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NetSuite 101 :Back to Basics

Rocky Mountain NetSuite User Group
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Agenda

- General Navigation
- Reminders
- Preferences
- Global Search
- How to get Help
- Lists
- In-line editing
- Print Checks and Forms
- Overview on reporting options
  - Reports, Searches and Workbooks and when which option is better
  - Exporting results
  - Emailing reports on a schedule
  - Setting a default “detailed” report
- Export GL impact
- Popular Add Ins
- CSV Imports

General Navigation

Shortcuts

Quick Add

Recent Records

Personalize Dashboard

- Standard content
- Report Snapshots
- Trend Graphs
- Publishing Dashboard

Layout

Refresh manually

Global search then Edit directly

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)

CPE Question

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

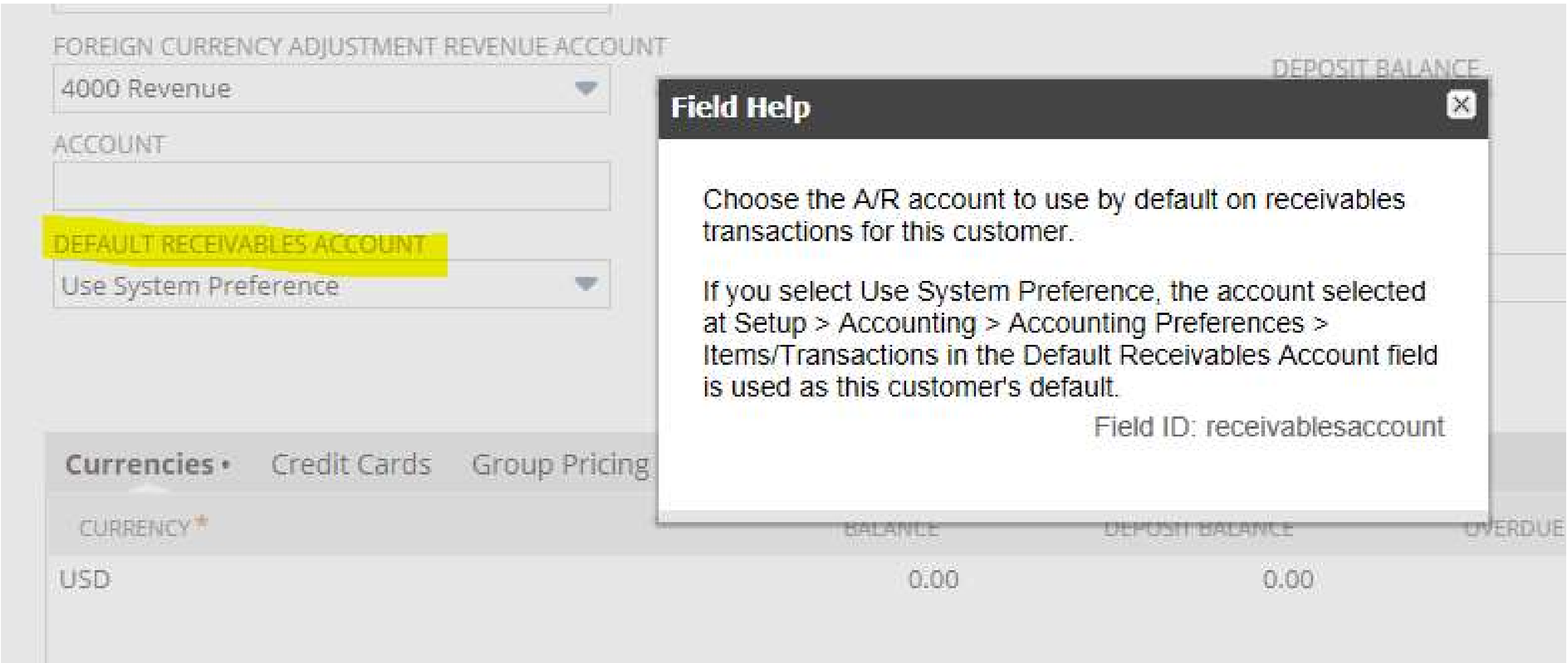
- By default, a single record returned by a global search opens in view mode. You can override this default by capitalizing the first letter of a search prefix. (This prefix has no effect when the *Show List When Only One Result* preference is enabled.)
- Note that you can also open a suggested matching 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.

