Komninos
Customer Service
PlantScan, Inc.
www.plantscan.com
This setting applies to all your roles.

ADD SIGNATURE TO MESSAGES: ☐

Defaults

DOWNLOAD PDF FILES: ☐

ADDRESS MAPPING TYPE: Google

SHOW INTERNAL IDS: ☒

ONLY SHOW LAST SUBACCOUNT: ☒

ONLY SHOW LAST SUBENTITY: ☒

ONLY SHOW LAST SUBITEM: ☒

Messages

SUBMIT WARNINGS: ☒

LIMIT CC FIELD TO CONTACTS & EMPLOYEES: ☐

Optimizing NetSuite

DELAY LOADING OF SUBLISTS: ☒

* NUMBER OF ROWS IN LIST SEGMENTS: 100

* MAXIMUM ENTRIES IN DROPDOWNS: 10

TYPE-AHEAD ON LIST FIELDS: ☒

Localization

LANGUAGE: English (U.S.)
This setting applies to all your roles.

SEARCH SORTING: Language Specific
This setting applies to all your roles.

LANGUAGE OF THE HELP CENTER: English (U.S.)

PDF LANGUAGE:

TIME ZONE: (GMT-07:00) Mountain Time (US & Canada)
This setting applies to all your roles.

FIRST DAY OF WEEK: Sunday

Buttons: Save, Cancel, Reset

Home > Set Preferences

General Tab > Show Internal ID



What's an External ID

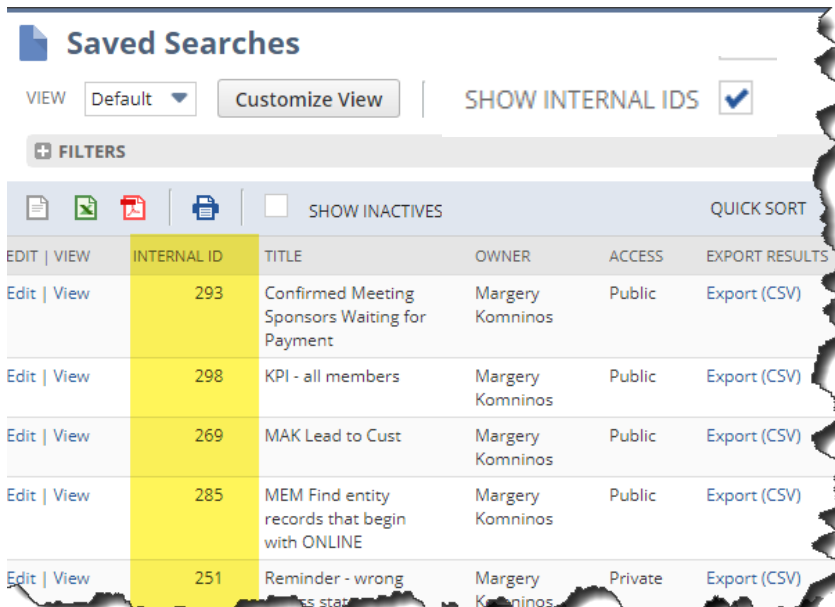
Show Internal ID = ☒

- 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

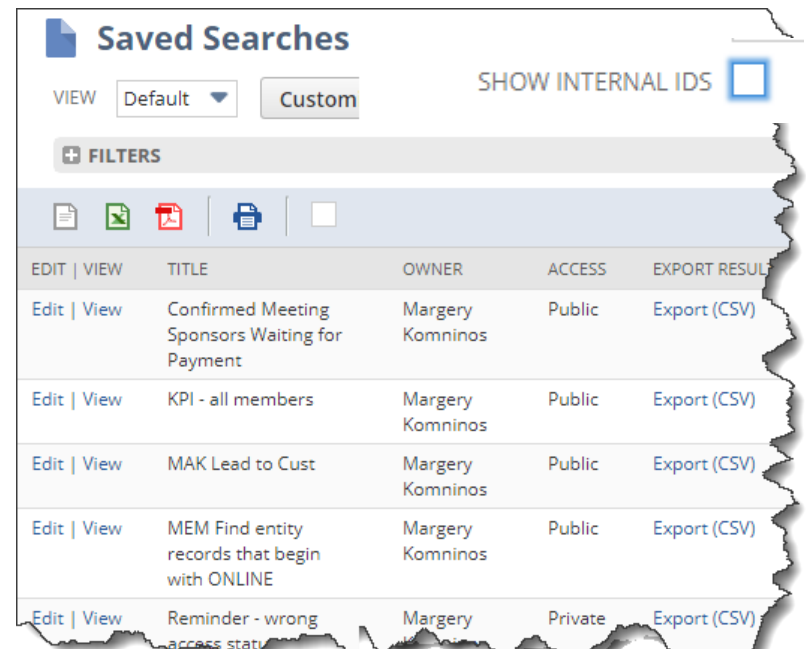
TIP: Alternative for Chrome – install plugin 'NetSuite: Show Field IDs'

