NETSUITE ROLES, CENTERS, AND DASHBOARDS

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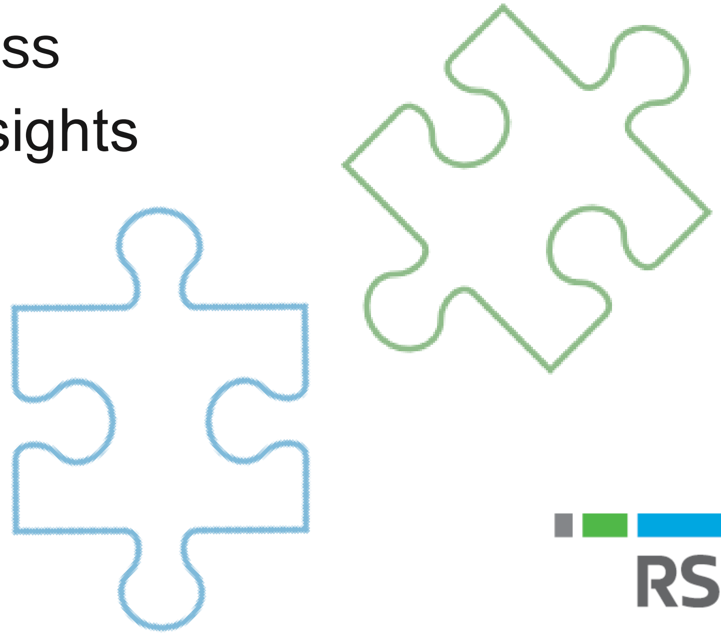
About This Course

This presentation will discuss how to manage roles, including adding, updating and overseeing permissions, creating custom centers, and building and managing dashboards.

I will demonstrate how to:

- Create and update custom roles and their permissions
- Build custom centers with tabs, categories, and links
- Obtain real-time and actionable insight into your business
- Create “smart” dashboards to drive true, operational insights