CPE Question

Help! – Label Help

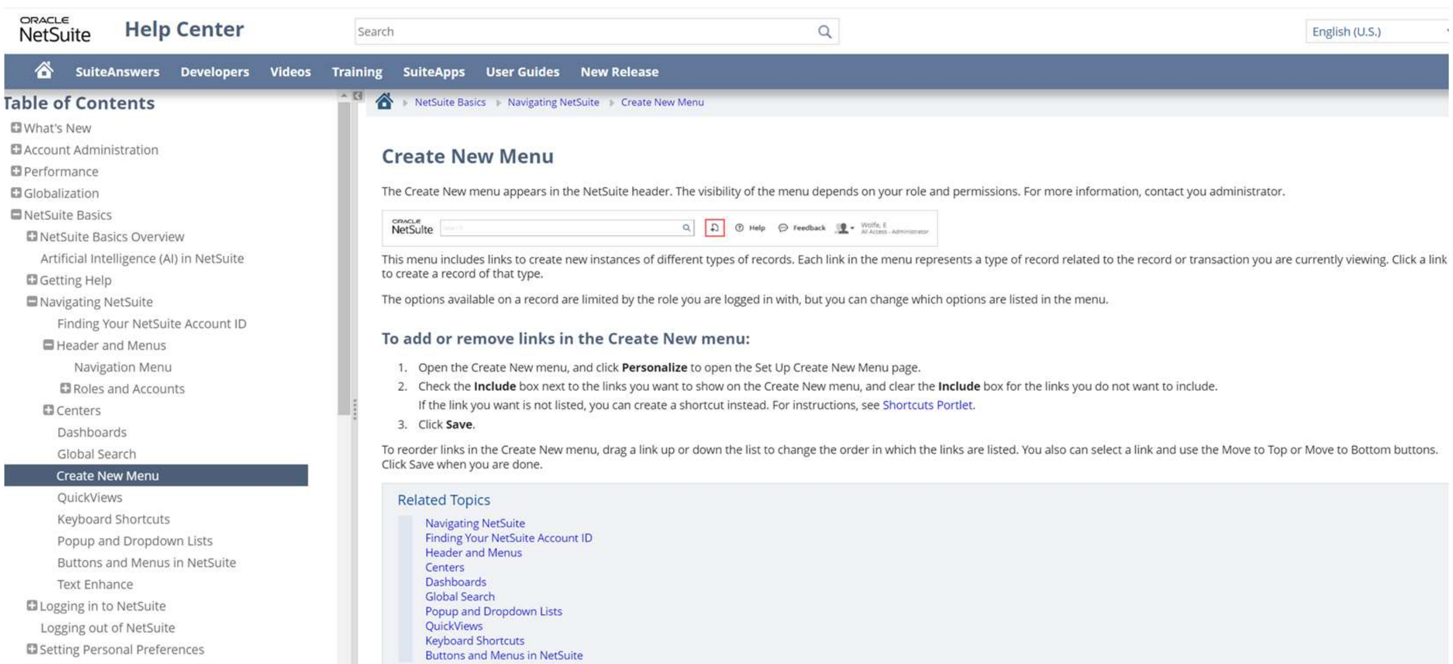
Don’t forget that you can click on the label of a field to get field level help (most of the time).

