



**DANA LARSON**  
CONSULTING



# **NetSuite 101 :Back to Basics**

---

Rocky Mountain NetSuite User Group

# Agenda

---

- General Navigation
- Reminders
- Preferences
- Global Search
- How to get Help
- Entities vs. Transactions
- Custom Forms
- Permissions
- Lists
- In-line editing
- Print Checks and Forms
- Overview on reporting options

# General Navigation

---

Shortcuts

Quick Add

Recent Records

Personalize Dashboard

- Standard content
- Report Snapshots
- Trend Graphs

Layout

Refresh manually

# Reminders

---

Reminders are a powerful way to set yourself (or your employees) up for success.

Create searches that tell you when you are required to act. When entities or transactions enter a given state, they show up on your dashboard.

It's conceivable that someone's entire job could be driven by reminders.

A great tool for keeping data clean.

Create reminders for tasks due or overdue.

Add Headline Reminders with colors to highlight what needs to be done.

# 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
  - Customer Dashboard
- Entry Forms
  - Expand Tabs
- Accessibility

# Home➤Set Preferences

---

## Analytics Tab

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

# Home➤Set Preferences

---

## Activities Tab

- Calendar
- Tasks & Phone Calls

## Alerts Tab

- Schedule
- Subscribe to alerts

## Custom Preferences Tab

- Drag and Drop (for example)



# 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.

# Global Search - Prefixes

---

The following is a sample list of global search prefixes based on a language setting of English (U.S.) and 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

---

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

---

## 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.)
- 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.

# Help! – Label Help

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

And now that you can customize the field level help, they can be very helpful for end users.

The screenshot shows a software interface with a 'Field Help' dialog box open. The dialog box has a title bar 'Field Help' with a close button (X). The main text inside the dialog box reads: 'Choose the A/R account to use by default on receivables transactions for this customer.' followed by '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.' and 'Field ID: receivablesaccount' at the bottom right. In the background, the software interface is visible. It has a top section with 'FOREIGN CURRENCY ADJUSTMENT REVENUE ACCOUNT' and a dropdown menu showing '4000 Revenue'. Below that is an 'ACCOUNT' field. Further down is a yellow highlighted section labeled 'DEFAULT RECEIVABLES ACCOUNT' with a dropdown menu showing 'Use System Preference'. At the bottom, there is a 'Currencies' tab selected, with a table showing 'CURRENCY' as 'USD'. To the right of the dialog box, there is a table with columns 'BALANCE', 'DEPOSIT BALANCE', and 'OVERDUE', with values '0.00' and '0.00' respectively.

CURRENCY	BALANCE	DEPOSIT BALANCE	OVERDUE
USD	0.00	0.00	

# Help! – Help Center

Click on the Help button at the top of your screen or Type “help:xxxxx” to go straight to the Help Center.

It's Contextual or you can Browse the Table of Contents.

You can also get to the User Guides here.

The screenshot displays the NetSuite Help Center interface. At the top, there's a header with the NetSuite logo, 'HELP CENTER', a search bar, and a language dropdown set to 'English (U.S.)'. Below the header is a navigation bar with links: Home, SuiteAnswers, Training, SuiteApps, User Guides, and New Release. The main content area is divided into two columns. The left column, titled 'Table of Contents', lists various topics with expandable/collapsible icons. The 'Using the Create New Menu' item is highlighted. The right column shows the article 'Using the Create New Menu'. It includes a sub-header, a brief description, a screenshot of the NetSuite header with the 'Create New' button highlighted by a red box, and a list of steps to add or remove links in the menu. The article also mentions that options are limited by the user's role and provides instructions on how to reorder links.

