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Pro Tips for Everyday NetSuite Users

Rocky Mountain NetSuite User Group
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CPE Learning Objectives

- Create and manage sublists within NetSuite records to organize and display related transaction data in a structured, accessible format.
- Edit records inline directly from list views without opening individual records, reducing data entry time for routine field updates.
- Execute mass updates across multiple records simultaneously to apply bulk field changes in compliance with organizational data governance policies.
- Configure and apply memorized transactions to automate recurring journal entries and other repeatable transaction types.
- Schedule automated delivery of saved searches and reports via email to distribute timely financial and operational data to stakeholders.

Agenda

- General Navigation
- Dashboard tips
- Preferences
- Lists and Sublists
- Inline editing
- Mass Updates
- Memorized Transactions
- Export GL impact
- Email reports on a schedule
- Saved Search tips

General Navigation

- Global search and go straight to Edit
- Open in new tab and close tabs
- Math in the amount field
- Tab to move between fields (shift tab to go backwards)
- CTRL+F
- Date shortcuts
 - T – tomorrow
 - t - today
 - Y/y – yesterday
 - M/m – last day of month
 - L/l – last day of previous month
 - + or – to increase or decrease by a day

CPE Requirement

Please be advised that in order to receive the 2 CPE credits, a minimum of 6 of the 8 questions must be answered

CPE Question 1

Dashboard Tips

- Recent Records
- Reminders
- Quick add for entity records
- Preferences
 - General Tab
 - Defaults
 - Show Internal IDs
 - Only show last...
 - Optimizing NetSuite
 - Number of rows in list segments
 - Maximum entries in dropdowns
 - Analytics Tab
 - Reporting
 - Report by Period
 - Default Bank account
 - Search
 - Show list when one result
 - Include Inactives

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

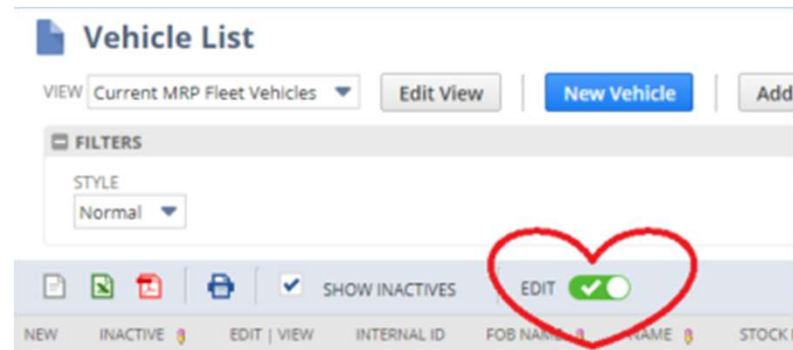
☐ PREFERRED SEARCH RESULTS

☒ PREFERRED LIST VIEW

LIST	FORM	RESULTS	DASHBOARD	SUBLIST	ROLE ▲
☐	☐	☐	☐	☐	A/R Clerk
☒	☐	☐	☐	☐	Accountant
☐	☐	☐	☐	☐	Accountant (Reviewer)
☐	☐	☐	☐	☐	Administrator
☒	☐	☐	☐	☐	Bookkeeper

CPE Question 2

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!

Custom Sublists

- Create a saved search that has a filter of the record to which you want to add the sublist. Add appropriate criteria and the results tab will be the columns in your sublist.

Saved Case Search

SUBLIST Cases for employees

[Save](#) [Cancel](#) [Preview](#) [New Template](#) [Change ID](#) [Actions](#)

SEARCH TITLE *

SUBLIST Cases for employees

ID

customsearch4684

OWNER

Dana Larson

☒ PUBLIC

☐ AVAILABLE FOR PUBLISHING ON WEBSITE

- ☐ AVAILABLE AS LIST VIEW
- ☐ AVAILABLE AS DASHBOARD VIEW
- ☒ AVAILABLE AS SUBLIST VIEW
- ☐ AVAILABLE FOR REMINDERS
- ☐ SHOW IN MENU

[Criteria](#) [Results](#) [Highlighting](#) [Available Filters](#) [Audience](#) [Roles](#) [Email](#) [Audit Trail](#) [Execution Log](#) [Search Title Translation](#)



Limit the set of filters available on the form when you reuse this search, or to set filters for the results (such as when used as a list view). Remove all filters to use advanced search.

☐ MY PREFERRED SEARCH FORM

☐ HIDE FILTER DROPDOWNS

DEFAULT TEXT FIELD FILTER

starts with

[Remove all](#)

[Add Multiple](#)

FILTER *

SHOW IN FILTER REGION

SHOW AS MULTI-SELECT

LABEL

Employee : Internal ID

Custom Sublists

- Then go to Customization>Forms>Sublists>New
- Add the tab, record type, search and Label and now it's a sublist!