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



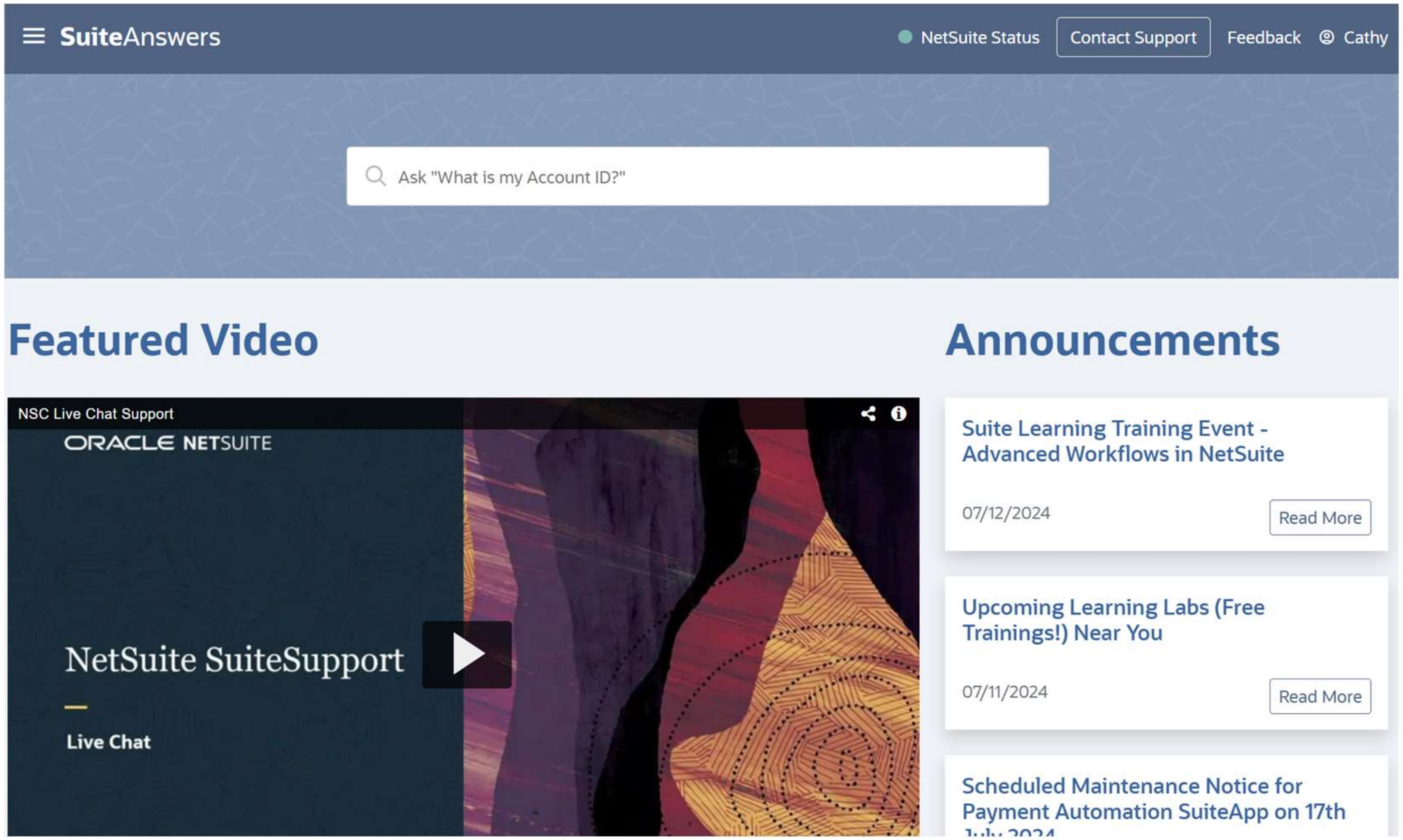
Help! – Help Center

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.



