

NetSuite for Newbies



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CPAs & BUSINESS ADVISORS



Agenda

- High level Process Overviews
- Preferences
- Home Page
- KPIs
- Scorecards
- Global Search
- Standard reports
- CSV import
- Custom fields
- Tips and Tricks
 - Keyboard shortcuts
 - Label help
 - What permission is needed
 - Add New
- Getting Help with NetSuite Resources

Lead to Cash Process Overview (\$ IN) With Inventory

<u>Entities</u>	<u>Transactions</u>	<u>Debit/Credit</u>
Lead	None	None
↓	↓	
Prospect	Opportunity/Estimate	None
↓	↓	
Customer	Sales Order	None
	↓	
	Fulfillment	COGS/Inventory
	↓	
	Invoice	AR/Revenue
	↓	
	Payment	UndepFunds/AR
	↓	
	Deposit	Bank/UndepFunds



Lead to Cash Process Overview (\$ IN) Without Inventory

<u>Entities</u>	<u>Transactions</u>	<u>Debit/Credit</u>
Lead ↓	None ↓	None
Prospect ↓	Opportunity/Estimate ↓	None
Customer	Sales Order ↓	None
	Invoice ↓	AR/Revenue
	Payment ↓	UndepFunds/AR
	Deposit	Bank/UndepFunds



Purchase to Pay Process Overview (\$ OUT) With Inventory

<u>Entity</u>	<u>Transactions</u>	<u>Debit/Credit</u>
Vendor	Purchase Request	None
	Purchase Order	None
	Purchase Receipt	Inventory/RecNotBill
	Vendor Bill	RecNotBill/AP
	Payment	AP/Bank



Purchase to Pay Process Overview (\$ OUT)

Without Inventory

<u>Entity</u>	<u>Transactions</u>	<u>Debit/Credit</u>
Vendor	Purchase Request	None
	Purchase Order	None
	Purchase Receipt	None
	Vendor Bill	Expense/AP
	Payment	AP/Bank



Home>Set Preferences

General Tab

- User Profile
- Localization
- Formatting
- Defaults
 - Show Internal IDs
 - Only show last...
- Messages
- Optimizing NetSuite
 - Number of rows in list segments
 - Maximum entries in dropdowns



Home>Set Preferences

Appearance Tab

- Colors
- Styles
- Chart Themes
- Centers & Dashboards
 - Landing Page
- Entry Forms
 - Expand Tabs
- Accessibility



Home>Set Preferences

Transactions Tab

- Basic
- Warnings
- Printing

Analytics Tab

- Reporting
 - Report by Period
 - Default Bank account
- Search
 - Show list when one result
 - Include Inactives
- PDF
- Export
- KPI and Snapshot



Home>Set Preferences

Activities Tab

- Calendar
- Tasks & Phone Calls

Alerts Tab

- Schedule
- Subscribe to alerts

Custom Preferences Tab

- Drag and Drop (for example)




Home Page

- Reminders
- Shortcuts
- Quick Add
- Recent Records
- Settings
- Personalize
 - Standard content
 - Report Snapshots
 - Trend Graphs
- Layout
- Refresh manually

Key Performance Indicators

Set up KPIs for all of the metrics you want to track at a glance.

Key Performance Indicators				
Income	Expenses	Receivables	Payables	
 101.7%	 2.1%	 0.1%	 0.1%	
INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Income	This Period vs. Last Period	\$19,604	\$9,717	 101.7%
Total Bank Balance	This Period vs. Last Period	\$2,448,452	\$2,448,452	 0.0%
Sales	This Month vs. Last Month	\$19,604	\$2,217	 784.1%
Expenses	This Period vs. Last Period	\$4,717	\$4,817	 2.1%
Profit	This Period vs. Last Period	\$14,887	\$4,900	 203.8%
Project Billing Forecast	This Month vs. Last Month	\$0	\$0	 0.0%
Receivables	Today vs. Same Day Last Month	\$17,403,386	\$17,383,782	 0.1%
Payables	Today vs. Same Day Last Month	\$3,914,030	\$3,910,052	 0.1%
Operating Expenses	This Period vs. Last Period	\$2,500	\$2,600	 3.8%

Key Performance Indicators


Either select the standard KPIs from the list or create new ones using Saved Searches. Note that you can have a different comparison period for each.

Set Up Key Performance Indicators









































SaveCancelReset

☐ CACHED DATA

Key Performance Indicators

Standard Snapshots (9)
Click directly on text to edit selection. Click Add Custom KPIs to add the summary of results from a Saved Search. Custom KPIs are indicated with .

Add Standard KPIsAdd Custom KPIsMove To TopMove To BottomRemove All

	KEY PERFORMANCE INDICATOR	RANGE	HIGHLIGHT IF...	THRESHOLD	HEADLINE	COMPARE	COMPARE RANGE	
	 Income	This Period	Always	<input type="text"/>			Last Period	
	 Bank Balance	This Period					Last Period	
	 Sales	this month					last month	
	 Expenses	This Period	Always				Last Period	
	 Profit	This Period					Last Period	
	 Project Billing Forecast	this month					last month	
	 Receivables	today	Always				same day last month	
	 Payables	today	Always				same day last month	