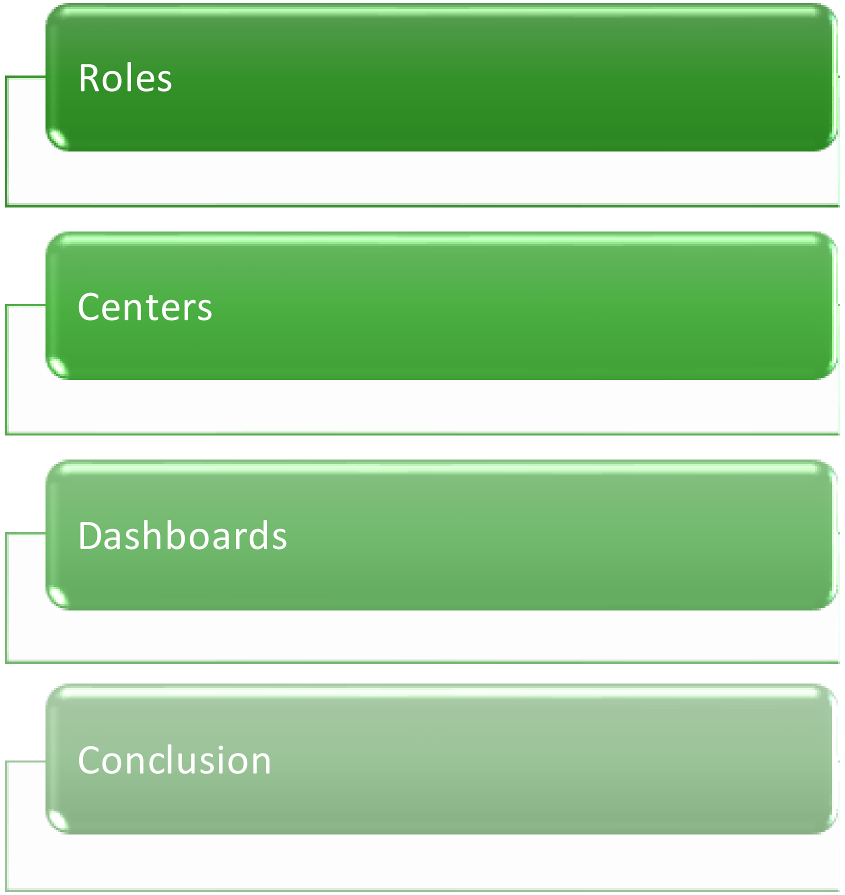


Objectives

1. Update roles to give users the autonomy to complete tasks
2. Create custom centers for ease of training and collaboration
3. Tailor dashboards to user roles for immediate information delivery
4. Share general best practices to keep your business running efficiently

Agenda

- Roles
  - Editing & Updating Roles
  - Adding Permissions
- Centers
  - Creating a Custom Center
- *10 Minute Break*
- Dashboards
  - Customizing and Publishing Dashboards
  - Executive Dashboard
  - Accounting Dashboard
- Conclusion



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ROLES

A ROLE IS AN ACCESS CONFIGURATION DEFINING WHAT PAGES AND RECORDS A USER CAN SEE

Roles Best Practices

1. Customize standard roles
2. Assign custom roles to users
3. Grant the lowest necessary permission level

PERMISSIONS GOVERN THE DATA AND INTERFACE THAT USERS CAN ACCESS

Permission Types

- Transactions
- Setup
- Reports
- Custom Records
- Lists

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Permission Levels

- View
- Create
- Edit
- Full

Roles Tips & Tricks

1 Copying roles

2 Show Role Differences page

3 SAML Single Sign-On Permissions

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Walkthrough: Editing Role Permissions

Salesperson cannot access Invoices

- Use Case/Scenario:
  - A Salesperson requires access to Invoices
  - Need to grant role permission to view Invoice records
  - Give the lowest permission level that allows a user to complete their tasks

CENTERS

A CENTER IS A CONFIGURATION OF NETSUITE CREATED FOR A GROUP OF ROLES WITH SIMILAR TASKS

To Customize Centers…

Enable Features

Save Cancel

Subsidiary Feature: After enabling this feature, you must enable and set preferences for individual subsidiaries using the Subsidiary Settings Manager.

Company Accounting Tax Transactions Items & Inventory Employees CRM Analytics Web Presence **SuiteCloud**

VIEW SUITECLOUD TERMS OF SERVICE. TRANSLATIONS OF THE SUITECLOUD TERMS OF SERVICE ARE ALSO AVAILABLE ON THE ORACLE NETSUITE WEBSITE.

