

RMNSUG Tips & Tricks

May 2019

Changing your Login “Default” Role

- Click your username in upper-right corner
- Check the “Default Role” checkbox.
- Logout
- Login

The screenshot shows the Oracle NetSuite interface. In the top right corner, the user's name 'Mike Kachline' and role 'SB2 Vertafore, Inc. - Administrator' are displayed. The 'Choose Role' dialog box is open, showing a list of roles. The 'DEFAULT ROLE' checkbox is highlighted with a red box. The list of roles includes various roles for SB1, SB2, and SB4 Vertafore, Inc., with the 'Administrator' role for SB2 Vertafore, Inc. selected.

DEFAULT ROLE	ROLE	COMPANY	ACCOUNT
<input type="checkbox"/>	Administrator	SB1 Vertafore, Inc.	SAND
<input type="checkbox"/>	Vertafore A/P Manager	SB1 Vertafore, Inc.	SAND
<input type="checkbox"/>	Vertafore A/R Collector	SB1 Vertafore, Inc.	SAND
<input type="checkbox"/>	Vertafore A/R Manager	SB1 Vertafore, Inc.	SAND
<input type="checkbox"/>	Vertafore Revenue Recog Manager	SB1 Vertafore, Inc.	SAND
<input type="checkbox"/>	Administrator	SB2 Vertafore, Inc.	SAND
<input type="checkbox"/>	Developer	SB2 Vertafore, Inc.	SAND
<input type="checkbox"/>	Vertafore A/P Manager	SB2 Vertafore, Inc.	SAND
<input type="checkbox"/>	Vertafore A/R Collector	SB2 Vertafore, Inc.	SAND
<input type="checkbox"/>	Vertafore A/R Manager	SB2 Vertafore, Inc.	SAND
<input type="checkbox"/>	Vertafore Revenue Recog Manager	SB2 Vertafore, Inc.	SAND
<input checked="" type="checkbox"/>	Administrator	Vertafore, Inc.	PROD
<input type="checkbox"/>	Vertafore A/P Manager	Vertafore, Inc.	PROD
<input type="checkbox"/>	Vertafore A/R Collector	Vertafore, Inc.	PROD
<input type="checkbox"/>	Vertafore A/R Manager	Vertafore, Inc.	PROD
<input type="checkbox"/>	Vertafore Revenue Recog Manager	Vertafore, Inc.	PROD
<input type="checkbox"/>	Administrator	Vertafore, Inc SB3-Rev.Rec	SAND
<input type="checkbox"/>	Administrator	Vertafore, Inc SB4	SAND

“Must Have” Hot Keys

- Control-Click the House
- Alt-G

The screenshot shows the Oracle Netsuite interface with the following elements and annotations:

- Top Bar:** Includes the Oracle Netsuite logo, a "SANDBOX" label, the Vertafore logo, and a search bar.
- Navigation Menu:** A green bar with icons for Home, Activities, Payments, Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, Fixed Assets, AvidXchange, and Cash Application.
- Home Section:** Contains a "Vertafore Queue Portlet" table and a "Vertafore Scripts" section.
- Annotations:**
 - A red arrow points to the Home icon in the navigation menu with the text: "Hold the 'Control' key, click the house. Get a (fast) new browser tab in your Netsuite 'Home.'"
 - A red arrow points to the Search bar with the text: "Alt-G takes you here"
- Recent Script Errors Table:**

	Script ID	Title
ull,\"internalId\":\"null,\"code\" _SUBLIST_OPERATION\",\"data	CUSTOMSCRIPT_VTF_SS1_PREPPRJCHARGERULES	set
ull,\"internalId\":\"null,\"code	CUSTOMSCRIPT_VTF_SS1_PREPPRJCHARGERULES	NU SS
\"code\":\"NON-UNIQUE_SALESFORCE_ID_ON_PROJECT\",\"details\":\"The SALESFORCE ID is not unique.	CUSTOMSCRIPT_CELIGO_RT_IMPORT_REST	Cel
\"code\":\"INVALID KEY OR REP\",\"details\":\"Invalid		

Faster CSV Uploads

- “Use Multi-Threading”
- “Queue Number”
- “Run Server Suitescript and Trigger Workflows”

Import Assistant

STEPS

- 1 Scan & Upload CSV File
- 2 Import Options
- 3 File Mapping
- 4 Field Mapping
- 5 Save mapping & Start Import

Import Options

Data Handling

☒ ADD
☐ UPDATE
☐ ADD OR UPDATE

Select the appropriate option depending on whether you are importing new data or updating existing data.

Advanced Options

☐ LOG SYSTEM NOTES FOR CUSTOM FIELDS
Enable this option to create system notes during import of custom field data. Impacts performance; recommended only when custom fields require an audit trail.