Key Performance Indicators

Some notes regarding saved search used as custom KPIs

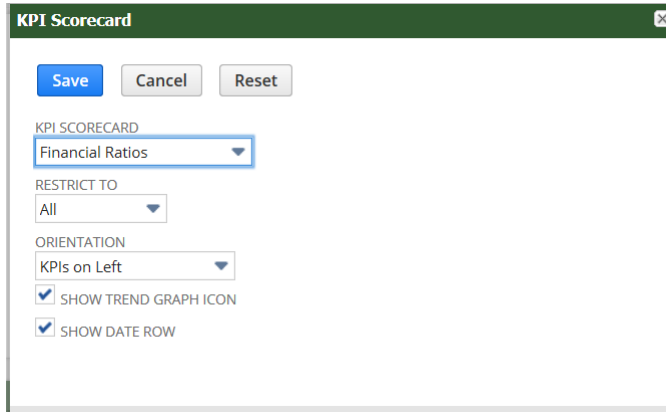
- The title of your search will appear in the custom KPI dropdown lists in the Set Up Key Performance Indicators popup and the KPI scorecard.
- Don't include date filters as search criteria.
- KPIs cannot enforce summary criteria filters because KPI calculations do not include groupings. If a saved search used as a custom KPI includes any summary criteria filters, the result for the KPI may differ from results when the search is run.
- On the **Results** subtab, define which fields you want to be returned in the saved search results. Make sure you have exactly one field that uses a summary type.
 1. If you want to display a count of the number of search results for a KPI, select a number or ID field (such as **Number**) and set a **Count** summary type for this field.
 2. If you want to display summary data such as sum (total), average, minimum, or maximum, select a field and set the appropriate summary type for it.
- On the **Available Filters** subtab, add a date field to be able to compare saved search results over different date ranges in a Key Performance Indicators portlet, a trend graph, a KPI meter, or a KPI scorecard.

Key Performance Scorecards

The KPI Scorecard portlet displays your choice of a performance scorecard. KPI scorecards can provide complex comparisons among multiple KPIs over multiple date ranges or accounting periods.

Financial Ratios			
INDICATOR	THIS PERIOD	LAST PERIOD	CHANGE
Date	5/1/2016-5/31/2016	4/1/2016-4/30/2016	
Current Ratio	1.73	1.73	 +0.05%
Receivables Turnover	0	0	 +101.52%
Days Sales Outstanding	27,520.08	53,668.18	 -50.38%
Inventory Turnover	0	0	 +0.03%
Days Inventory On Hand	32,179.12	31,151.09	 -0.03%
Asset Turnover	0	0	 +101.60%
Profit Margin on Sales	75.94%	50.43%	 +50.59%
Return on Assets	0.06%	0.02%	 +203.60%
Return on Equity	0.13%	0.04%	 +203.42%
Debt to Total Assets	0.57	0.57	 -0.04%
Debt to Equity	1.32	1.32	 -0.10%

Key Performance Scorecards



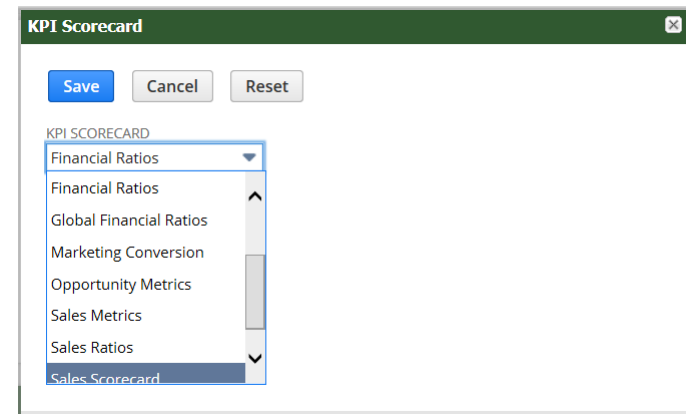
The screenshot shows the 'KPI Scorecard' configuration window. It has a title bar with a close button. Below the title bar are three buttons: 'Save' (highlighted in blue), 'Cancel', and 'Reset'. The main area contains the following settings:

- KPI SCORECARD:** A dropdown menu currently showing 'Financial Ratios'.
- RESTRICT TO:** A dropdown menu currently showing 'All'.
- ORIENTATION:** A dropdown menu currently showing 'KPIs on Left'.
- SHOW TREND GRAPH ICON:** A checked checkbox.
- SHOW DATE ROW:** A checked checkbox.

In the Setup on the Portal select the Scorecard you would like to see and how you would like to see it.

Use the Standard Scorecards that NetSuite provides or set up your own Custom Scorecards

- Go to Setup > Customization > KPI Scorecards > New.
- If this menu option is not available, the KPI Scorecards feature may not be enabled. Setup > Other Setup > Enable Features > Analytics subtab
- Or you may not have permission to create scorecards.



This screenshot shows the same 'KPI Scorecard' configuration window, but with the 'KPI SCORECARD' dropdown menu open. The menu lists the following options from top to bottom: 'Financial Ratios' (highlighted), 'Global Financial Ratios', 'Marketing Conversion', 'Opportunity Metrics', 'Sales Metrics', 'Sales Ratios', and 'Sales Scorecard' (at the bottom, also highlighted). The other settings and buttons remain the same as in the previous screenshot.

Key Performance Scorecards

Scorecard Data Calculation and Comparison Options

Comparison of KPI results for a greater variety of date range types

Comparison of KPI results for a progression of date ranges

Comparison of multiple KPIs' results

Different types of comparative calculations including:

- Sums: $A+B$

- Variances in absolute or percent terms: $A-B$ or $100(B-A)/A$

- Ratios in absolute or percentage terms: (B/A) or $100*B/A$

Inversion of date ranges in comparisons

Excel-like formulas with the following features:

- Formula results that can be expressed as:

 - Dollar amounts

 - Percentages

 - Numeric amounts

- Formula expressions that can include:

 - Multiple KPIs

 - Common functions

- Ability to define hidden formulas with results to be used by other formulas

Key Performance Scorecards

Scorecard Data Display Options

Ability to orient KPIs horizontally or vertically

Ability to define custom labels in place of KPI names

Optional popup trend graphs

Ability to limit displayed data to your own or your team's results.