Help! – Support Tab

Support Tab>Go to Suite Answers



CPE Question

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
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

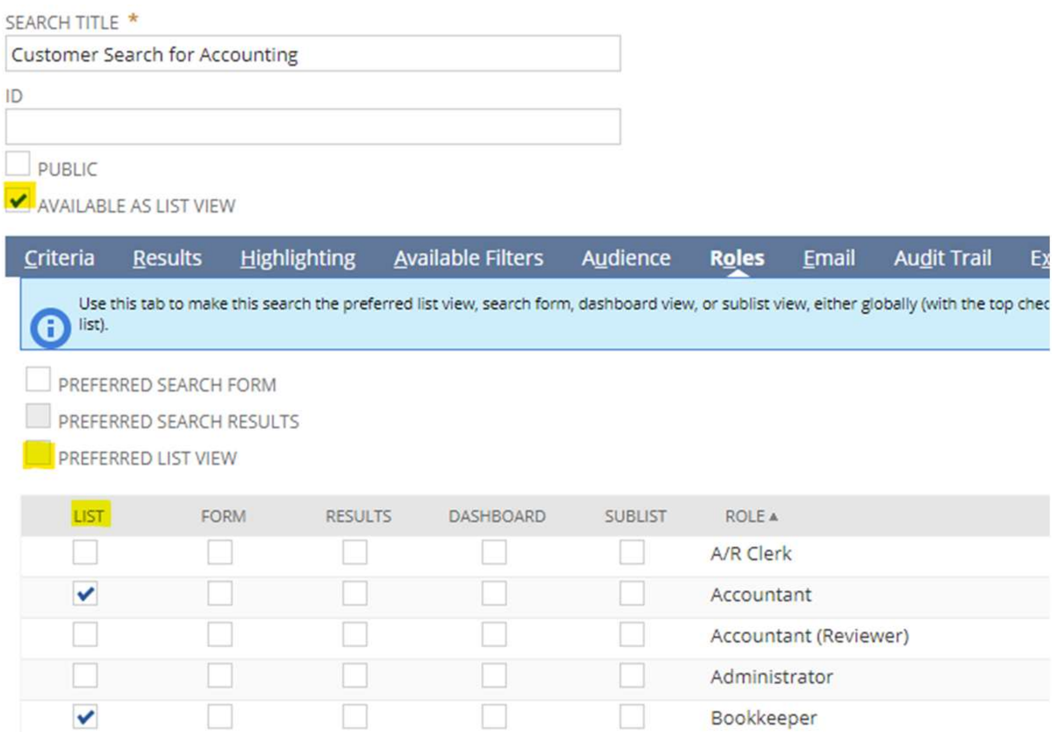
Sub-lists also allow for customization

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

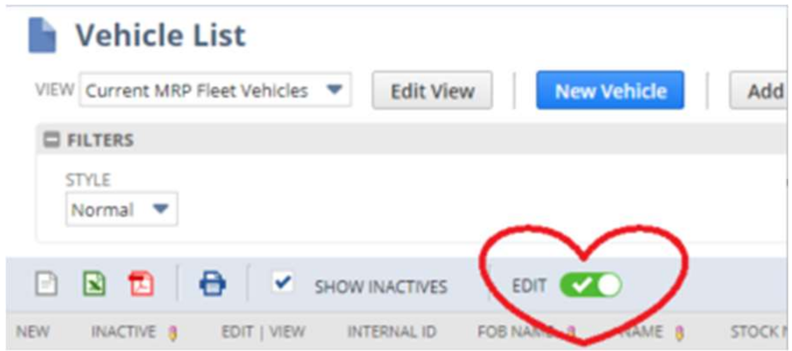
Lists

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.



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!

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CPE Question

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

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!

Financial Reporting – Exports

You can export your financial reports to

- CSV
- Excel
- PDF

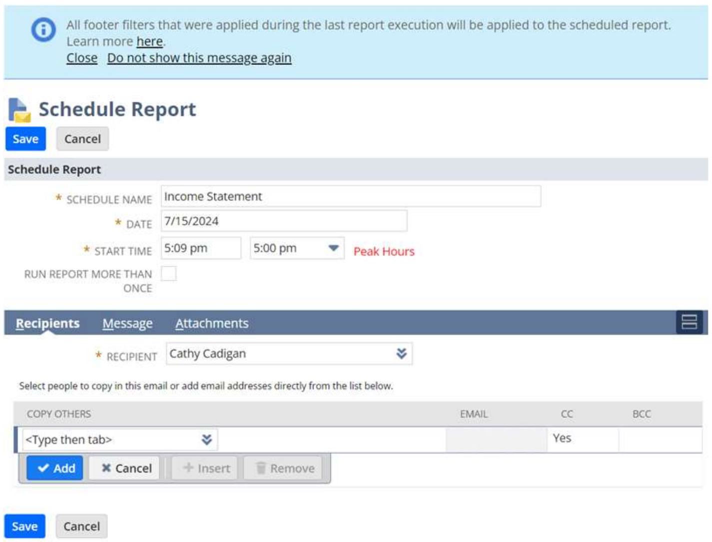
- Keep in mind that saving a bank rec as a PDF is a good idea so that you know it can't be altered like an excel file