- 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



Saved Searches					
VIEW		Default	Customize View	SHOW INTERNAL IDS <input checked="" type="checkbox"/>	
+ FILTERS					
		SHOW INACTIVES	QUICK SORT		
EDIT VIEW	INTERNAL ID	TITLE	OWNER	ACCESS	EXPORT RESULTS
Edit View	293	Confirmed Meeting Sponsors Waiting for Payment	Margery Komninos	Public	Export (CSV)
Edit View	298	KPI - all members	Margery Komninos	Public	Export (CSV)
Edit View	269	MAK Lead to Cust	Margery Komninos	Public	Export (CSV)
Edit View	285	MEM Find entity records that begin with ONLINE	Margery Komninos	Public	Export (CSV)
Edit View	251	Reminder - wrong	Margery Komninos	Private	Export (CSV)

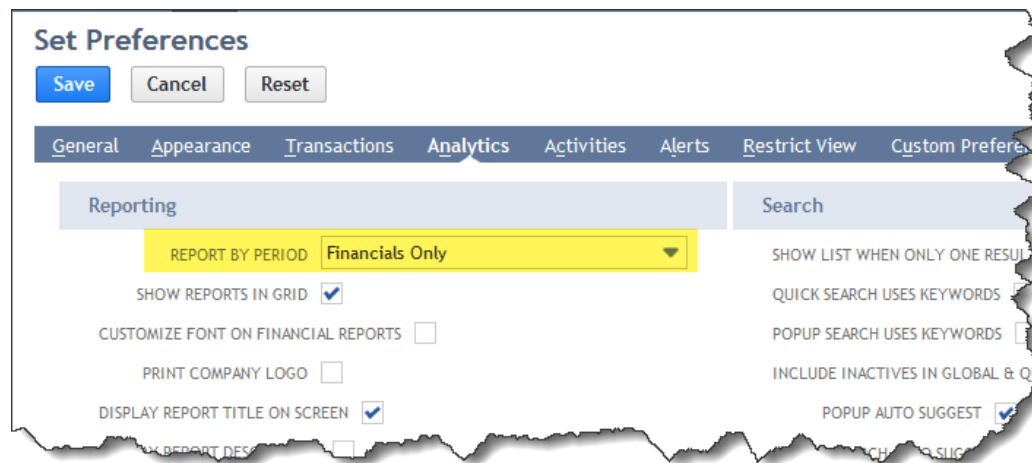


Saved Searches				
VIEW		Default	Custom	SHOW INTERNAL IDS <input type="checkbox"/>
+ FILTERS				
		SHOW INACTIVES	QUICK SORT	
EDIT VIEW	TITLE	OWNER	ACCESS	EXPORT RESULTS
Edit View	Confirmed Meeting Sponsors Waiting for Payment	Margery Komninos	Public	Export (CSV)
Edit View	KPI - all members	Margery Komninos	Public	Export (CSV)
Edit View	MAK Lead to Cust	Margery Komninos	Public	Export (CSV)
Edit View	MEM Find entity records that begin with ONLINE	Margery Komninos	Public	Export (CSV)
Edit View	Reminder - wrong	Margery Komninos	Private	Export (CSV)

Home > Set Preferences

Analytics Tab > Report by Period

See HELP: 'Report by Period: Financials Only Reports'