GOTCHA WARNING:

If you want to use a saved search as a custom KPI in a scorecard and you have enabled the **Use Periods** option for a scorecard, only saved searches with a **Period** filter defined as an **Available Filter** can be defined as custom KPIs for the scorecard.

Global Search



In the Search field, found on the top center of any page, enter keywords that are part of the record or page that you're trying to quickly locate. You'll notice that as you type, NetSuite will begin to locate anything and everything that matches those keywords. The more you type, the more NetSuite can hone in on the specific record(s) you're looking for. Global search keywords can be made up of letters, numbers, dashes, underscores, and % wildcards.

Alt+G will move the cursor directly to the Global Search field



Global Search – Prefixes

You can easily narrow your search results to records of a singular type by adding a prefix to the search string. This speeds up the search and eliminates the return of irrelevant records that muddy the results. A search prefix is made up of the first few characters of a record type plus a colon (:) or a caret (^).

- Enter cu:max or cu^max to search for customers with keywords starting with the letters “max”. Possible results could be: Maxwell House, Your Maximum Mind, and Mad Max. Note the colon (:) and caret (^) are special command characters for global searches and used to separate a record type specifier from keywords.
- The following is a sample list of global search prefixes based on a language setting of English (U.S.) and default record names:

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



Global Search – Wildcard

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

NetSuite allows flexibility in searching for the unknown using the percent (%) and underscore (_) characters. The '%' will match a string of any length—including zero length. The '_' will match any single character.

- Enter `cu:%max` to search for customers with records containing the letters “max”, but potentially preceded by other letters. Possible results could be: Maxwell House, IMAX, Flomax, and Mad Max.
- Enter `inv:115%` to return all invoices starting with 115.
- Enter `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 – Other good stuff

Multiple text strings

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

Include inactive records

- Append a + to your keywords to include inactive records in a global search.
- Example: Enter cu:max+ to search for both active and inactive customers with records containing the letters max.

Return a single result in edit mode

- By default, a single record returned by a global search opens in view mode. You can override this default by capitalizing the first letter of a search prefix. (This prefix has no effect when the *Show List When Only One Result* preference is enabled.)
- Example: Enter Emp:fonzarelli, arthur to open this employee's record in edit mode.
- Example: Enter In:115 to open 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.



Global Search – And even more good stuff

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: Enter **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 a new browser window displaying the results list page, or the single result record in either view or edit mode.
- Example: Enter **in::115%** to open a new browser window displaying the list of invoices with invoice numbers starting with the digits 115.
- Example: Enter **In::115** to open a new browser window displaying invoice number 115 in edit mode.

Navigate quickly to NetSuite pages.

- Unsure of how to navigate to a certain menu option, simply type the title of the page in the global search field.
- Example: Enter **page:approve** to return a list of pages beginning with the name “Approve” (i.e. Approve Bills, Approve Invoices, Approve Time, etc)

There are several different reporting capabilities native to NetSuite

- Standard Reports
 - Reports tab
 - Pre-defined “left side”
 - Start with one that is close and customize
- Custom Layouts
 - First “button” on the customization for Financial Reports
 - Allows you to change the ROWS of a report
- Saved Searches
 - Database Queries
 - Powerful!
 - Limited to single join (double join announced at SW2016!)
 - No “smarts” built in like standard reports
 - Limited formatting capability (no subtotals ☹)

CSV Import

The CSV Import is an extremely powerful (and sometimes dangerous) tool. Make it your best friend!

Go to Setup>Import/Export

IMPORT TASKS

Import CSV Records

View CSV Import Status

Saved CSV Imports

CSV Import Preferences

Import Quicken® QIF File

CSV Import Preferences

Save

Cancel

Reset

CUSTOM DELIMITER FOR MULTI-SELECT VALUES *

|

☐ LOG SYSTEM NOTES FOR CUSTOM FIELDS

☐ RUN SERVER SUITESCRIPT AND TRIGGER WORKFLOWS

CSV COLUMN DELIMITER

Comma

CSV DECIMAL DELIMITER

Period

CSV Import – Transaction Types

- Cash Sale Import
- Credit Memo Import
- Custom Transactions Import
- Customer Payment Import
- Estimate Import
- Fixed Assets Import (see Updating Asset Records Using CSV Import)
- Inventory Cost Revaluation Import
- Inventory Transfer Import
- Invoice Import
- Item Demand Plan Import
- Item Supply Plan Import
- Journal Entry Import and Intercompany Journal Entry Import (Use this record type to import multiple journal entries at a time. To import a single journal entry, see Single Journal Entry Import.)
- Opportunity Import
- Purchase Order Import
- Return Authorization Import
- Sales Order Import
- Statistical Journal Entry Import
- Vendor Bill Import
- Vendor Credit Import
- Vendor Payment Import
- Vendor Return Authorization Import



CSV Import – other types

Accounting Import Type

- Chart of Accounts Import
- Currency Exchange Rates Import
- Expense Categories Import
- Fair Value Price CSV Import
- Global Account Mapping Import
- Item Account Mapping Import

Activities Import Type

- Events Import
- Phone Calls Import
- Tasks Import

Classification Import Type

- Class Import
- Custom Segment Value Import
- Department Import
- Location Import

Communications Import Type

- Messages Import
- Notes Import

Custom Records Import

Customization Import Type

- Custom List Import

Employees Import Type

- Employees Import
- Expense Report Import
- Track Time Import

Items Import

Supply Chain Import Type

- Bin Import
- Item Revision Import
- Manufacturing Cost Template Import
- Manufacturing Routing Import

Support Import Type

- Issues Import
- Solutions Import
- Support Cases Import
- Topics Import

Website Import Type

- Site Category Import

Relationships Import Type

- Contacts Only Import
- Customers Only Import
- Customers and Contacts Together Import (See Importing Entities and Contacts Together)
- Projects (Jobs) Import
- Leads Only Import
- Leads and Contacts Together Import (See Importing Entities and Contacts Together)
- Partners Import
- Prospects Only Import
- Prospects and Contacts Together Import (See Importing Entities and Contacts Together)
- Vendors Import



CSV Import – Step 1

Select the import type and pick the CSV file(s)

Scan & Upload CSV File

IMPORT TYPE

Transactions x ▼

Choose the category of data to import.