☐ OVERWRITE MISSING FIELDS
For updates, enable this option to clear NetSuite fields mapped to CSV file fields that do not contain data.

☒ VALIDATE MANDATORY CUSTOM FIELDS
Enable this option to require mandatory custom field data to be present for records to be created.

☐ OVERWRITE SUBLISTS
For updates, enable this option to cause imported sublist data to completely replace existing sublist data, instead of selective updating or being appended. ... [more](#)

☒ IGNORE READ-ONLY FIELDS
This option, enabled by default, allows you to import CSV files containing values for read-only fields without causing errors.

CUSTOM MULTI-SELECT VALUE DELIMITER
Enter a single character to be used as a custom delimiter for multi-select fields, instead of the pipe (|).

CSV DECIMAL DELIMITER
Period
Select the symbol to be used as a decimal mark in the CSV files you import. This setting overrides the decimal mark preference specified at Home > See Preferences.

CUSTOM FORM
Vertafore Sales Order
By default, your preferred form determines NetSuite fields that can be mapped for importing. To vary these fields, select a different form.

☒ USE MULTI-THREADING
For updates, enable this option to cause imported data to be processed in parallel. For CSV file rows, check this box to optimize performance. When multiple threads are used, records may not be submitted in order.

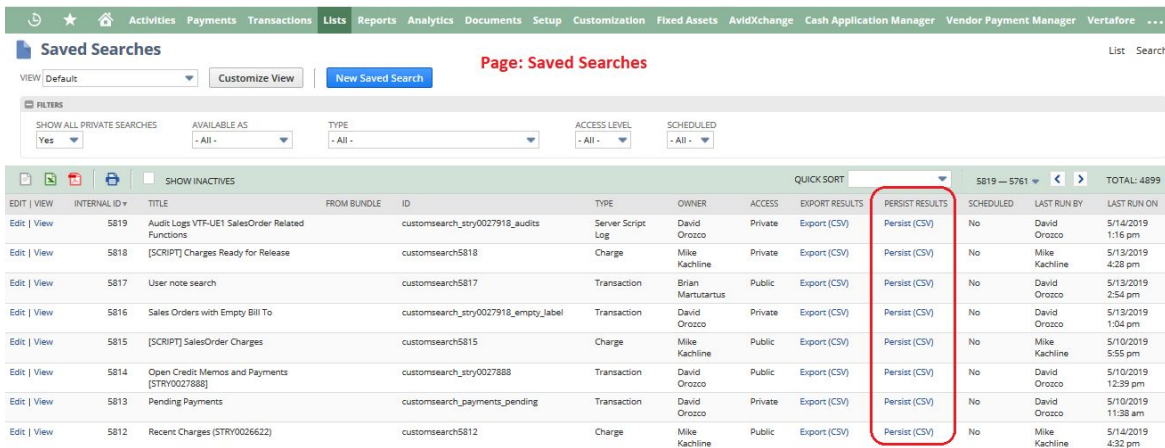
QUEUE NUMBER
3
Select an alternate queue (other than the default of 1) for this import job, to spread processing across multiple queues to improve performance.

☒ RUN SERVER SUITESCRIPT AND TRIGGER WORKFLOWS
Check to verify that any server-side suitescripts and workflows should be triggered for the current CSV import. Note that running server SuiteScript slows the save process. ... [more](#)

Cancel < Back Next >

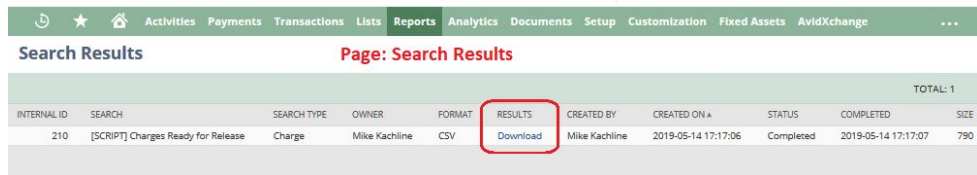
Export Timed-Out Searches to CSV

- Create Your Saved Search
- Page: Saved Searches
- Find your Search
- Click “Persist (CSV)”
- Wait
- Page: Search Results
- Click “Download”