Custom Sublist Definition

Cancel Save Delete Change ID Download XML

SCRIPT ID
custsublist_485_td3090876_765

TAB
Related Records

TYPE
Entity

SEARCH *
SUBLIST Cases for employees

LABEL *
Cases

FIELD
<Type then tab>

- ☐ DEPOSIT APPLICATION
☐ CUSTOMER
☐ JOB
☐ VENDOR
☒ EMPLOYEE
☐ PARTNER
☐ CONTACT

Access	Human Resources	Address	Communication	Related Records	Marketing	System Information	Custom	Time Tracking	Bank Payment Details	Demo Reference	Skills & Expertise
Transactions	Cases										
EDIT	NUMBER ▲	SUBJECT	COMPANY	STAGE	STATUS	PRIORITY					
Edit	CASE01	Printer Not Working	Consolidated Trucking Co.	Closed	Closed	Medium					
Edit	CASE02	Printer Not Working	Consolidated Trucking Co.	Escalated	Escalated	Medium					
Edit	CASE03	Monitor Return	Consolidated Trucking Co.	Open	In Progress	Medium					
Edit	CASE04	Laptop Slow	Consolidated Trucking Co.	Open	In Progress	High					

CPE Question 3

Mass Updates

- Don't forget about the mass update function. It can sometimes replace a csv update/import.
- Lists>Mass Update>Mass Updates will take you to a list of mass updates that are available. You can also save you own to use later.
- Choose the entity or transaction type you want to update
- Add Criteria to filter the list to those you want to update
- Go to the Mass Update Fields tab to enter what you want changed
- Preview the results
- Submit the mass update
- Not all fields are available so I also go to the Mass Update Fields tab first to confirm that it can update the field this way.

CPE Question 4

Memorized Transactions

- Most transactions can be memorized. Look in the Actions drop down while in EDIT mode on the transaction.
- Go to Transactions>Management>Enter Memorized Transactions>List to see what you have.
 - Automatic – good for transactions that are the same each month
 - Reminder – good for recurring transactions where you need to make a change (like a mortgage).
DON'T FORGET TO ADD THE REMINDER TO YOUR DASHBOARD
 - Template Only – good for an entry that you occasionally make
- Give a good name to the memorized transaction so you can find it when you need to.
- Gotchas: Stale source data. Scripts and workflows don't fire unless a setting is changed. Who inherits them when someone leaves?

CPE Question 5

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.

Email Reports on a Schedule

On the bottom right of most reports, you will see an 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.

 All footer filters that were applied during the last report execution will be applied to the scheduled report.
Learn more [here](#)
[Close](#) [Do not show this message again](#)

Schedule Report

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

Schedule Report

* SCHEDULE NAME

* DATE

* START TIME Peak Hours

RUN REPORT MORE THAN ONCE ☐

[Recipients](#) [Message](#) [Attachments](#)

* RECIPIENT

Select people to copy in this email or add email addresses directly from the list below.

COPY OTHERS	EMAIL	CC	BCC
<Type then tab>		Yes	

[Add](#) [Cancel](#) [Insert](#) [Remove](#)

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

CPE Question 6

Saved Search tips

- New bar shortcut
- Naming them
- Use the Search ID as a searchable field
- Filtering for them
- Go straight to export
- Gotcha: when an owner of a scheduled search is made inactive
- Quick filter: use Posting True
- Include search ID in scheduled emails
- **WARNING:** Overwrite Sublists really does that

CPE Question 7

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”.

Void transactions using Reversing JEs Setting

Direct Void

- ✓ Simple — transaction zeroes out
- ✓ Payment applications unwind automatically
- ✓ Clean bank rec & item reports
- ✗ Rewrites prior-period financials (if they aren't closed)
- ✗ Can't void in closed periods
- ✗ Weak audit trail / non-compliant in some jurisdictions

Void via Reversing JE

- ✓ Original period untouched — reports stay consistent
- ✓ Works with closed periods
- ✓ Full audit trail (compliance-friendly)
- ✗ Payments stay applied — manual cleanup
- ✗ Item reports & amortization don't reverse
- ✗ Two transactions in bank rec; users can pick a bad void date

Bottom line: Simplicity vs. financial integrity. If prior-period reports must tie out, use reversing JEs and train for the cleanup.

Random Tips and Tricks

- As of dating on Inventory and AR/AP aging
- Use Statistical Accounts (and Schedules) to log metrics that you would like to track over time, (i.e., headcount, backlog, etc.) since not everything is available for “as of” reporting. Create Custom KPIs to track values over time.
- Name the search in such a way that you know not to change it if it is used in a script or workflow – or if it’s scheduled!
- ALWAYS check this box: Accounting Preferences>General>General Ledger>Show All Transaction Types in Reconciliation.
- I also like Accounting Preferences>General>General Ledger>Expand Account Lists.
- URL shortcut for saved CSV import

CPE Question 8

And we close with AI

I asked Claude some questions while preparing for this. We were discussing memorized transactions and how to reconcile that they all went in. I asked “why don’t we just ask you”. He said when asked about the controls, "I ask Claude monthly" is a weaker answer than "a scheduled search emails me exceptions, and I use Claude to investigate them."

Deterministic control plus conversational investigation is the gold standard in my opinion!



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Thank You!

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