**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.

# Help! – Support Tab

---

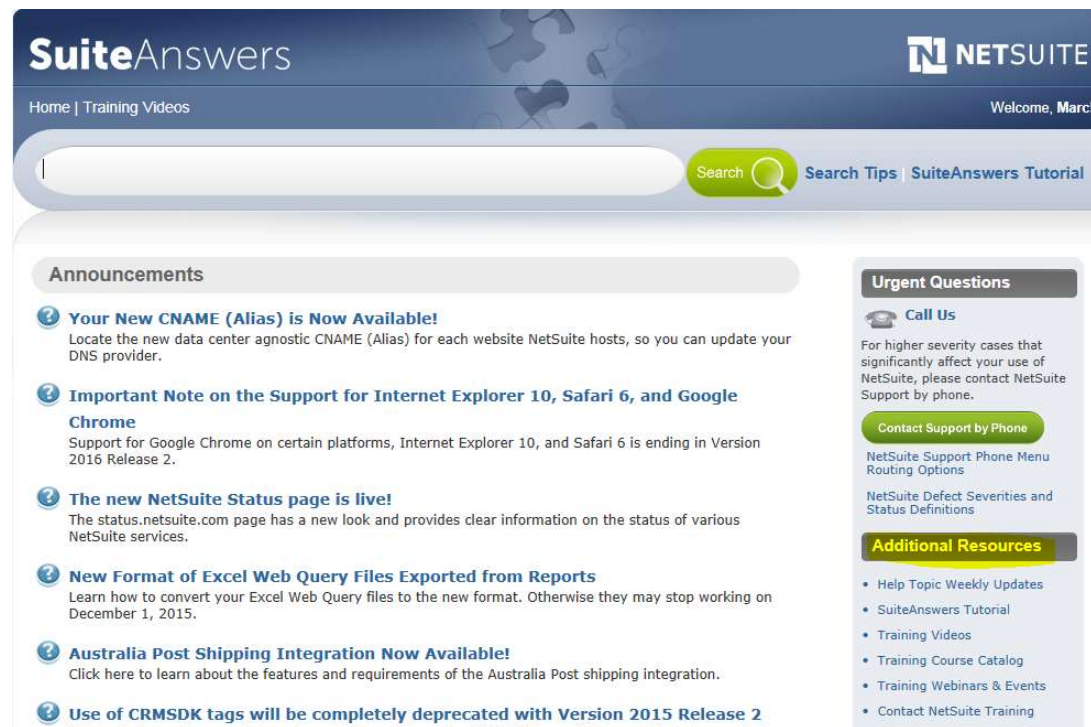
Click on the Support Tab to get to SuiteAnswers





# Help! – Suite Answers

Either Search or go to the Additional Resources



The screenshot shows the SuiteAnswers help page. At the top, there's a header with the 'SuiteAnswers' logo on the left and the 'NETSUITE' logo on the right. Below the SuiteAnswers logo is a link to 'Home | Training Videos'. On the right side of the header, it says 'Welcome, Marc!'. Below the header is a search bar with a green 'Search' button. 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 six items, each with a question mark icon and a title: 'Your New CNAME (Alias) is Now Available!', 'Important Note on the Support for Internet Explorer 10, Safari 6, and Google Chrome', 'The new NetSuite Status page is live!', 'New Format of Excel Web Query Files Exported from Reports', 'Australia Post Shipping Integration Now Available!', and 'Use of CRMSDK tags will be completely deprecated with Version 2015 Release 2'. The right column is titled 'Urgent Questions' and contains a 'Call Us' section with a phone icon and text about contacting support for higher severity cases, a 'Contact Support by Phone' button, and links to 'NetSuite Support Phone Menu Routing Options' and 'NetSuite Defect Severities and Status Definitions'. Below this is an 'Additional Resources' section with a list of links: '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.

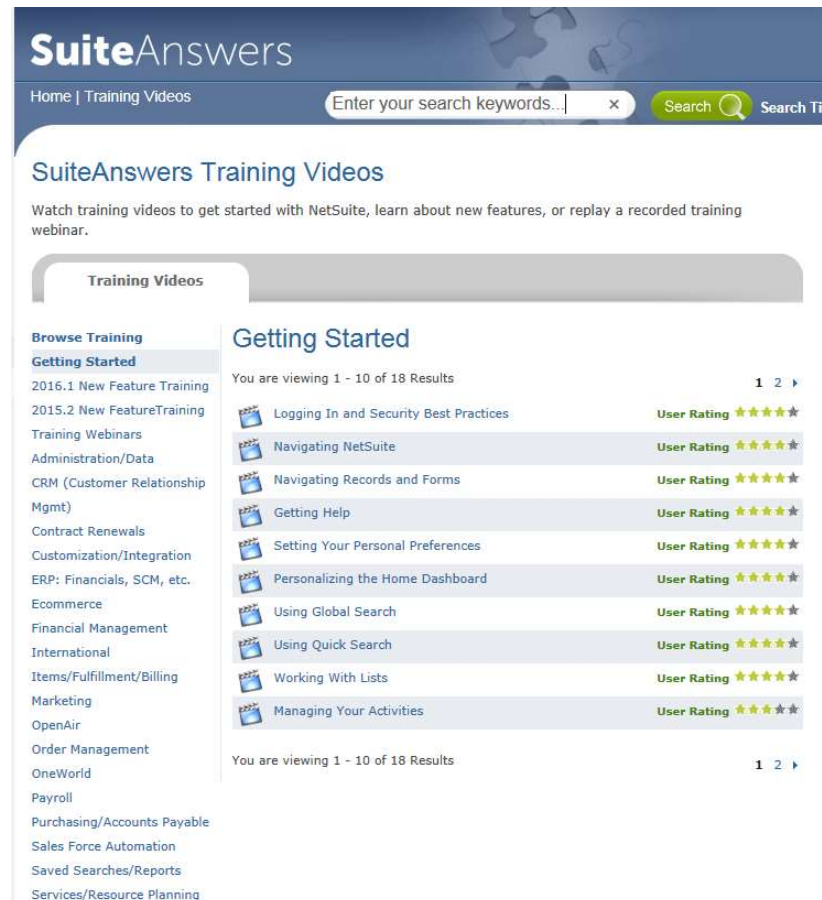
**Contact Support by Phone**  
NetSuite Support Phone Menu  
Routing Options  
NetSuite Defect Severities and Status Definitions