- Hint – if you want a consolidated export, use the more options and change the expand level to collapsed. Then, when you export it, the rows won't just be hidden. They won't be there at all!

CPE Question

Email Reports on a Schedule

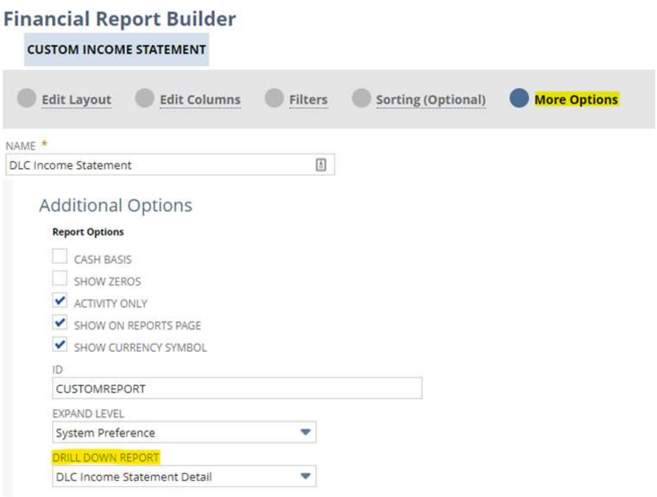
On the bottom right of most financial reports, you will see a envelope and a calendar. The envelope will allow you to email the report with a message and attachments. The calendar will allow you to schedule the report for one time or multiple times.



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.

Export GL Impact

- There is a convenient GL Impact tab now on most of the transactions so you can easily see the GL impact of the transaction. There is no export available there.

- Use the Actions drop down and select GL Impact to get to the GL Impact view that allows you to export it to CSV or Excel.

- This also works for any transactions that don't have the GL impact subtab.

CPE Question

Popular Bundles

You may want to explore these free add in bundles

- Sticky Notes - StickyNotes enables you to write private notes or share notes on records, transactions, or certain fields on a form across your colleagues. You can manage notes on a board where you can sort, filter, archive, delete, reply, or search while alternating between grid and sort views. A user noted the importance the creator of the note going in periodically and deleting the ones that were taken care of so they don't clog up the dashboard
- File Drag and Drop - File Drag and Drop enables you to upload single or multiple files from your desktop to the file cabinet or to a record page.
- Dashboard Navigation Portlet - SuiteSolutions - Navigations Portlets - enables dashboard portlets to organize frequently accessed menu links.
- Last Sales Activity - The Last Sales Activity SuiteApp lets you track the last sales activities performed for leads, prospects, customers, contacts, and opportunities. It can also track the last marketing campaign sent to leads, prospects, customers, and contacts.
- Subsidiary Navigator - With subsidiary navigator, management staff can quickly access metrics and performance in different subsidiaries for One World.

CPE Question

CSV Imports

Saved CSV imports tips and tricks

- Saved searches can be private or public. Switch to public on the saved search list view if needed.
- If you use "Save As" you need to update the id of the search also. Just add a character to the end of it.
- Column headers are case sensitive
- Can't use the # sign in the header
- Watch out for date issues
    - Dates sometimes flip to Julian
    - Posting Period formatting changes from Apr 2024 to Apr-2024. To get it back type an apostrophe before. Or use the custom format "MMM YYYY".

- Take a screen shot of mapping so you can refer to it if you have issues later.

CPE Question

Questions?

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Thank You!

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