SuiteBuilder

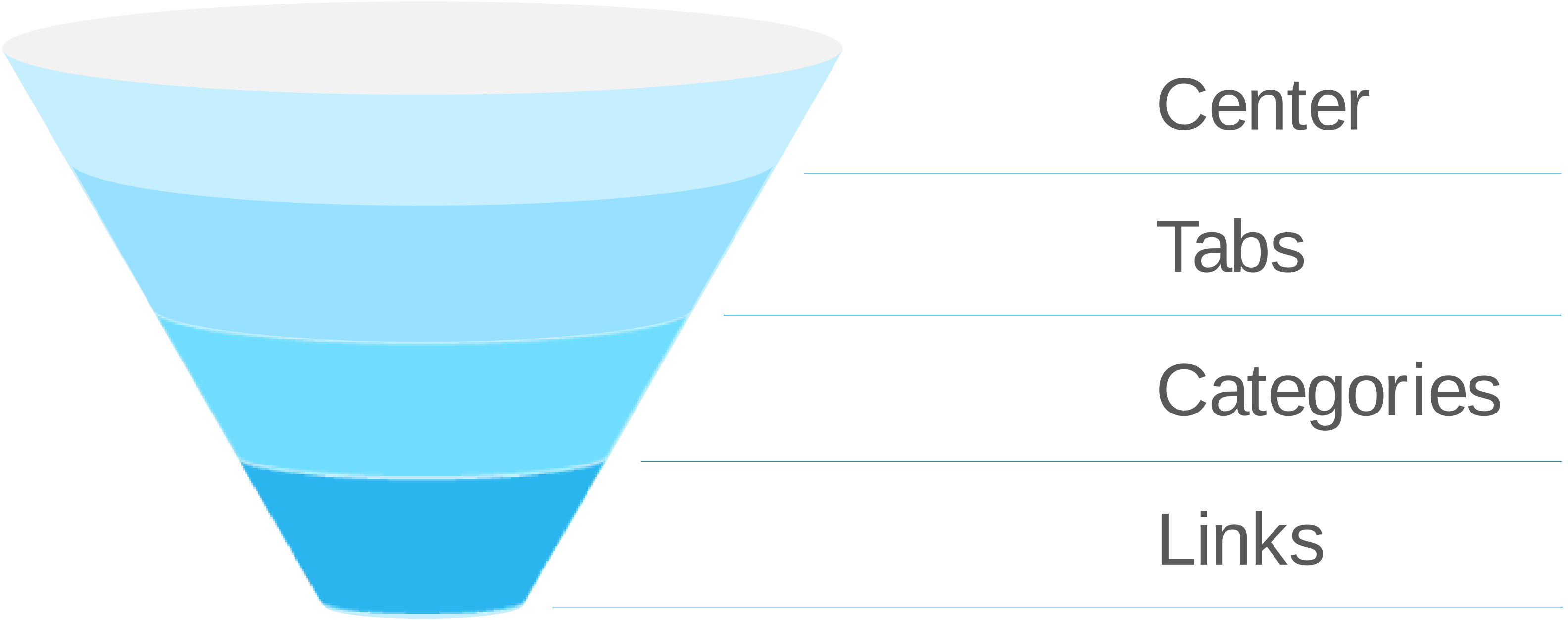
- [x] ITEM OPTIONS

ASSIGN CUSTOM TRANSACTION ITEM OPTION FIELDS TO THE LINE ITEMS OF YOUR TRANSACTION RECORDS. BY ENABLING THIS FEATURE, YOU AGREE TO SUITECLOUD TERMS OF SERVICE.

