

NETSUITE ROLES, CENTERS, AND DASHBOARDS

Presented by: Alexis Matson

November 17, 2021



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

Roles

Centers

Dashboards

Conclusion



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

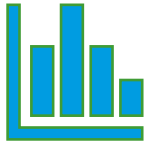
Permission Types



Transactions



Setup



Reports



Custom Records



Lists

Permission Levels

View



Create



Edit



Full



Roles Tips & Tricks

1

Copying roles

2

Show Role Differences page

3

SAML Single Sign-On Permissions



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

 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

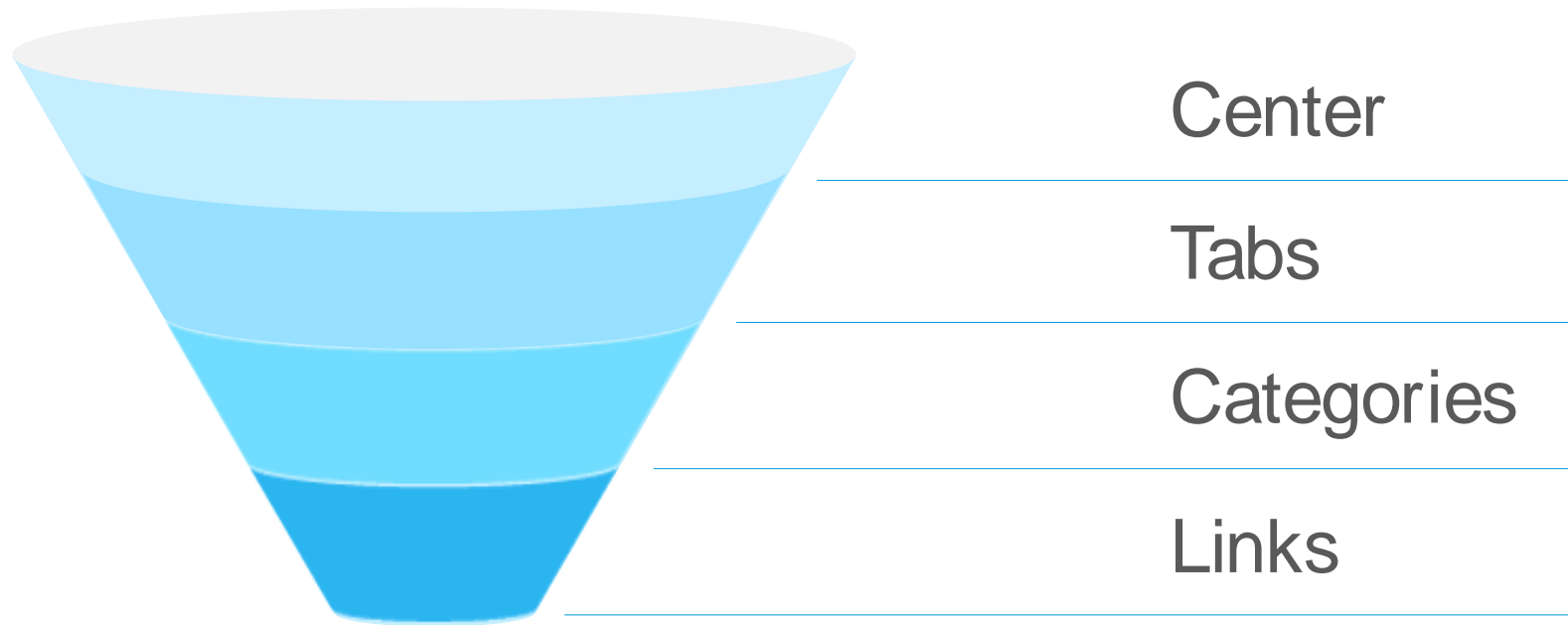
ITEM OPTIONS

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](#).

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

The screenshot displays a navigation bar with the following items: Home, Activities, Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, SuiteApps, and Support. The 'Transactions' menu is expanded, showing the following hierarchy:

- Transactions Overview
- Bank >
- Purchases >
- Payables >
- Sales >
 - Create Opportunities >
 - Enter Sales Orders > List
 - Approve Sales Orders Search
 - Manage Payment Holds
 - Invoice Sales Orders >
 - Create Invoices >
 - Enter Cash Sales >
 - Create Statement Charges >
 - Manage Intercompany Sales Orders
- Customers >
- Order Management >
- Employees >
- Inventory >
- Manufacturing >
- Quota/Forecast >
- Financial >
- Management >