The screenshot shows the 'Set Preferences' dialog box with the 'Analytics' tab selected. The 'Reporting' section is active, showing a dropdown menu for 'REPORT BY PERIOD' set to 'Financials Only'. Other options include 'SHOW REPORTS IN GRID' (checked), 'CUSTOMIZE FONT ON FINANCIAL REPORTS' (unchecked), 'PRINT COMPANY LOGO' (unchecked), and 'DISPLAY REPORT TITLE ON SCREEN' (checked). The 'Search' section on the right includes options like 'SHOW LIST WHEN ONLY ONE RESULT' (checked), 'QUICK SEARCH USES KEYWORDS' (checked), 'POPUP SEARCH USES KEYWORDS' (checked), 'INCLUDE INACTIVES IN GLOBAL & Q' (checked), and 'POPUP AUTO SUGGEST' (checked).

- 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

i:front panel

Inventory Item: RM MP : Front Panel Laser Port 67-0000-0139

Inventory Item: RM MP : Front Panel PSn 67-1000-0140

Inventory Item: RM MP : Front Panel, MX Case (GN) 67-0002-0000

Search

SHOW LIST WHEN ONLY ONE RESULT ☒

QUICK SEARCH USES KEYWORDS ☒

POPUP SEARCH USES KEYWORDS ☐

INCLUDE INACTIVES IN GLOBAL & QUICK SEARCH ☐

POPUP AUTO SUGGEST ☒

GLOBAL SEARCH AUTO SUGGEST ☒

GLOBAL SEARCH SORT BY NAME/ID ☒

GLOBAL SEARCH CUSTOMER PREFIX INCLUDES LEADS AND PROSPECTS ☐

Example with + sign

i:front panel+

Inventory Item: RM MP : Front Panel 67-1000-0900

Inventory Item: RM MP : Front Panel Laser Port 67-0000-0139

Inventory Item: RM MP : Front Panel PSn 67-1000-0140

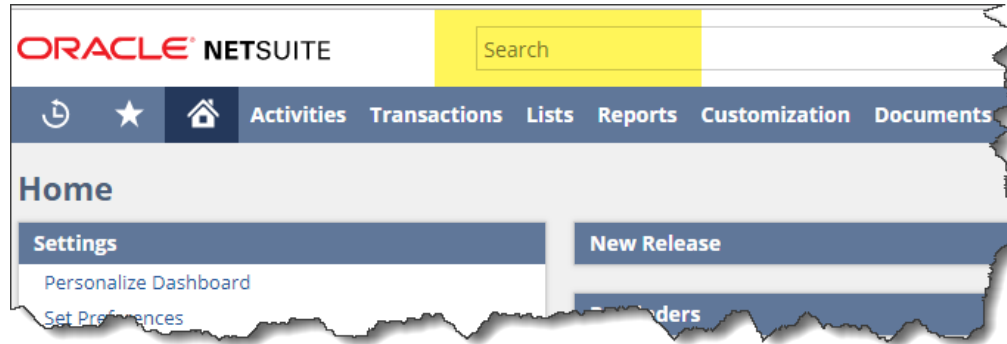
Inventory Item: RM MP : Front Panel, MX Case (GN) 67-0002-0000

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.

GLOBAL SEARCH CUSTOMER PREFIX INCLUDES LEADS AND PROSPECTS



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.

The screenshot shows a software interface with a search bar at the top left containing the text "cu: house". Below the search bar, a dropdown menu displays two suggestions: "Customer: House of Fraser" and "Customer: House Of Ing". A green arrow points from the second suggestion to the "Customer Dashboard" for "House Of Ing".

The "Customer Dashboard" for "House Of Ing" is displayed, showing various sections:

- Customer (default)**: A list of customer details including Type, Company Name, Status, Sales Rep, Partner, Web Address, Email, Phone, Address, and Map. It also includes a "View" button and an "Edit" button.
- Key Performance Indicators**: A table showing various indicators and their values.
- Customer Dashboard Links**: A section with links to various reports and transactions.
- Transactions**: A table showing transaction details.