**Additional Resources**

- Help Topic Weekly Updates
- SuiteAnswers Tutorial
- Training Videos
- Training Course Catalog
- Training Webinars & Events
- Contact NetSuite Training

# Help! – Suite Answers

The Training Videos are a great place to start



The screenshot shows the SuiteAnswers Training Videos page. At the top, there's a navigation bar with 'SuiteAnswers' and links for 'Home' and 'Training Videos'. A search bar is present with the placeholder text 'Enter your search keywords...'. Below the navigation bar, the page title is 'SuiteAnswers Training Videos'. A brief description states: '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 is divided into two sections: 'Browse Training' and 'Getting Started'. The 'Browse Training' section on the left lists various training topics, including '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', and 'Services/Resource Planning'. The 'Getting Started' section on the right displays a list of 18 results, showing the first 10. Each result includes a video icon, a title, and a user rating (5 stars). The results are: '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 includes pagination links '1 2 >'.

**SuiteAnswers**

Home | Training Videos

Enter your search keywords... x 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

	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

# Custom Forms

---

Custom forms are a powerful tool for guiding data entry and making it as efficient as possible.

Most of the time, you will want to hide the “custom form” field on a form so that a user can’t change the form.

Great for:

- Removing all extraneous fields on the form (per role) for faster data entry
- Changing the tab and/or field order based on the needs of different roles
- Creates more granular (field by field) security
  - Hide specific data from specific roles
  - Show fields as inline so a user can see them but not change them

# Custom Forms

You can hide the “custom form” field on a form so that a user can't change the form.

You can set forms as preferred by role.

## Custom Entry Form

[Save](#) [Cancel](#) [Reset](#) [Move Elements Between Subtabs](#) [Change ID](#) [Actions](#)

NAME \*

Custom Vendor Form

ID

custform\_42\_4288281\_903

TYPE

Entity

SUBTYPE

Vendor

☐ INACTIVE

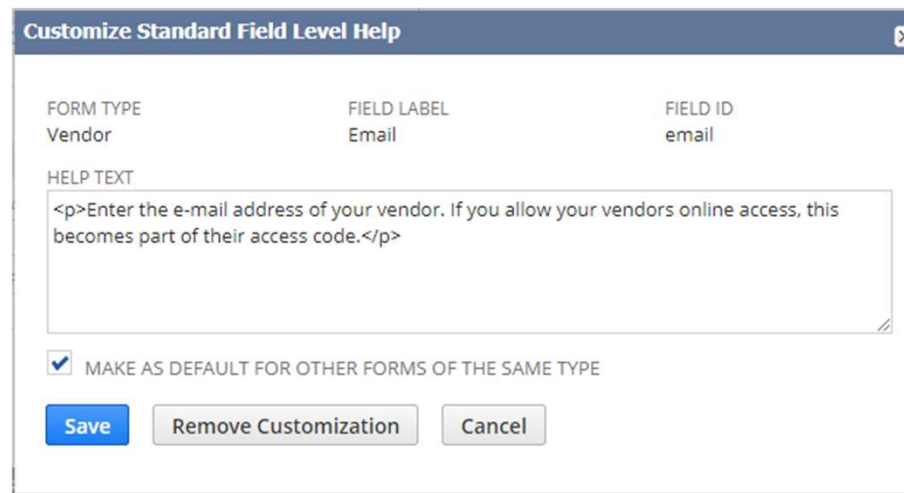
[Subtabs](#) [Field Groups](#) [Fields](#) [Actions](#) [Sublists](#) [QuickView](#) [Custom Code](#) [Roles](#) [History](#)

Make this the preferred form for any standard or custom role.