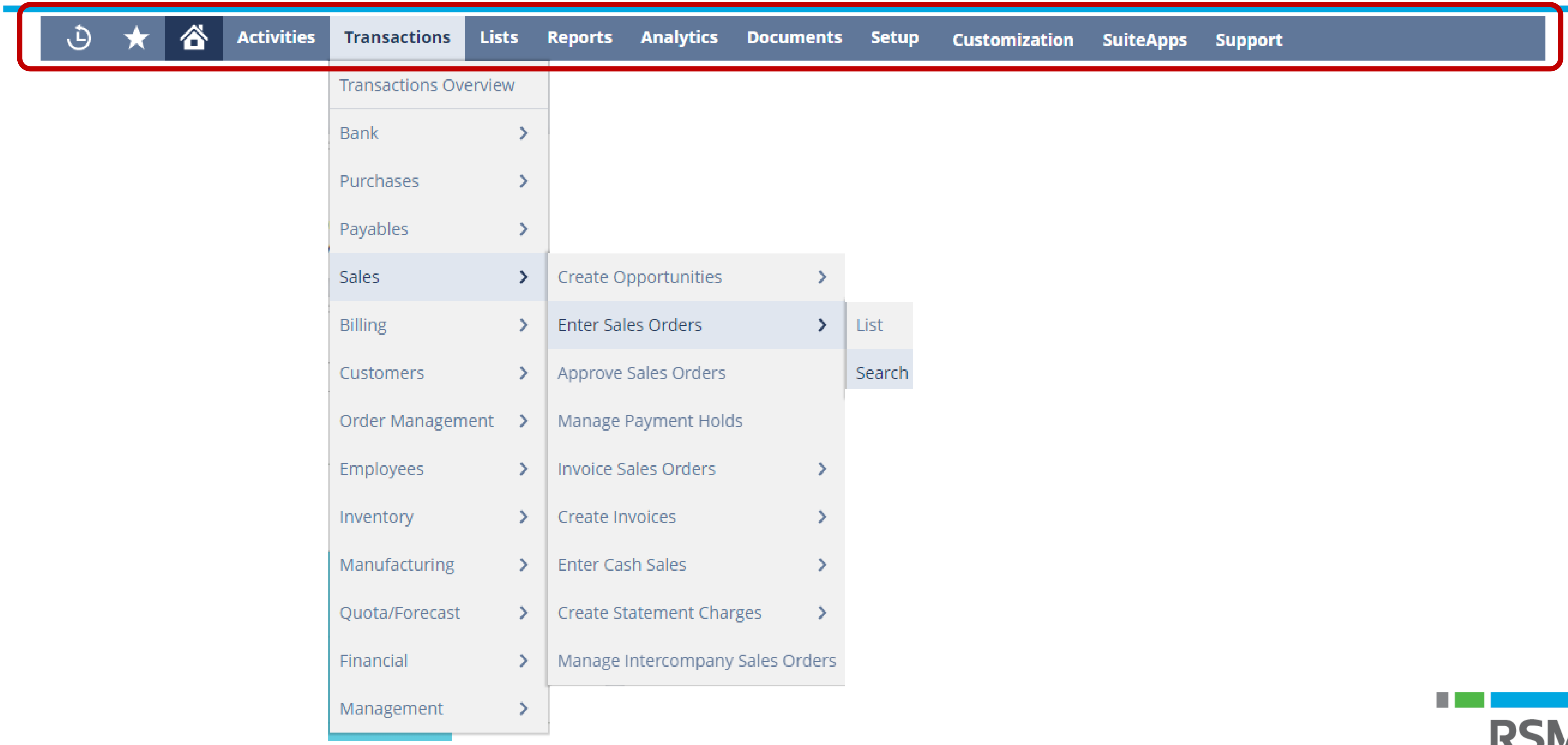
- [x] CUSTOM RECORDS

COLLECT INFORMATION SPECIFIC TO YOUR BUSINESS THAT CAN BE INTEGRATED WITH STANDARD NETSUITE RECORDS. BY ENABLING THIS FEATURE, YOU AGREE TO SUITECLOUD TERMS OF SERVICE.

