

THE POWER OF BEING UNDERSTOOD

AUDIT | TAX | CONSULTING



NETSUITE TIPS & TRICKS

Marc Bastnagel



Tip #1-4 – Keyboard Shortcuts

- Alt and type a letter to move to a subtab
- Math in amount fields (enter $20 + 30$) or $(100-70)/3$
- Tab to move between fields (shift tab to move backwards)
- Ctrl-F to find a value in a list or form

Tip #6 – Quick close accounting periods

- Close one or more accounting periods with a single click
- Enable in accounting preferences

Manage Accounting Periods

Set Up Full Year

New Year Only

New Quarter Only

Base Period

Close Multiple Periods

+ FILTERS



SHOW INACTIVES

INTERNAL ID

PERIOD NAME

+ EXPAND ALL | - COLLAPSE ALL

CHECKLIST

PERIOD CLOSE

35

+ FY 2015

1

+ FY 2016

18

- FY 2017

Tip #7 – File Drag & Drop

- Bundle ID – 41309
- Drag and drop files to a NetSuite record
- Configure default folder rules

← → List View Dashboard Search Customize More

File Drag and Drop
Launch the File Drag and Drop Tutorial to learn more about the feature.

[Launch Tutorial](#) [Close](#)

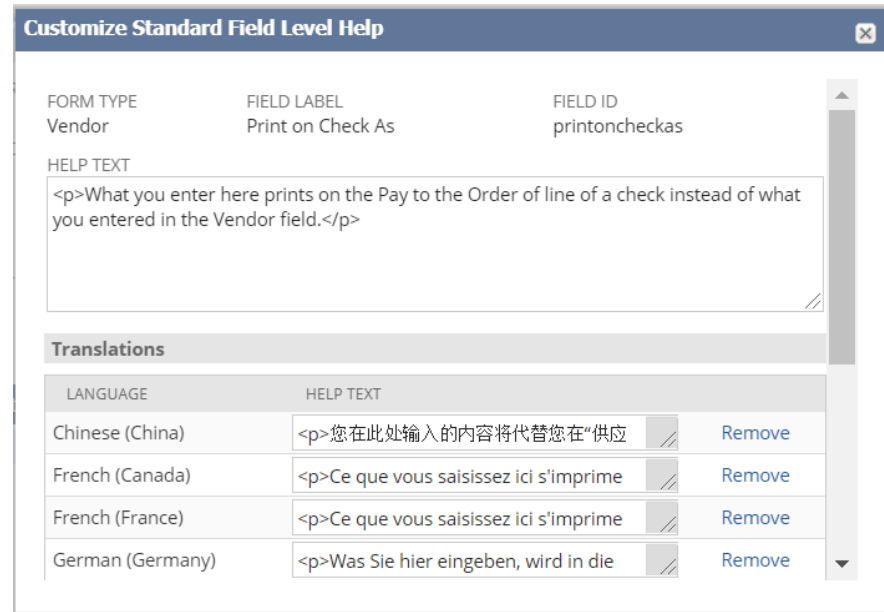
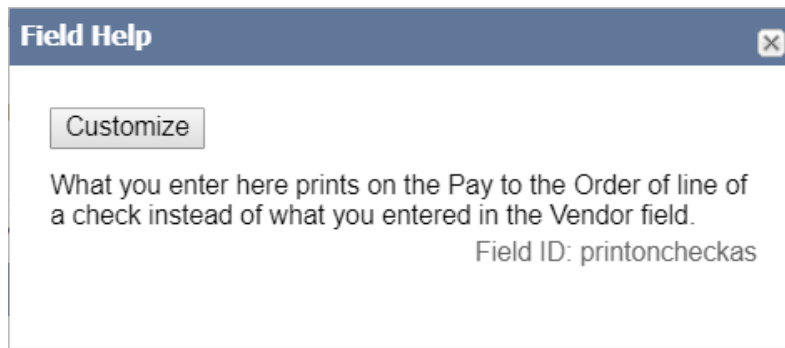
Don't show this message again



CUSTOM FORM

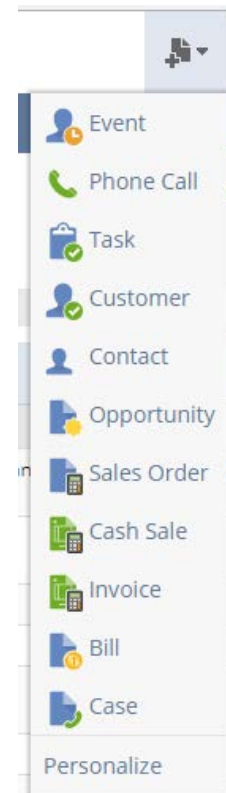
Tip #8 – Customize field level help for standard fields

- Select customize from the field level help:



Tip #9 – Use the Create New menu

- Quick link to create new records



Tip #10 – Maximize User Preferences

- Number of rows in lists segments
- Maximum entries in dropdowns
- Show internal ids
- Configure NetSuite email signature
- Change color theme
- Auto fill transactions
- Alphabetize items regardless of type
- Show list when only 1 row result