The "Key Performance Indicators" table is as follows:

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Sales	This Fiscal Year vs. Last Fiscal Year	(\$312)	\$84,336	+ 100.4%
Forecast	This Fiscal Year vs. Last Fiscal Year	(\$312)	\$84,336	+ 100.4%
Total Pipeline (Projected)	End of This Fiscal Year vs. End of Last Fiscal Year	\$0	\$0	0.0%
Balance	Today vs. Same Day Last Month	(\$13)	(\$13)	0.0%
Unbilled Orders	Today vs. Same Day Last Month	\$0	\$0	0.0%
Overdue Balance	Current	\$0		
Days Overdue	Current	0		
Average Days to Pay	Previous One Year vs. One Year Before Last	31	0	+ N/A
Average Days Overdue	Previous One Year vs. One Year Before Last	0	0	0.0%
New Cases	This Fiscal Year vs. Last Fiscal Year	2	0	+ N/A
Open Cases	End of This Fiscal Year vs. End of Last Fiscal Year	2	0	+ N/A
Cases Closed	This Fiscal Year vs. Last Fiscal Year	0	0	0.0%
Cases Escalated	This Fiscal Year vs. Last Fiscal Year	0	0	0.0%

The "Customer Dashboard Links" section includes links to Sales Reports, Financial Reports, and Transactions.

The "Transactions" table is as follows:

DATE	TYPE	DOCUMENT NUMBER	TRANSACTION NUMBER	NAME	PO/CHECK NUMBER
12/10/2015	Cash Sale	1411	1411	House Of Ing	
3/5/2016	Cash Sale	1484	1484	House Of Ing	
5/31/2016	Cash Sale	1553	1553	House Of Ing	

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 your 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						
Acoeo Solutions	\$0.00	\$0.00	\$0.00	\$0.00	\$25,912.23	\$25,912.23
Aoe 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

DATE: AS OF: SUBSIDIARY CONTEXT: **Aging Options** Find...

AGING BASED ON ☐ TRANSACTION DATE ☒ DUE DATE

AGE AS OF

INTERVAL ☒ REGULAR ☐ IRREGULAR

BANDS EACH

Reports – Tips

Financial Report Builder

CUSTOM INCOME STATEMENT 3

☐ Edit Layout ☐ Edit Columns ☐ Filters ☐ Sorting (Optional) ☒ More Options

* NAME Custom Income Statement 3

Additional Options

Report Options

CASH BASIS ☒

SHOW ZEROS ☐

ACTIVITY ONLY ☒

SHOW ON REPORTS PAGE ☒

SHOW CURRENCY SYMBOL ☒

EXPAND LEVEL System Preference ▼

DRILL DOWN REPORT Income Statement Detail ▼

Audience

Select individual names or group names to give others access to your custom report. If you select both a role and a d

Audience **Access**

Select individual names or group names to give others access to your custom report. If you select both a role and a d

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.

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 initials.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

Saved Transaction Search List Search More

Alert - Find Missing Release Dates

Save & Run Reset Cancel Preview New Template Pivot Report Change ID Actions

SEARCH TITLE Alert - Find Missing Release Dates

ID customsearch697

OWNER Margery A Komninos

PUBLIC ☐

AVAILABLE AS LIST VIEW ☐

AVAILABLE AS DASHBOARD VIEW ☐

AVAILABLE AS SUBLIST VIEW ☐

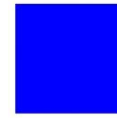
AVAILABLE FOR REMINDERS ☒

SHOW IN MENU ☐



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)



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

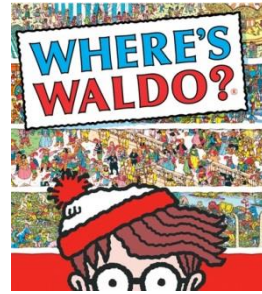
More Tips & Tricks



- 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

Tip – How to send to multiple emails

Cash Sale 🔍

46258

Save **Cancel** **Reset** **Actions** ▾

Primary Information

SALE # 46258	DATE * 6/27/2018	MEMO
CUSTOMER * Sarah Welwyn ▾	LOCATION Store #411 - Chiswick ▾	CREATED FROM Sales Order #UKR1410
SUBSIDIARY UK Retail	POSTING PERIOD * Jun 2018 ▾	CUSTOM FORM * GB - Cash Sales ▾