PREFERRED	ROLE ▲	CENTER TYPE
<input type="checkbox"/>	A/P Clerk	Accounting Center
<input type="checkbox"/>	Accountant	Accounting Center
<input type="checkbox"/>	Accountant (Reviewer)	Accounting Center
<input type="checkbox"/>	Administrator	Classic Center
<input type="checkbox"/>	Bookkeeper	Accounting Center

# Custom Forms- Field level help

You can even update the field level help by form!



The screenshot shows a dialog box titled "Customize Standard Field Level Help". It contains a table with three columns: "FORM TYPE", "FIELD LABEL", and "FIELD ID". The first row shows "Vendor" for the form type, "Email" for the field label, and "email" for the field ID. Below the table is a "HELP TEXT" section with a text area containing the text: "<p>Enter the e-mail address of your vendor. If you allow your vendors online access, this becomes part of their access code.</p>". At the bottom of the dialog, there is a checkbox labeled "MAKE AS DEFAULT FOR OTHER FORMS OF THE SAME TYPE" which is checked. Below the checkbox are three buttons: "Save", "Remove Customization", and "Cancel".

FORM TYPE	FIELD LABEL	FIELD ID
Vendor	Email	email

HELP TEXT

<p>Enter the e-mail address of your vendor. If you allow your vendors online access, this becomes part of their access code.</p>

☒ MAKE AS DEFAULT FOR OTHER FORMS OF THE SAME TYPE

Save Remove Customization Cancel

Fun fact: you can see all of these customized field level helps at Customization>Lists, Records & Fields>Custom help for standard fields.

And don't forget that they can be created for multiple languages if enabled!

# Permissions

---

User access in NetSuite is driven by roles.  
Each role is set up with a specific set of permissions.

- Lists
- Transactions
- Setup
- Customization

Best practice is to have one permission but it's not uncommon to have more than one for a user. Be sure to customize the system delivered roles so that you can update them in the future without losing the user's dashboard.

When someone is on vacation, you can give their role to another user to allow them to be a backup.

(tip: You can publish dashboards from one role to another if the role is in the same "Center")

# Permissions

---

You can compare roles (Setup>User Roles>Show Role Differences) so that you can see what is different between roles – or uncheck the “Only Show Differences” box to see ALL permissions for both roles.

There is a free bundle called “Custom Administrator” that allows you customize the administrator role. You can then use it to compare to other roles.

Best practice is to have roles that create the proper separation of duties (a key Sarbanes-Oxley (SOX) requirement). You may need to document your permissions to prove separation of duties.

# Permissions – TRICK

---

- Are you having trouble figuring out which 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 (this works most of the time – but not all of the time)

The excel file with all permissions listed is at this link:

[https://nlcorp.app.netsuite.com/core/media/media.nl?id=190092736&c=NLCORP&h=2603acef11c8722dfcde&\\_xt=.xls](https://nlcorp.app.netsuite.com/core/media/media.nl?id=190092736&c=NLCORP&h=2603acef11c8722dfcde&_xt=.xls)

This can be found in Suite Answers by searching for “Permission Documentation”.



# Lists

---

You can customize the list view for most record types

- Update the results to see the data you need
- Update the order of the columns
- Update the sort order
- Add filters at the top

This works for most entity and transaction lists

Sub-lists also allow for customization

Note that the filters are “sticky” so the system remembers your filter.  
(can be problematic on transaction subtab)

# Lists

Use a saved search to create a list view you can publish.

- Check the box “Available as a list view”
- Update Roles Tab on Saved search to identify the roles for whom this is the preferred list view. Check the LIST box in the appropriate roles.

SEARCH TITLE \*


Customer Search for Accounting

ID

☐ PUBLIC

☒ AVAILABLE AS LIST VIEW

Criteria Results Highlighting Available Filters Audience **Roles** Email Audit Trail Ex

 Use this tab to make this search the preferred list view, search form, dashboard view, or sublist view, either globally (with the top checked list).