RECORD TYPE

Invoice ▼

Choose the record type of data to import.

CHARACTER ENCODING

Western (Windows 1252) ▼

Choose another character encoding format if you use an international or Macintosh version of Microsoft Excel, or if you typically use special characters.

CSV COLUMN DELIMITER

Comma ▼

Select the symbol to be used as a column separator in the CSV files you import. This setting overrides the column separator preference specified at Home > Set Preferences.


CSV File(s)

☒ ONE FILE TO UPLOAD

☐ MULTIPLE FILES TO UPLOAD

Choose whether to import data from a single file or multiple files, and click the Select button(s) to browse to the file(s) to be uploaded.

Select...

 Import Employees Test.csv

x REMOVE



CSV Import – Step 2

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 selectively 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 > Set Preferences.

CUSTOM FORM

Standard Product Invoice ▼

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





















CSV Import – Step 3

Map your fields. The CSV column headers show on the left. The fields in NS show on the right. The mapping is in the middle. Use the Pencil to set defaults or select internal ID.

Field Mapping

Your Fields
Import Employees Test.csv

- First Name
- Last Name
- Email
- Phone
- Supervisor

 Email	↔	Invoice : Email	
	↔	Invoice : Client (Req)	
 5/24/2016	↔	Invoice : Date (Req)	
	↔	Invoice Items : Item	
	↔		
	↔		
	↔		
	↔		
	↔		
	↔		

NetSuite Fields
Invoice

- Account
- Actual Usage
- Additional Tracking #
- Allow Letters to be Emailed
- Allow Letters to be Printed
- Bill To Select
- Class
- Client (Req)
- Client Message
- Collections Activity
- Collections Notes
- Collections Promised Payment Date
- Contract Start Date
- Currency
- Customs Registration Number
- Date (Req)



CSV Import – Final Step

Then Save and Run. Check the Import status to see the results. You will receive an email upon completion. Click on the Results file to see what did not import.

Save mapping & Start Import

Your CSV files are ready to be imported into your NetSuite account.

You can save your Field Mapping to be used again later (optional). To work with a saved Import, go to the "saved Imports" page under the Setup > Import/Export Tab.

IMPORT MAP NAME

Provide a unique Import Map name to save the current mapping choices for future imports.

DESCRIPTION

(Optional) Provide a useful description for this Import Map.

SCRIPT ID

(Optional) Provide a unique ID to identify this Import Map in SuiteScript.
Your entry here is prefixed with CUSTIMPORT.

Tips for Success with CSV Import:

- Check date fields – they can switch to Julian
- Check for empty headers
- Check for empty rows
- Validate the lists ahead of time using filters or index/match or lookups
- Use the internal ID when practical
- Even if you have to use the Two File import approach, you can still refer to the same file.
- Naming Conventions Matter!
- Share your imports by updating the Access link on the Saved Search list.

ID	NAME ▲	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE	OWNER	CREATED	LAST MODIFIED	SCRIPT ID	FROM BUNDLE	ACCESS	DELETE
19	1	Translate	View		Leads Only	Larry Nelson	09/13/2015 11:41 am	03/12/2016 8:02 pm			Private	
20	20	Translate	View		Leads Only	Larry Nelson	09/13/2015 11:49 am	03/12/2016 8:02 pm			Private	
28	35645	Translate	View		Leads Only	APAC User	09/14/2015 4:21 pm	03/12/2016 8:02 pm			Private	
21	453	Translate	View		Leads Only	Larry Nelson	09/13/2015 11:58 am	03/12/2016 8:02 pm			Private	
22	545	Translate	View		Leads Only	Larry Nelson	09/13/2015 12:11 pm	03/12/2016 8:02 pm			Private	
27	56565656	Translate	View		Leads Only	APAC User	09/14/2015 2:24 pm	03/12/2016 8:02 pm			Private	

Custom Fields

It's simple to create new fields in NetSuite
(almost too easy!)



- One easy way to do it is to go to the record you want the field to be on and while in the edit mode click on the Customize link and then select New Field.
- You can also get there by going to Customization>Lists, Records, & Fields>Entity Fields>New (or other type of new field)



Custom Fields

Custom Entity Field

List

Save ▼ **Cancel** **Reset** | **Apply to Forms**

LABEL *

ID

OWNER

Marc Collins ▼

DESCRIPTION

TYPE

Free-Form Text ▼

LIST/RECORD

▼

☒ STORE VALUE ☐ USE ENCRYPTED FORMAT

☐ SHOW IN LIST

- ☐ GLOBAL SEARCH
- ☐ RECORD IS PARENT
- ☐ AVAILABLE TO SUITESIGNON
- ☐ INACTIVE

Applies To **Display** **Validation & Defaulting** **Sourcing & Filtering** **Access** **Translation**