Summary

SUBTOTAL
DISCOUNT
TAX TOTAL

Items **Promotions** **Billing** **Accounting** **Relationships** **Communication** **System Information** **WMS** **Pagejet** **Tax Reporting** **Approver List**

Messages • **Events** **Tasks** **Phone Calls** **Files** **User Notes**

☐ TO BE PRINTED

☒ TO BE E-MAILED Roy@gmail.com;May@gmail

☐ TO BE FAXED

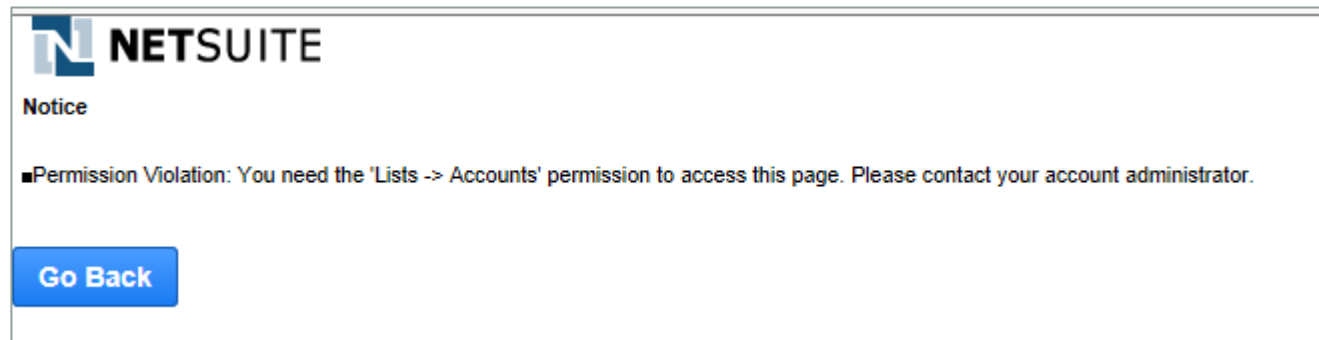
SELECT MESSAGE
▾

CUSTOMER MESSAGE
▾

- 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



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).

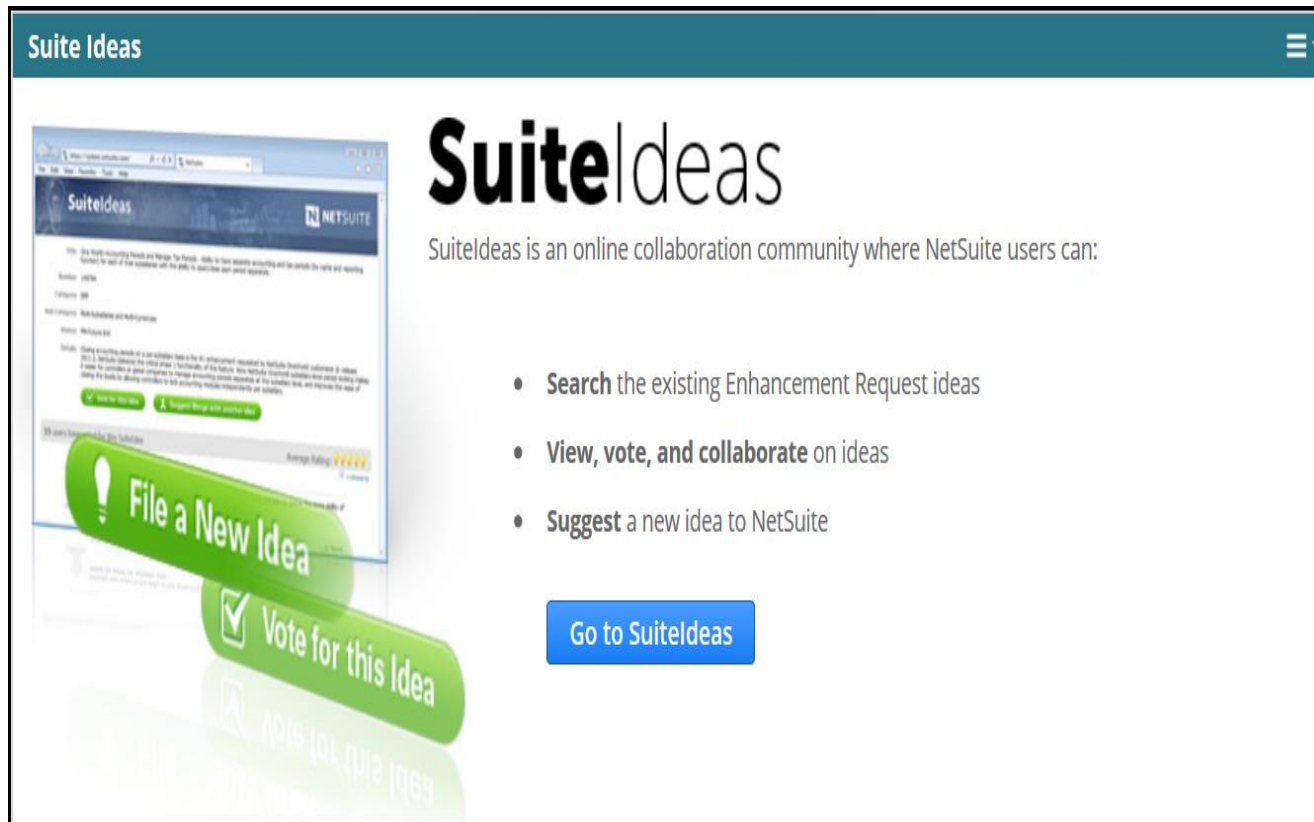
Navigating Subtabs: switch between tabs on forms.