Tip #11 - SuiteSolutions

- Advanced Approvals
- Shared Vendor Bills
- Consolidated Invoicing
- Credit Card Re-Authorization
- Rebate Management
- Pay When Paid
- Vendor Prepayments
- Lot Traceability
- Effective Dated Pricing
- AR Deduction and Chargeback Management
- Project from Opportunity

Tip #12 – User Shortcuts & Recent Records

- Shortcuts for commonly used functions. (Star:)



- Link to the records mostly recently viewed. (Clock:)



- Or display on your dashboard

Tip #13 – Date Shortcuts

- t - today
- y - yesterday
- m - last day of month
- l - last day of previous month
- + increases by one day and – decreases by one day

Tip #14 - Global Search Prefixes

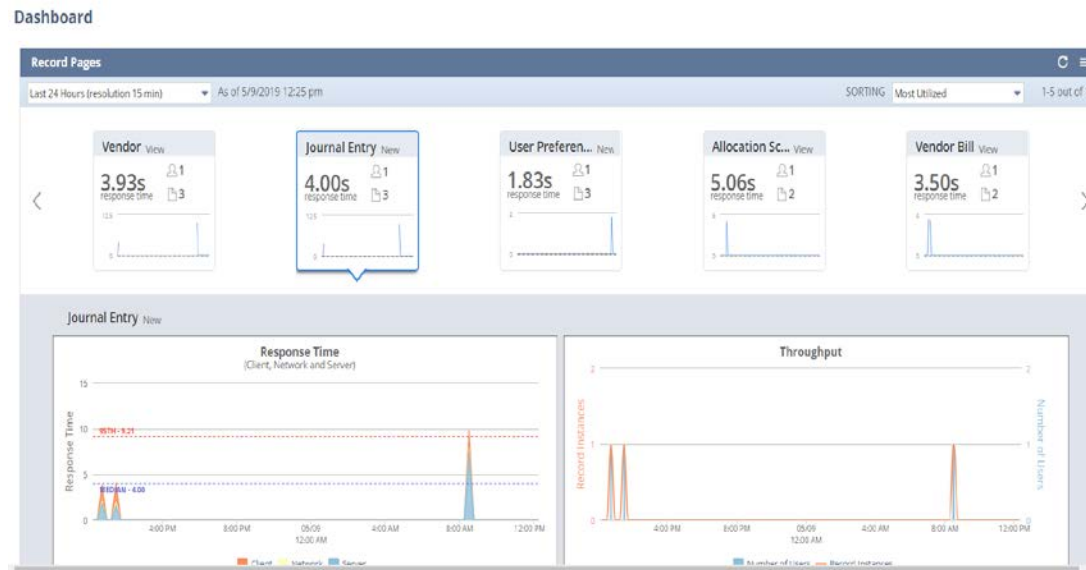
Prefix	Action
cus:	Returns only customer records. <i>Example: cus:smith</i> locates all customer records with Smith within its name.
v:	Returns only vendor records. <i>Example: v:Alpha</i> locates all vendor records with Alpha within its name.
sa:	Returns only sales order records. <i>Example: sa:76700</i> locates that specific record.
inv:	Returns only invoice records. <i>Example: inv:1152</i> locates that specific record.
pu:	Returns only purchase order records. <i>Example: pu:12900</i> locates that specific purchase order record.
con:	Returns only contact records. <i>Example: con:jones</i> locates all contact records with Jones within its name.
pa:	Returns a list of NetSuite pages. <i>Example: pa: sales orders</i> locates all reports and NetSuite pages containing 'sales order'
help:	Opens the NetSuite Help Centre and returns a list of help topics <i>Example: help:bank rec</i> locates all help documents for bank rec
sea:	Returns only saved search records. <i>Example: sea:open sales</i> locates all saved searches with open sales within its name.

Tip #15 - Global Search Tips

- percentage % before and after a word to find anything that contains that word
- underscore _ replaces any letter
- quotation marks "" for exact text matches

Tip #16 – NetSuite Performance Management

- Application Performance Management SuiteApp
- Status.netsuite.com



Q&A

RSM US LLP
www.rsmus.com

This document contains general information, may be based on authorities that are subject to change, and is not a substitute for professional advice or services. This document does not constitute audit, tax, consulting, business, financial, investment, legal or other professional advice, and you should consult a qualified professional advisor before taking any action based on the information herein. RSM US LLP, its affiliates and related entities are not responsible for any loss resulting from or relating to reliance on this document by any person.

RSM US LLP is a limited liability partnership and the U.S. member firm of RSM International, a global network of independent audit, tax and consulting firms. The member firms of RSM International collaborate to provide services to global clients, but are separate and distinct legal entities that cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party. Visit rsmus.com/aboutus for more information regarding RSM US LLP and RSM International.

RSM® and the RSM logo are registered trademarks of RSM International Association. The power of being understood® is a registered trademark of RSM US LLP.

© 2015 RSM US LLP. All Rights Reserved.