- | | | |
|--|---|---|
| <input checked="" type="checkbox"/> CLIENT | <input type="checkbox"/> CONTACT | <input type="checkbox"/> AVAILABLE EXTERNALLY |
| <input type="checkbox"/> PROJECT | <input type="checkbox"/> PARTNER | <input type="checkbox"/> PRINT ON STATEMENT |
| <input type="checkbox"/> VENDOR | <input type="checkbox"/> GENERIC RESOURCE | <input type="checkbox"/> PRINT ON PRICE LIST |
| <input type="checkbox"/> EMPLOYEE | <input type="checkbox"/> WEB SITE | <input type="checkbox"/> PROJECT TEMPLATE |
| <input type="checkbox"/> OTHER NAME | <input type="checkbox"/> GROUP | |

Save ▼ **Cancel** **Reset** | **Apply to Forms**

Tips and Tricks: Keyboard Shortcuts

Searching All Data in Your Account

Alt+G will move the cursor directly to the Global Search field

Entering Data and Completing Forms

- Press and hold Alt and type a letter to move to a subtab.
- In transaction headers, press Enter to save the transaction.
- On a transaction line, press Enter to save the line and go to the next line.
- Press Tab to move the cursor between fields and buttons.
- Use the Spacebar to check or clear a check box.
- In Amount fields, you can calculate an amount by entering the equation: $5+9$ and then tab.
- Press and hold Ctrl while clicking with your mouse to select multiple choices in a list.

Tips and Tricks: Keyboard Shortcuts

Date Fields

- Press p to enter the end of the current period.
- Press m to enter the last day of the month.
- Press l (lower case L) to enter the end of the last period.
- Press y to enter yesterday's date.
- Press t to enter today's date.
- Press shift+t to enter tomorrow's date.
- Press the Plus Sign (+) to increase one day.
- Press the Minus Sign (-) to decrease one day.

Note: These keyboard shortcuts are supported only in full date fields that include the month, day, and year.

Tips and Tricks: Keyboard Shortcuts

Multi-Choice buttons

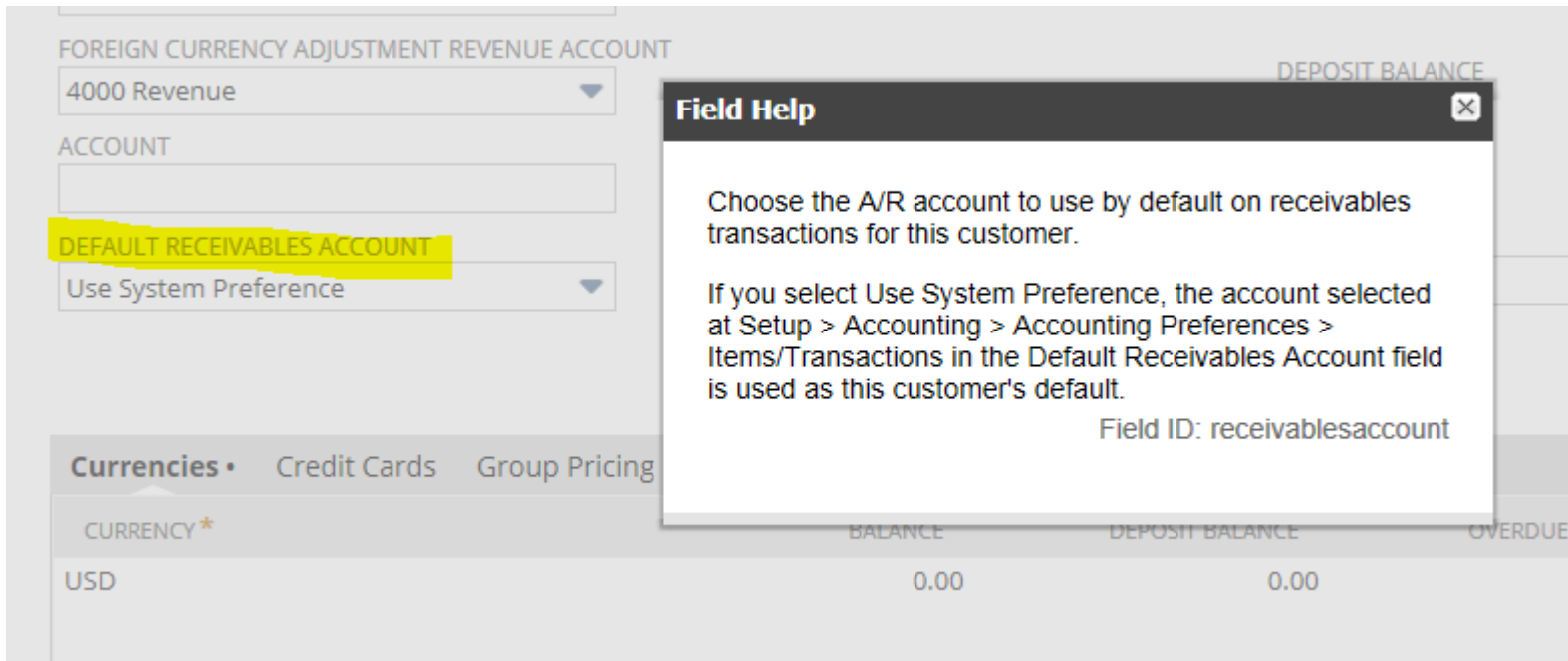
On transactions and records that have buttons with popup lists, you can select the non-default button option. Use the Tab key to navigate to the list button. Then, use the down arrow key to expand the dropdown list. Click Enter to select the desired action. To collapse the list, use the up arrow key to return to the top.

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.