- 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



SuiteIdeas

SuiteIdeas is an online collaboration community where NetSuite users can:

- **Search** the existing Enhancement Request ideas
- **View, vote, and collaborate** on ideas
- **Suggest** a new idea to NetSuite

[Go to 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.

SuiteIdeas **NETSUITE**

Search existing SuiteIdeas...

File a New Idea

Browse by Categories

- Basic Accounting
- Order to Cash
- Procure to Pay
- Supply Chain Management
- Advanced Accounting & OneWorld
- Manufacturing
- NetSuite SRP
- NetSuite Financial Planning
- Payroll
- sp;- Core HR
- Sales Force Automation
- Marketing
- Support Management
- SiteBuilder & Basic WebStore
- SuiteCommerce Advanced & Reference Implementa...
- SuiteCommerce Standard
- SuiteBuilder
- Scripting, SuiteTalk and SuiteBundler
- SuiteFlow
- ODBC
- NetSuite Performance

Welcome to the SuiteIdeas Community

SuiteIdeas is the NetSuite user community where NetSuite customers, employees, and SuiteApp vendors to improve the NetSuite product.

Top Ideas

Consolidated Billing> Ability to make a single invoice ou...	1378 votes
Ability to Merge Items Automatically.	653 votes
Accounts>Ability to edit an account's type and select any...	643 votes
The ability to store multiple e-mail addresses in an entity ...	591 votes
Provide ability to choose whether or not past transactions a...	573 votes

[More >](#)

New Ideas

Groups/Bulk Merge > Customer would like the ability to cr...	59 votes
Transactions > Management > Print Checks and Forms >...	23 votes
Reports > Footer filter: Provide ability to search for th...	36 votes
Setup > Users/Roles > Manage Roles > Customize Vend...	1 votes
Web Keyword report needs secondary dimension columns that ad...	4 votes

[More >](#)

Latest Updated Ideas

Lists>Relationships>Groups>New> Ability to creat...	6 votes
Dynamic Group > Saved Searches do not appear in the "Save...	2 votes
SuiteTax: Enable Hidden Feature for TSTDRV1609290	1 votes
Chart of Accounts > Create Account > Bank and Credit C...	1 votes
Custom segment field is not auto-populated when child record...	1 votes

[More >](#)

My Votes

Web Store>Shipping Method>> Shipping methods are l...

bill pay / paytrust: bill pay checkbox should appear on Tran...