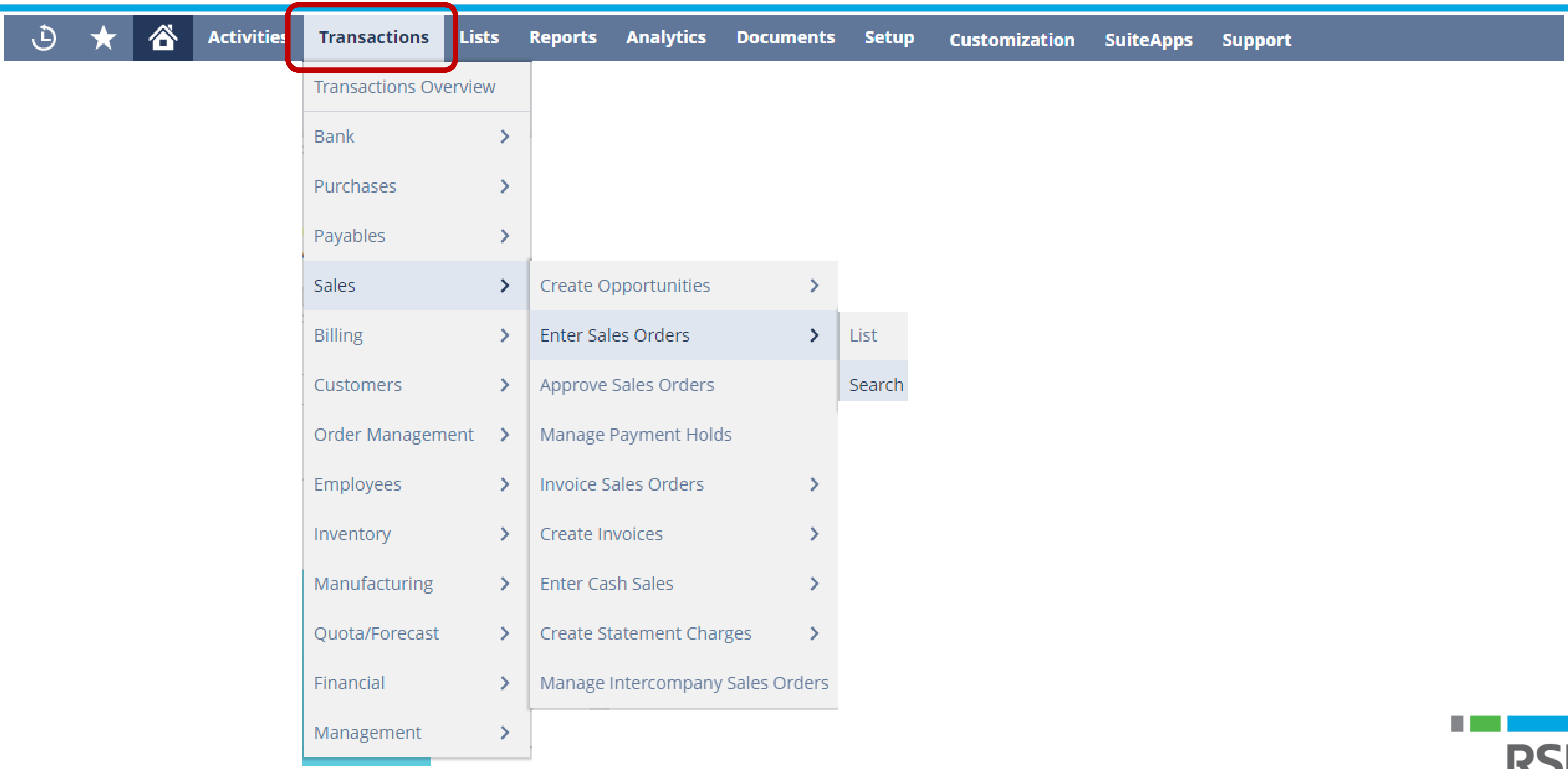
Consumer Strategy



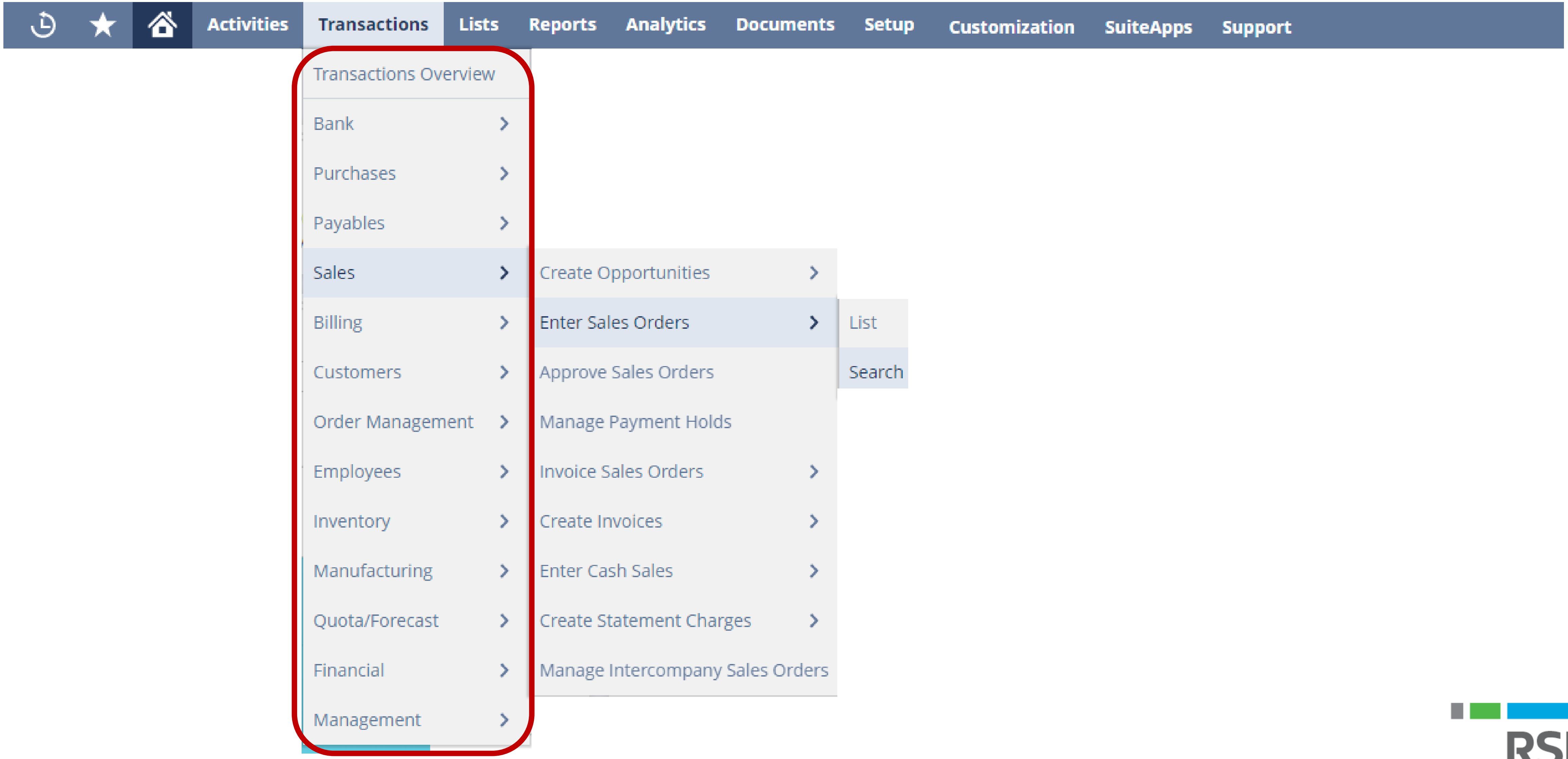
Centers Hierarchy – Center



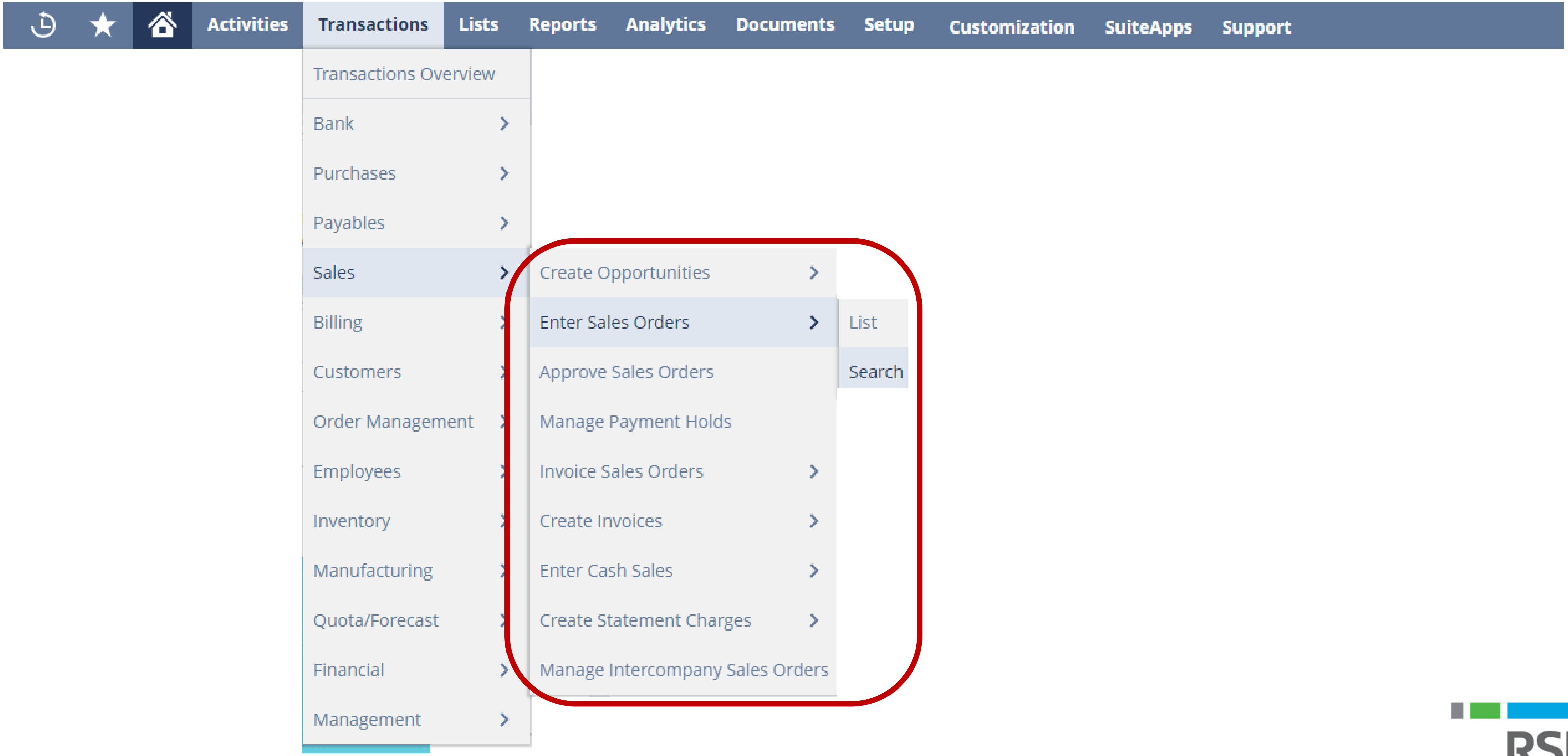
Centers Hierarchy – Tabs



Centers Hierarchy – Categories



Centers Hierarchy – Links



Walkthrough: Creating a Custom Center

You want a custom Accounting Center

- Use Case/Scenario:
  - You want accountants to only have financial related tabs rather than the Classic Interface

Centers Best Practices

1. Assign a Center when creating a new Role
2. Set preferences to Classic Interface
3. Add new Tabs, Categories, Links, and Scorecards to the Classic Centers
4. Add a custom Tab for ease of access to custom reports

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Walkthrough: Adding a Custom Tab & Categories to the Classic Interface