Tips and Tricks: Label Help

Don't forget that you can click on the label of a field to get field level help
(most of the time)



The screenshot shows a software interface with a 'Field Help' popup. The background interface includes a dropdown menu for 'FOREIGN CURRENCY ADJUSTMENT REVENUE ACCOUNT' with '4000 Revenue' selected, an 'ACCOUNT' field, and a 'DEFAULT RECEIVABLES ACCOUNT' dropdown menu with 'Use System Preference' selected. Below these are tabs for 'Currencies', 'Credit Cards', and 'Group Pricing'. A table at the bottom shows 'CURRENCY' as 'USD' with 'BALANCE' and 'DEPOSIT BALANCE' both at '0.00'. The 'Field Help' popup is titled 'Field Help' and contains the following text:

Choose the A/R account to use by default on receivables transactions for this customer.

If you select Use System Preference, the account selected at Setup > Accounting > Accounting Preferences > Items/Transactions in the Default Receivables Account field is used as this customer's default.

Field ID: receivablesaccount

Tips and Tricks: 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



Notice

■Permission Violation: You need the 'Lists -> Accounts' permission to access this page. Please contact your account administrator.

[Go Back](#)



Tips and Tricks: Add New



Help



Marc Collins

Dilley Services OW SRP - SDT - 2015.1.6.16_US - 2-Sales Rep

There is an Add New Icon near the top right of your NetSuite Screen

New Bar Set Up

Save

Cancel

Reset

Move To Top

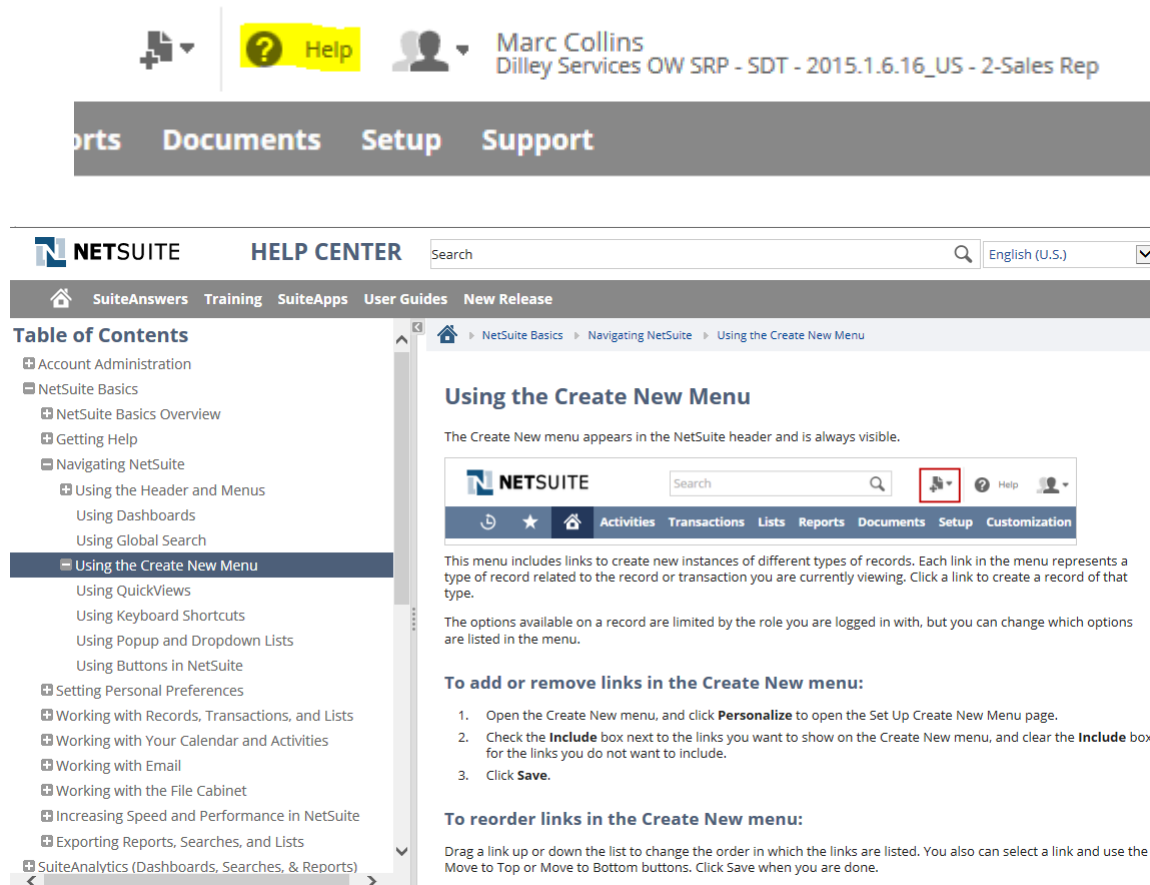
Move To Bottom

	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)

Click on Personalize in the drop down to add the transactions or entities you would like to see and to change their order

NetSuite Help Resources – Help Center

Click on the Help button at the top of your screen to get to the Help Center. It's Contextual or Browse the Table of Contents.



The screenshot shows the NetSuite interface. At the top, there is a navigation bar with a 'Help' button (a yellow circle with a question mark) and a user profile for 'Marc Collins'. Below this is a dark grey bar with links: 'ports', 'Documents', 'Setup', and 'Support'. The main content area is titled 'HELPER CENTER' and includes a search bar and a language dropdown set to 'English (U.S.)'. A sidebar on the left lists the 'Table of Contents' with categories like 'Account Administration', 'NetSuite Basics', 'Getting Help', 'Navigating NetSuite', 'Using the Header and Menus', 'Using the Create New Menu' (highlighted), 'Using QuickViews', 'Using Keyboard Shortcuts', 'Using Popup and Dropdown Lists', 'Using Buttons in NetSuite', 'Setting Personal Preferences', 'Working with Records, Transactions, and Lists', 'Working with Your Calendar and Activities', 'Working with Email', 'Working with the File Cabinet', 'Increasing Speed and Performance in NetSuite', 'Exporting Reports, Searches, and Lists', and 'SuiteAnalytics (Dashboards, Searches, & Reports)'. The main content area displays the 'Using the Create New Menu' article, which explains that the Create New menu is always visible in the NetSuite header and provides instructions on how to add, remove, and reorder links in the menu. A red box in the screenshot highlights the 'Help' button in the NetSuite header.