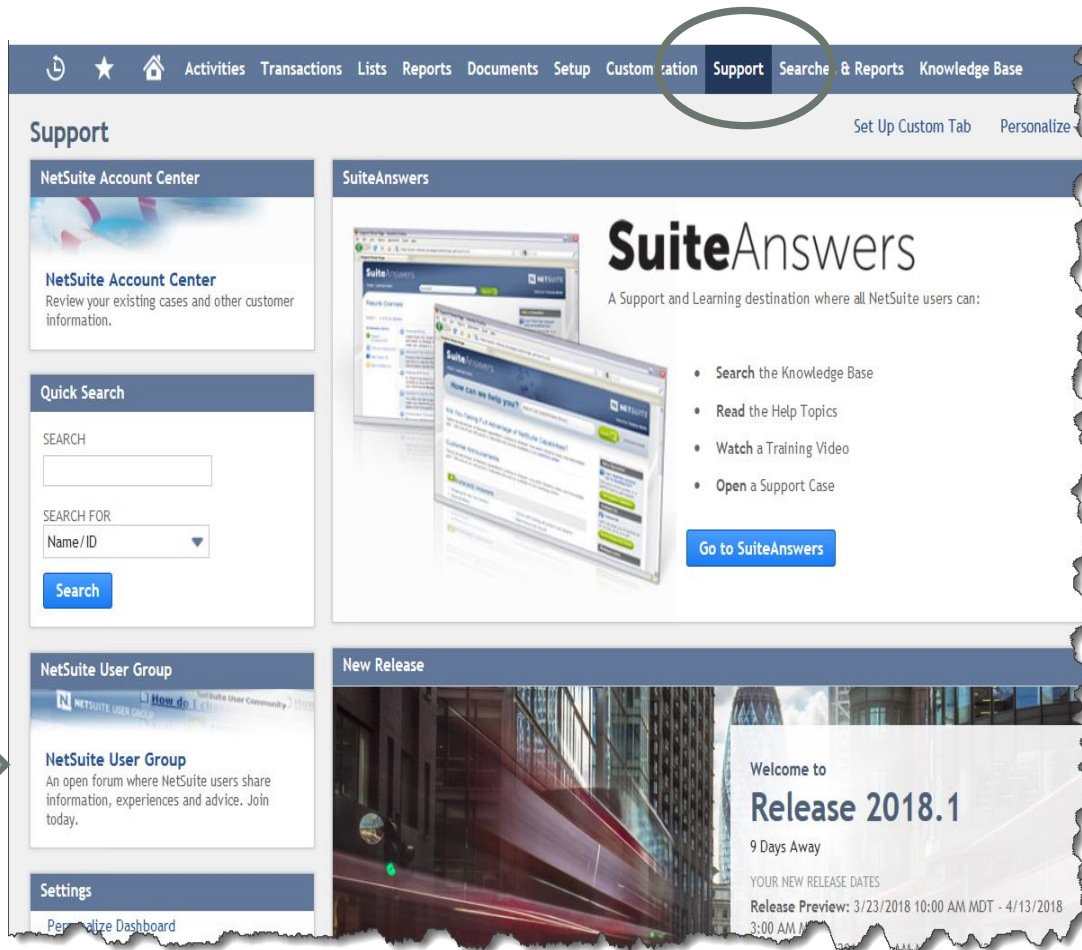
Online Bill Pay should have a way to choose the default for ...

Time Tracking - Employee Time Clock feature

Registers - set preference for f... w that lasts between...

Info

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

The screenshot displays the NetSuite User Group website with a blue header and a white background. The 'Product Areas' section is on the left, and the 'Platform Areas' section is on the right. The 'Product Areas' section includes a list of forums with their respective counts and descriptions. The 'Platform Areas' section includes a list of forums with their respective counts and descriptions. The 'Product Areas' section also includes a 'Sub-Forums' section with a list of forums and their counts. The 'Platform Areas' section also includes a 'Sub-Forums' section with a list of forums and their counts.