Centers Hierarchy – Tabs

The screenshot displays a software interface with a dark blue navigation bar at the top. The bar contains several tabs: 'Activities', 'Transactions', 'Lists', 'Reports', 'Analytics', 'Documents', 'Setup', 'Customization', 'SuiteApps', and 'Support'. The 'Transactions' tab is highlighted with a red rectangular border. Below the 'Transactions' tab, a sub-menu is expanded, listing various transaction types and actions. The sub-menu items are: 'Transactions Overview', 'Bank', 'Purchases', 'Payables', 'Sales', 'Billing', 'Customers', 'Order Management', 'Employees', 'Inventory', 'Manufacturing', 'Quota/Forecast', 'Financial', and 'Management'. Each item has a right-pointing chevron. The 'Sales' item is further expanded, showing sub-items: 'Create Opportunities', 'Enter Sales Orders', 'Approve Sales Orders', 'Manage Payment Holds', 'Invoice Sales Orders', 'Create Invoices', 'Enter Cash Sales', 'Create Statement Charges', and 'Manage Intercompany Sales Orders'. The 'Enter Sales Orders' sub-item has its own sub-menu with 'List' and 'Search' options.

Level	Item	Action
Root	Transactions	Expanded
Level 1	Transactions Overview	
Level 1	Bank	>
Level 1	Purchases	>
Level 1	Payables	>
Level 1	Sales	>
Level 1	Billing	>
Level 1	Customers	>
Level 1	Order Management	>
Level 1	Employees	>
Level 1	Inventory	>
Level 1	Manufacturing	>
Level 1	Quota/Forecast	>
Level 1	Financial	>
Level 1	Management	>
Level 2 (under Sales)	Create Opportunities	>
Level 2 (under Sales)	Enter Sales Orders	>
Level 2 (under Sales)	Approve Sales Orders	
Level 2 (under Sales)	Manage Payment Holds	
Level 2 (under Sales)	Invoice Sales Orders	>
Level 2 (under Sales)	Create Invoices	>
Level 2 (under Sales)	Enter Cash Sales	>
Level 2 (under Sales)	Create Statement Charges	>
Level 2 (under Sales)	Manage Intercompany Sales Orders	
Level 3 (under Enter Sales Orders)	List	
Level 3 (under Enter Sales Orders)	Search	

Centers Hierarchy – Categories

The screenshot displays a software interface with a top navigation bar containing icons for home, star, and refresh, followed by menu items: Activities, Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, SuiteApps, and Support. The 'Transactions' menu is expanded, showing a list of categories: Transactions Overview, Bank, Purchases, Payables, Sales, Billing, Customers, Order Management, Employees, Inventory, Manufacturing, Quota/Forecast, Financial, and Management. The 'Sales' category is further expanded to show sub-items: Create Opportunities, Enter Sales Orders, Approve Sales Orders, Manage Payment Holds, Invoice Sales Orders, Create Invoices, Enter Cash Sales, Create Statement Charges, and Manage Intercompany Sales Orders. The 'Enter Sales Orders' sub-item has a 'List' button, and 'Approve Sales Orders' has a 'Search' button. A red rounded rectangle highlights the 'Transactions' category and its sub-items.

Category	Sub-Item	Action
Transactions Overview		
Bank		>
Purchases		>
Payables		>
Sales	Create Opportunities	>
Billing	Enter Sales Orders	> List
Customers	Approve Sales Orders	Search
Order Management	Manage Payment Holds	
Employees	Invoice Sales Orders	>
Inventory	Create Invoices	>
Manufacturing	Enter Cash Sales	>
Quota/Forecast	Create Statement Charges	>
Financial	Manage Intercompany Sales Orders	
Management		>

Centers Hierarchy – Links

The screenshot shows a navigation bar with the following items: Activities, Transactions, Lists, Reports, Analytics, Documents, Setup, Customization, SuiteApps, and Support. The Transactions menu is expanded, showing a list of categories: Transactions Overview, Bank, Purchases, Payables, Sales, Billing, Customers, Order Management, Employees, Inventory, Manufacturing, Quota/Forecast, Financial, and Management. The Sales category is expanded into a sub-menu with the following items: Create Opportunities, Enter Sales Orders, Approve Sales Orders, Manage Payment Holds, Invoice Sales Orders, Create Invoices, Enter Cash Sales, Create Statement Charges, and Manage Intercompany Sales Orders. A red rounded rectangle highlights the Sales sub-menu. The 'Enter Sales Orders' item in the sub-menu has a 'List' button next to it, and the 'Approve Sales Orders' item has a 'Search' button next to it.