Table of Contents

- Account Administration
- NetSuite Basics
 - NetSuite Basics Overview
- Getting Help
- Navigating NetSuite
 - Using the Header and Menus
 - Using Dashboards
 - Using Global Search
 - Using the Create New Menu
 - Using QuickViews
 - Using Keyboard Shortcuts
 - Using Popup and Dropdown Lists
 - Using Buttons in NetSuite
- Setting Personal Preferences
- Working with Records, Transactions, and Lists
- Working with Your Calendar and Activities
- Working with Email
- Working with the File Cabinet
- Increasing Speed and Performance in NetSuite
- Exporting Reports, Searches, and Lists
- SuiteAnalytics (Dashboards, Searches, & Reports)

Using the Create New Menu

The Create New menu appears in the NetSuite header and is always visible.

This menu includes links to create new instances of different types of records. Each link in the menu represents a type of record related to the record or transaction you are currently viewing. Click a link to create a record of that type.

The options available on a record are limited by the role you are logged in with, but you can change which options are listed in the menu.

To add or remove links in the Create New menu:

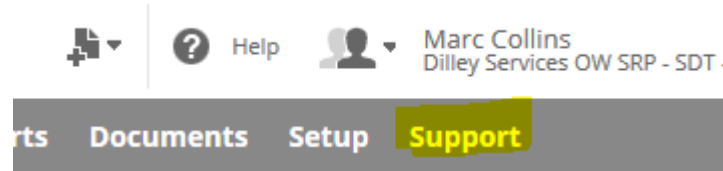
- Open the Create New menu, and click **Personalize** to open the Set Up Create New Menu page.
- Check the **Include** box next to the links you want to show on the Create New menu, and clear the **Include** box for the links you do not want to include.
- Click **Save**.

To reorder links in the Create New menu:

Drag a link up or down the list to change the order in which the links are listed. You also can select a link and use the Move to Top or Move to Bottom buttons. Click Save when you are done.