Product Areas

- Accounting / Transactions** 5,147 22,156 Item type for 3rd party consulting by Wikus 04-02-2018, 09:41 AM
Your forum to discuss accounting processes from a consolidated level down to the individual transactions.
- Supply Chain**
 - Sub-Forums:
 - AP / AR Trans (947/3,898)
 - Costing (1/1)
 - Planning (3/6)
- Fulfillment / S**
- Jobs / Project**

Platform Areas

- Customization** 11,083 49,564 Script deployment stops executing early... by starlingMark 04-03-2018, 02:20 PM
Discuss ways to customize NetSuite, whether you're extending NetSuite to fit your business needs or developing completely new applications.
- Sub-Forums:**
 - BFO / Advanced PDF and HTML Forms (157/681)
 - Custom Forms / Fields (1,529/6,233)
 - SuiteScript 2.0 / Custom Code (415/2,238)
 - Custom Records (329/1,416)
 - SuiteCloud IDE (78/445)
 - Searches / List Views (1,515/6,289)
 - SuiteScript 1.0 / Custom Code (4,705/22,058)
 - SuiteApps / SuiteBundler (113/430)
- Dashboard** 394 1,545 How to get Expenses/account to show i... by EmilyL@cortiva.edu 03-21-2018, 09:24 AM
Discuss ways to personalize your dashboard for an intuitive experience tailored to your unique needs.

- **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

NetSuite Profes... mkomninos

Jump to...

All Unreads

All Threads

Channels

- # accounting 2
- # administration
- # announcements 2
- # bundles 3
- # crm-sfa
- # general
- # jobs
- # performance 2
- # random
- # releases
- # request-a-channel
- # suiteanalytics 1
- # suitecommerce 3
- # suiteflow
- # suitescript 9+
- # suitetalkapi 1

#administration | 1,061 | 0 | Add a topic

samyt 5:47 AM
Is it possible to customize quick search portlet?

NordicTech 7:37 AM
 @samyt It looks like there are some Portlet-level settings and some User Preferences for Quick Search.

Setting Quick Search Preferences

Go to Home > Set Preferences, and click the Analytics subtab.

To include inactive records in searches, check the Include Inactives in Global Search checkbox.

If you want Quick Search to return records with names/IDs that start with the same characters as the search term, check the Match Start checkbox.

If you do not enable this preference, the Quick Search portlet includes Start with same characters as the search term. Enabling this preference will only return records that contain keywords, based on the option button selection. Enabling this preference will only return records that contain keywords, based on the option button selection.

Click Save. (edited)

NordicTech 7:38 AM
uploaded this image:

Quick Search Setup

Please choose your Quick Search criteria.

SEARCH TYPE
General

DEFAULT GENERAL SEARCH TYPE
<Type then tab>

DEFAULT TRANSACTION SEARCH TYPE
<Type then tab>

Online - LinkedIn Groups



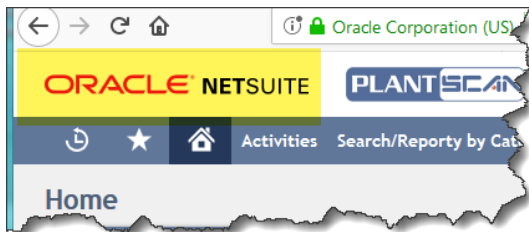
- **Official NetSuite Community Network** – 6K+ members
- Non-affiliated **NetSuite User Group** – 11K+ members
- Non-affiliated **NetSuite Users Group** – 5K members
- **Rocky Mountain NetSuite User Group Forum**
 - private for members only of the RMNSUG (local user group)

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

Manage Customer Duplicates

Duplicates

FILTERS

#	MASTER	DUPLICATE	NOT A DUP.	RESOLUTION STATUS	INTERNAL ID	NAME	SALES REP
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		933	ma Ko	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		943	Ma Ko 2	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		446	Te ne sup	
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		448	Te for	

Performance Details

Total	2.831
Server	1.719 (60.72%)
Server Suite Script	0 (0.00%)
Server Workflow	0 (0.00%)
Network	0.229 (8.09%)
Client	0.883 (31.19%)
Page	/app/common/entity/manageduplicates.nl
Email	mkomminos@plantscan.com
Time	7/11/2018 10:33 am GMT +6

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