Category	Item	Action
Transactions	Transactions Overview	
Transactions	Bank	>
Transactions	Purchases	>
Transactions	Payables	>
Transactions	Sales	>
Transactions	Billing	>
Transactions	Customers	>
Transactions	Order Management	>
Transactions	Employees	>
Transactions	Inventory	>
Transactions	Manufacturing	>
Transactions	Quota/Forecast	>
Transactions	Financial	>
Transactions	Management	>
Sales (Sub-menu)	Create Opportunities	>
Sales (Sub-menu)	Enter Sales Orders	> List
Sales (Sub-menu)	Approve Sales Orders	Search
Sales (Sub-menu)	Manage Payment Holds	
Sales (Sub-menu)	Invoice Sales Orders	>
Sales (Sub-menu)	Create Invoices	>
Sales (Sub-menu)	Enter Cash Sales	>
Sales (Sub-menu)	Create Statement Charges	>
Sales (Sub-menu)	Manage Intercompany Sales Orders	

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

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





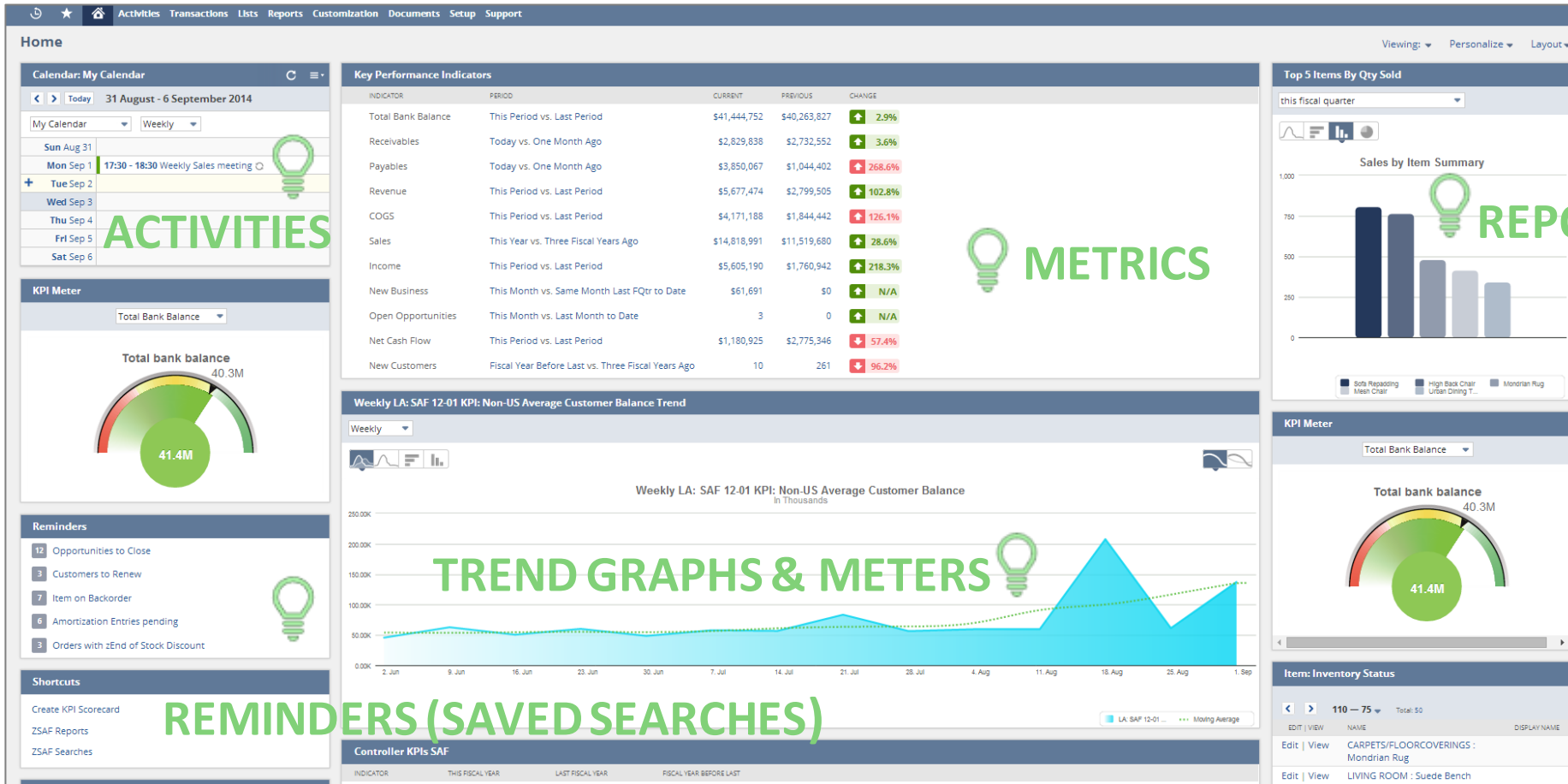
BREAK



DASHBOARDS

DASHBOARDS CAN DISPLAY REAL-TIME DATA,
LEVERAGING OFF SAVED SEARCHES AND REPORTS

Home Dashboard Overview



ACTIVITIES

METRICS

REPORT SNAPSHOT

TREND GRAPHS & METERS

REMINDERS (SAVED SEARCHES)

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



THANK YOU FOR
YOUR TIME AND
ATTENTION



QUESTIONS AND ANSWERS?