☐ PREFERRED SEARCH FORM

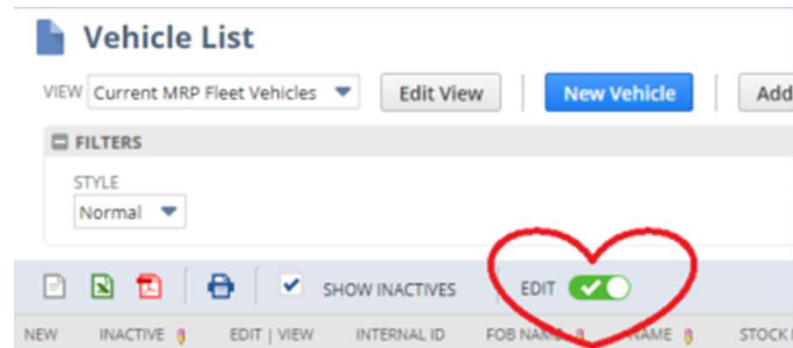
☐ PREFERRED SEARCH RESULTS

☒ PREFERRED LIST VIEW

LIST	FORM	RESULTS	DASHBOARD	SUBLIST	ROLE ▲
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	A/R Clerk
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Accountant
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Accountant (Reviewer)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Administrator
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bookkeeper

# Inline Editing

---



Any column that has a pencil can be edited right from the list.

Can select multiple using the CTRL or Shift Key to update at once.

You can even Delete multiple records at once!

# Print Checks and Forms

---

Transactions>Management>Print Checks and Forms

Most transactions have a “to be printed” option.  
This is defaulted from the Printing Preference selected on the entity  
(be careful if you select Email on the preference!)

Check print

- Back to Front option
- Go back to bill payment and re-check the Print Check box in order to re-print check. (may want to void if check stock was used)

Voucher print

- When your voucher details are too long for the voucher on the check stub
- Can select “Allow Reprinting” to see all vouchers

# Reporting Options

---

When to use one versus the other

- Reports
  - Hundreds of pre-configured reports
  - Subtotals and hierarchy make them “pretty”
  - Standard reports allow you to control filter and columns
  - Custom report layouts allow you to control the rows
  - Reports are smart enough to know the signs (debits and credits)
- Saved Searches
  - When you want to join tables and go directly at the data
  - Searches are very literal. They don't fix the signs for you.
  - When you want flat file results to export
  - When you want to create any of these:
    - KPI Dashboards
    - Custom Views
    - Custom Reminders
    - Email Alerts – Exception Reports
    - Scheduled Reports

# Financial Reporting – Detail customization

Do you find yourself adding columns to the detail report each time you click into it? You can save a custom detail report!

- Customize the detail report and save it with a new name
- Customize a summary report and update the More Options>Drill Down Report and select your custom detail. Then save this report with a new name.
- Now make it a shortcut so you can find it easily.

The screenshot shows the 'Financial Report Builder' interface for a 'CUSTOM INCOME STATEMENT'. It features a navigation bar with 'Edit Layout', 'Edit Columns', 'Filters', 'Sorting (Optional)', and 'More Options' (highlighted in yellow). Below the navigation bar, there is a 'NAME' field containing 'DLC Income Statement'. Under 'Additional Options', the 'Report Options' section includes checkboxes for 'CASH BASIS', 'SHOW ZEROS', 'ACTIVITY ONLY' (checked), 'SHOW ON REPORTS PAGE' (checked), and 'SHOW CURRENCY SYMBOL' (checked). There is an 'ID' field with the value 'CUSTOMREPORT'. The 'EXPAND LEVEL' is set to 'System Preference'. The 'DRILL DOWN REPORT' section is highlighted in yellow, and the selected option is 'DLC Income Statement Detail'.

# Reporting Options

---

## Suite Analytics Workbook - the latest (and greatest?)

- Create highly customizable workbooks that combine queries, pivot tables, and charts using a single tool.
- These workbooks use a new data source that was designed to ensure that fields are consistently exposed in SuiteAnalytics Workbook, with consistent results across all components of the workbook.
- Multilevel joins enables you to author workbooks using field data from multiple record types, including custom records.
- Custom formula fields allow you to create and add fields with dynamically calculated values to your workbooks.
- Display your hierarchical fields multiple ways, so you can easily view data for fields with parent-child relationships.

**Bottom line** – Workbooks are still a work in progress, but they show promise as a replacement for Saved Searches. It is NOT a replacement for financial reports!

# Questions?





**DANA LARSON**  
CONSULTING

# Thank You!

---

**DANA@DANALARSONCONSULTING.COM**