You want a custom Tab designated to Sales

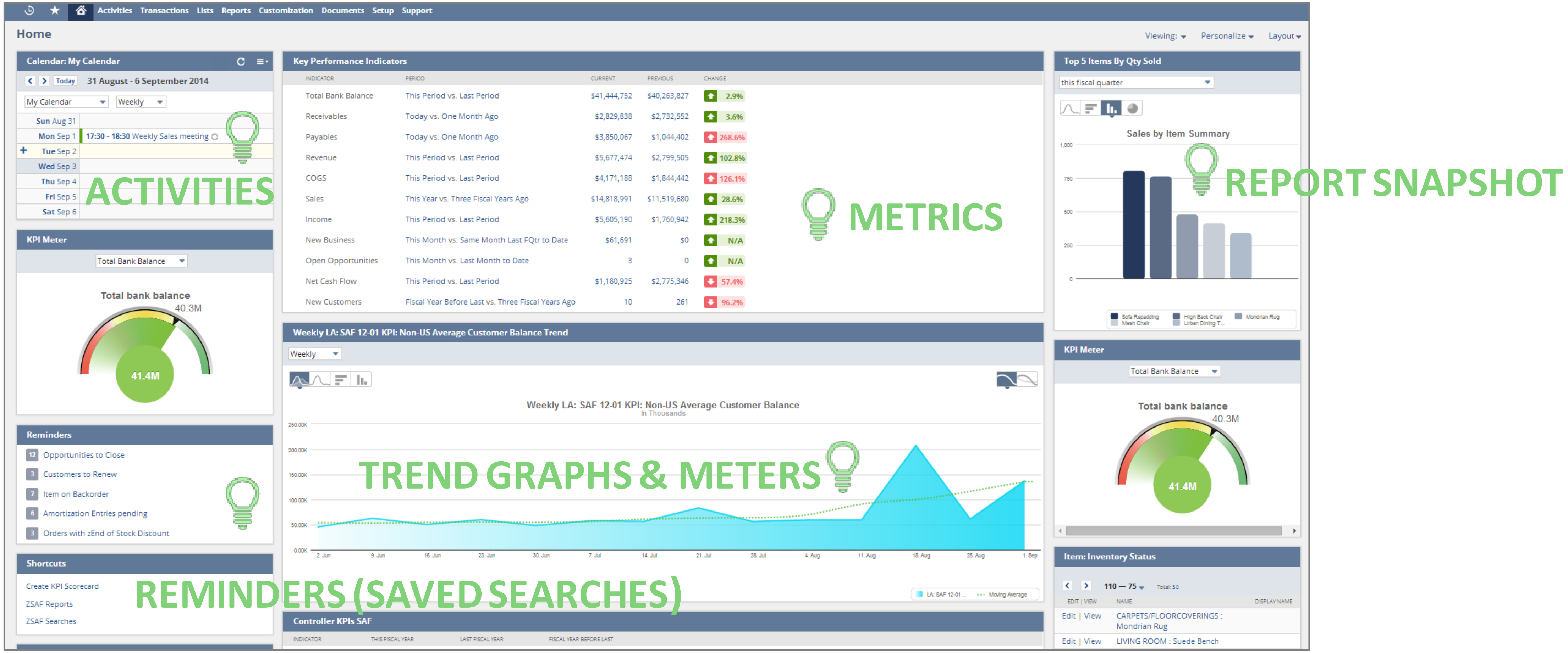
- Use Case/Scenario:
  - You want all sales related pages to be more accessible
  - Since all users are using the Classic Interface, we want to add a new tab to that center rather than create a custom center

BREAK

DASHBOARDS

Dashboards can display real-time data, leveraging off saved searches and reports

Home Dashboard Overview



Common Dashboard Portlets

- Custom Search
- Trend Graphs
- KPI Meter
- Reminders
- Key Performance Indicators
- Report Snapshots
- KPI Scorecard

Publishing Dashboards

1. Publish Dashboards permission
2. Personalize the Dashboard
3. Publish the Dashboard

Dashboard Personalization

Locked Mode

Add / Move Content Mode

Unlocked Mode

Walkthrough: Creating and Publishing Dashboard Portlets

Create an Executive and Accounting Dashboard

- Use Case/Scenario:
  - The CEO wants two different dashboards for the users within their NetSuite instance:
    - An Accounting Dashboard
    - And an Executive Dashboard

CONCLUSION

Time Well Spent!

1	ROLES	Create custom roles Edit & update permissions
2	CENTERS	Create custom centers
3	DASHBOARDS	Create & publish dashboards Accounting & Executive dashboards

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THANK YOU FOR YOUR TIME AND ATTENTION

QUESTIONS AND ANSWERS?