Page: Saved Searches

EDIT VIEW	INTERNAL ID	TITLE	FROM BUNDLE	ID	TYPE	OWNER	ACCESS	EXPORT RESULTS	PERSIST RESULTS	SCHEDULED	LAST RUN BY	LAST RUN ON
Edit View	5819	Audit Logs VTF-UEI SalesOrder Related Functions		customsearch_sty0027918_audits	Server Script Log	David Orozco	Private	Export (CSV)	Persist (CSV)	No	David Orozco	5/14/2019 1:16 pm
Edit View	5818	[SCRIPT] Charges Ready for Release		customsearch5818	Charge	Mike Kachline	Private	Export (CSV)	Persist (CSV)	No	Mike Kachline	5/13/2019 4:28 pm
Edit View	5817	User note search		customsearch5817	Transaction	Brian Martuzartus	Public	Export (CSV)	Persist (CSV)	No	David Orozco	5/13/2019 2:54 pm
Edit View	5816	Sales Orders with Empty Bill To		customsearch_sty0027918_empty_label	Transaction	David Orozco	Private	Export (CSV)	Persist (CSV)	No	David Orozco	5/13/2019 1:04 pm
Edit View	5815	[SCRIPT] SalesOrder Charges		customsearch5815	Charge	Mike Kachline	Public	Export (CSV)	Persist (CSV)	No	Mike Kachline	5/10/2019 5:55 pm
Edit View	5814	Open Credit Memos and Payments [STRY0027888]		customsearch_sty0027888	Transaction	David Orozco	Public	Export (CSV)	Persist (CSV)	No	David Orozco	5/10/2019 12:39 pm
Edit View	5813	Pending Payments		customsearch_payments_pending	Transaction	David Orozco	Private	Export (CSV)	Persist (CSV)	No	David Orozco	5/10/2019 11:38 am
Edit View	5812	Recent Charges (STRY0026622)		customsearch5812	Charge	Mike Kachline	Public	Export (CSV)	Persist (CSV)	No	Mike Kachline	5/14/2019 4:32 pm

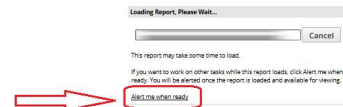


Page: Search Results

INTERNAL ID	SEARCH	SEARCH TYPE	OWNER	FORMAT	RESULTS	CREATED BY	CREATED ON	STATUS	COMPLETED	SIZE
210	[SCRIPT] Charges Ready for Release	Charge	Mike Kachline	CSV	Download	Mike Kachline	2019-05-14 17:17:06	Completed	2019-05-14 17:17:07	790

Running Timed-Out Reports


- Run your Report
- Click the tiny “Alert Me when Ready” text.
- Wait for an email in your inbox.
- Page: Report Results



VIEW RESULTS	STATUS	SCHEDULE NAME	SUBJECT	OWNER	REPORT NAME	DATE	DELETE
View	Complete	Income Statement Detail	Income Statement Detail	Mike Kachline	Income Statement Detail	5/14/2019 6:23 pm	Delete
View	Complete	Open Sales Orders	Open Sales Orders	Samuel Desjardins	Open Sales Orders	5/14/2019 4:00 am	Delete
View	Complete	Sales Orders Pending Fulfillment	Sales Orders Pending Fulfillment	Samuel Desjardins	Sales Orders Pending Fulfillment	5/14/2019 4:00 am	Delete

Did a File / Script Change?

- “Folder” Saved Search
- File ... Last Modified

ORACLE NETSUITE 

Activities Payments Transactions Lists Reports Analy

Saved Folder Search

Recent Script Changes

Save & Run Reset Cancel Preview New Template Cha

SEARCH TITLE *
Recent Script Changes

ID
customsearch_recent_scriptchanges

OWNER *
Mike Kachline

Criteria Results Highlighting Available Filters Audience Roles Email

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
Name DESCENDING

THEN BY
Name DESCENDING

THEN BY
Name DESCENDING

OUTPUT TYPE
Normal

SHOW TOTALS

RUN UNRESTRICTED

MY PREFERRED SEARCH RESULTS

Columns * Drill Down Fields *

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
File : Last Modified								
File : Name								
Name								
Location								
File : Owner								

Add Cancel Insert Remove Move Up Move Down Move To Top Move To Bottom

Copy to Account

Saved Folder Search

Recent Script Changes

Save & Run Reset Cancel Preview New Template Change ID Actions

SEARCH TITLE *
Recent Script Changes

ID
customsearch_recent_scriptchanges

OWNER *
Mike Kachline

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard Summary

FILTER *	DESCRIPTION *	FORMULA
File : File Type	is JavaScript File	
File : Last Modified	is within today	

Add Cancel Insert Remove

Save & Run Reset Cancel Preview New Template Change ID Actions

Use this tab to indicate columns to be included in the search results as well as sort order.

OUTPUT TYPE
Normal

SHOW TOTALS

RUN UNRESTRICTED

MY PREFERRED SEARCH RESULTS

Columns * Drill Down Fields *

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
File : Last Modified								
File : Name								
Name								
Location								
File : Owner								

Add Cancel Insert Remove Move Up Move Down Move To Top Move To Bottom

Password Vault

- <https://keepass.info/>
- Open Source, Mature
- Your data is stored on a file which you control.
- Compatible with everything (Windows, Mac, iOS, Android)
- Useful in conjunction with Dropbox / Google Drive / etc.
- “Auto Type” functionality (for Quicker logins)