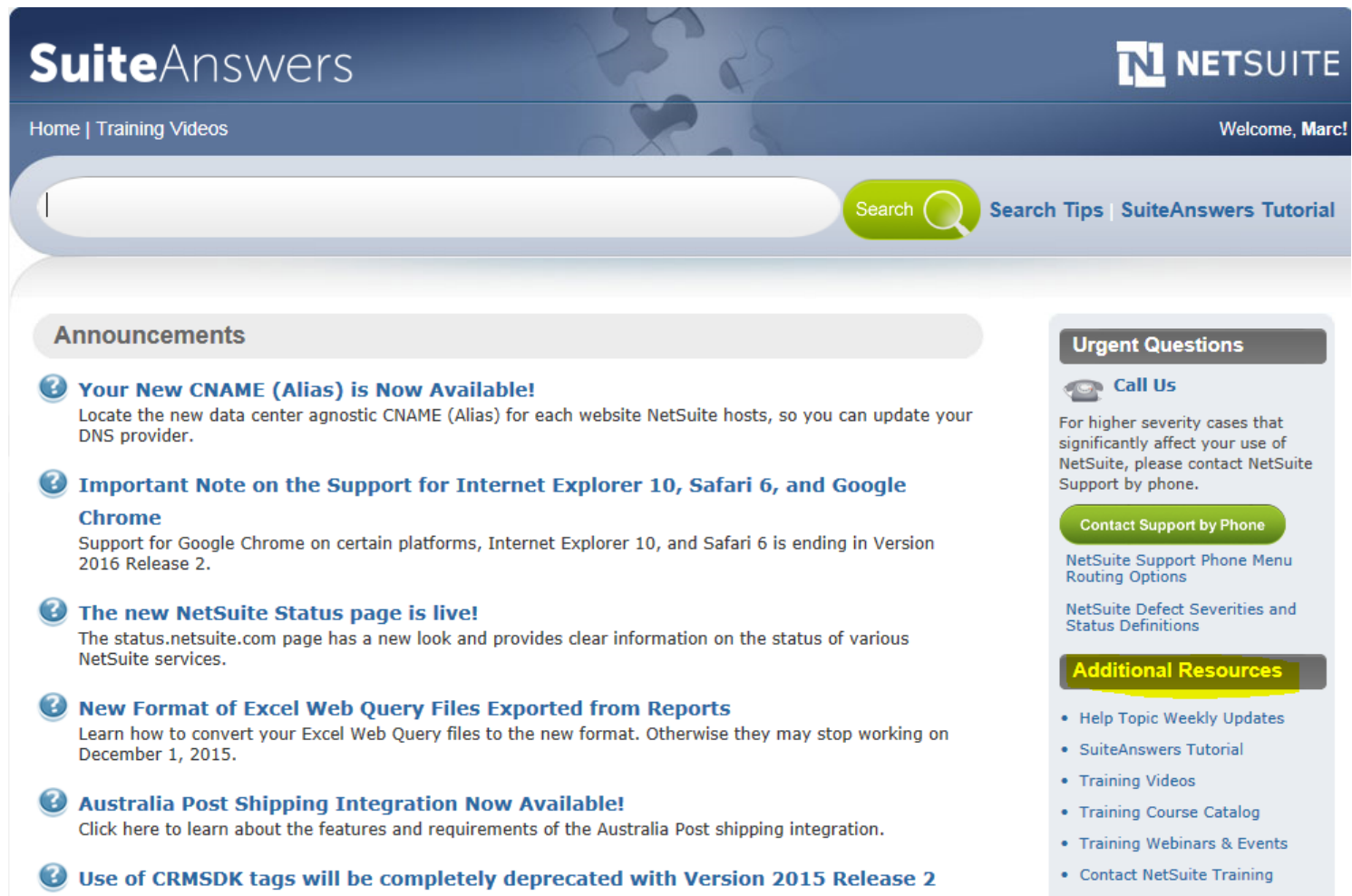
NetSuite Help Resources – Support Tab

Type “help:xxxxx” to go straight to SuiteAnswers
Click on the Support Tab to get to SuiteAnswers



NetSuite Help Resources – SuiteAnswers

Either Search or go to the Additional Resources



The screenshot shows the SuiteAnswers website interface. At the top, there's a dark blue header with the 'SuiteAnswers' logo on the left and the 'NETSUITE' logo on the right. Below the logo, a navigation bar contains 'Home | Training Videos' on the left and 'Welcome, Marc!' on the right. A large search bar is centered below the navigation bar, with a green 'Search' button featuring a magnifying glass icon. To the right of the search bar are links for 'Search Tips' and 'SuiteAnswers Tutorial'. The main content area is divided into two columns. The left column is titled 'Announcements' and contains a list of six items, each starting with a question mark icon and a bold title, followed by a brief description. The right column contains two sections: 'Urgent Questions' with a 'Call Us' button and text about contacting support for severe issues, and 'Additional Resources' with a list of links including 'Help Topic Weekly Updates', 'SuiteAnswers Tutorial', 'Training Videos', 'Training Course Catalog', 'Training Webinars & Events', and 'Contact NetSuite Training'.

SuiteAnswers **NETSUITE**

Home | Training Videos Welcome, Marc!

Search Search Tips | SuiteAnswers Tutorial

Announcements

- ? Your New CNAME (Alias) is Now Available!**
Locate the new data center agnostic CNAME (Alias) for each website NetSuite hosts, so you can update your DNS provider.
- ? Important Note on the Support for Internet Explorer 10, Safari 6, and Google Chrome**
Support for Google Chrome on certain platforms, Internet Explorer 10, and Safari 6 is ending in Version 2016 Release 2.
- ? The new NetSuite Status page is live!**
The status.netsuite.com page has a new look and provides clear information on the status of various NetSuite services.
- ? New Format of Excel Web Query Files Exported from Reports**
Learn how to convert your Excel Web Query files to the new format. Otherwise they may stop working on December 1, 2015.
- ? Australia Post Shipping Integration Now Available!**
Click here to learn about the features and requirements of the Australia Post shipping integration.
- ? Use of CRMSDK tags will be completely deprecated with Version 2015 Release 2**

Urgent Questions

Call Us

For higher severity cases that significantly affect your use of NetSuite, please contact NetSuite Support by phone.

Contact Support by Phone

[NetSuite Support Phone Menu](#)
[Routing Options](#)

[NetSuite Defect Severities and Status Definitions](#)

Additional Resources

- [Help Topic Weekly Updates](#)
- [SuiteAnswers Tutorial](#)
- [Training Videos](#)
- [Training Course Catalog](#)
- [Training Webinars & Events](#)
- [Contact NetSuite Training](#)

NetSuite Help Resources – Training Videos

The Training Videos are a great place to start



The screenshot shows the SuiteAnswers Training Videos page. The header includes the SuiteAnswers logo, navigation links for Home and Training Videos, a search bar with the placeholder text "Enter your search keywords...", and a Search button. Below the header, the page title "SuiteAnswers Training Videos" is displayed, followed by a brief description: "Watch training videos to get started with NetSuite, learn about new features, or replay a recorded training webinar." The main content area is titled "Training Videos" and features a sidebar on the left with a "Browse Training" section. This section lists various training topics, with "Getting Started" currently selected. The main content area displays a list of training videos under the heading "Getting Started". Each video entry includes a video icon, the video title, and a "User Rating" with five stars. The list shows 10 results, with the first 10 videos listed. The page also includes pagination links "1 2" and a "You are viewing 1 - 10 of 18 Results" indicator.

SuiteAnswers
Home | Training Videos
Enter your search keywords...
Search Search Tips

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
2016.1 New Feature Training
2015.2 New Feature Training
Training Webinars
Administration/Data
CRM (Customer Relationship Mgmt)
Contract Renewals
Customization/Integration
ERP: Financials, SCM, etc.
Ecommerce
Financial Management
International
Items/Fulfillment/Billing
Marketing
OpenAir
Order Management
OneWorld
Payroll
Purchasing/Accounts Payable
Sales Force Automation
Saved Searches/Reports
Services/Resource Planning

Getting Started

You are viewing 1 - 10 of 18 Results 1 2

	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 18 Results 1 2

Questions?



This presentation is presented with the understanding that the information contained does not constitute legal, accounting or other professional advice. It is not intended to be responsive to any individual situation or concerns, as the contents of this presentation are intended for general informational purposes only. Viewers are urged not to act upon the information contained in this presentation without first consulting competent legal, accounting or other professional advice regarding implications of a particular factual situation. Questions and additional information can be submitted to your Eide Bailly representative, or to the presenter of this session.



CPAs & BUSINESS ADVISORS

Thank You!



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