



How to be a Great NetSuite Administrator



Presenters



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Senior Manager, Cloud Solutions
Bridgepoint Consulting

Background

- NetSuite Implementation and Business Process Design
- 10+ years of client service
- Auditor & Consultant at top 20 Public Accounting Firm
- Experience with software, services, government, retail, non-profit, oil & gas, and banking industries
- B.S. Finance and Accounting & Master's Degree in Accounting, University of Northern Colorado



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Background

- Oracle Fusion ERP, NetSuite
- 6 years Business Transformation and NetSuite Consulting
- End-to-End NetSuite Implementations
- B.S. Finance, Ohio State University

Agenda



Maximizing your Investment of NetSuite through Administrator Function



Understanding the Role of a NetSuite Administrator



Key Functions & Best Practices



Issue Management & Monitoring



Continuous Learning & Professional Development



Tips & Tricks for NetSuite Administrators

Maximizing your investment of NetSuite through Administrator function

- Optimize NS License Cost
- User Efficiency
- Continuous Improvement

Optimizing NetSuite Without Affecting License Cost

Majority of the topics covered in this presentation do not have an impact to the overall NetSuite License Cost

Improvements to the system are readily available by enabling features and performing configuration

Semi-Annual releases are included in the license cost, and can have a material impact on the job efficiency

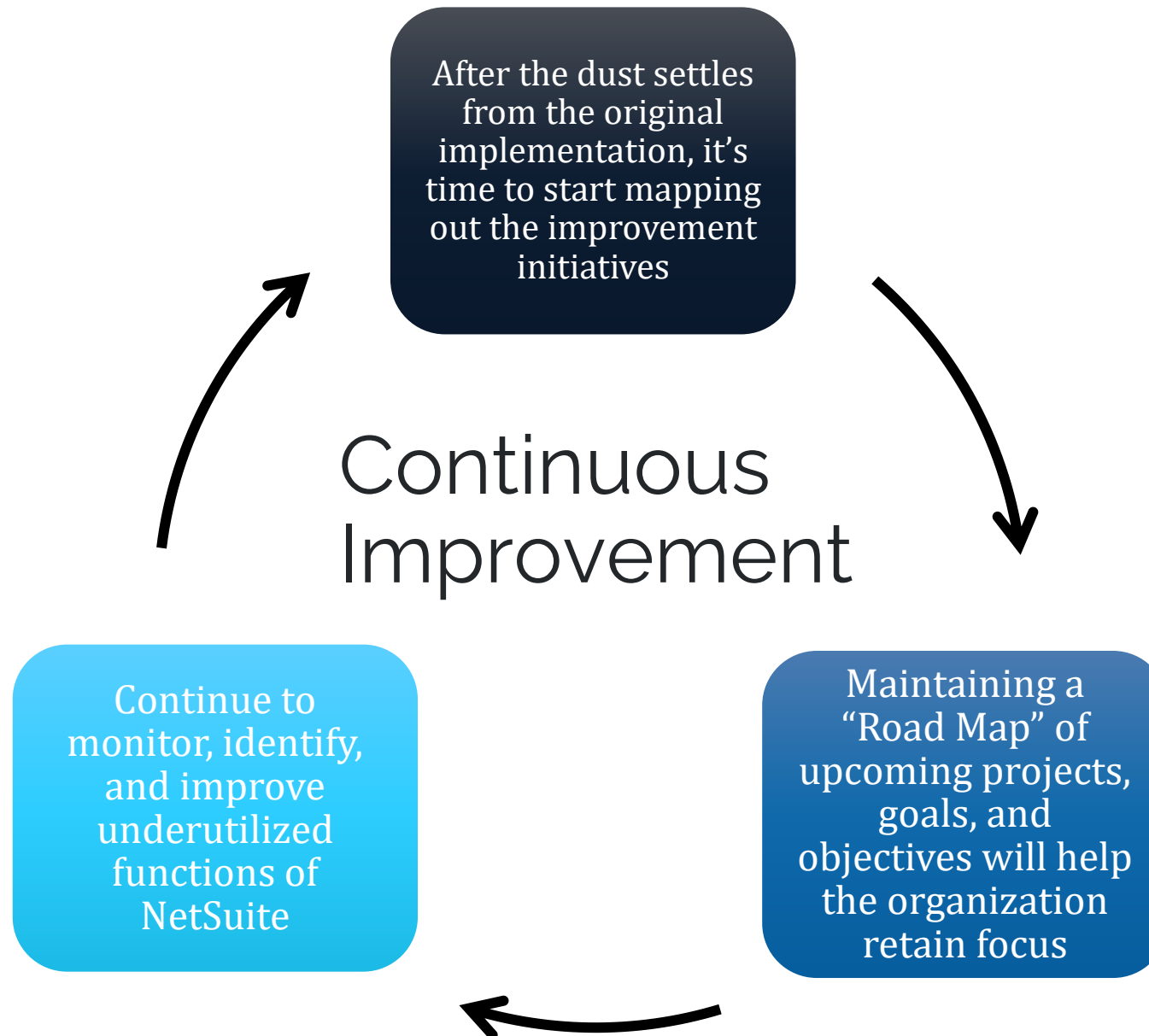
User Efficiency

Save time and resources by leveraging streamlined processes and automations

Promote end user independence in NetSuite by providing the team with tools and methodologies

Reduce manual tasks and activities with simple configurations and modifications

Maximize the value and impact of your Admin Role. Admin doesn't have to be a part time role



Understanding the Role of a NetSuite Administrator

- Role in implementations
- Ongoing Support & Maintenance
- Optimization & Enhancements

Role In Implementation



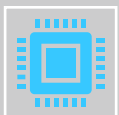
Implementation phase is critical for setting up NetSuite to align with organizational goals.



NetSuite Administrator acts as the bridge between stakeholders and technical teams.



Effective coordination and communication are paramount to ensure a successful implementation.

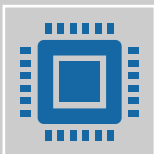


NetSuite Admins should always evaluate the implementation to ensure a scalable and effective solution is being constructed.

Ongoing Support and Maintenance



Ongoing support and maintenance are essential for the smooth functioning of NetSuite.



NetSuite Administrator serves as a point of contact for addressing user concerns and technical issues.



Responsive maintenance helps prevent disruptions and ensures uninterrupted operations.

Optimization and Enhancements



Optimization and enhancement efforts are geared towards maximizing NetSuite's efficiency and effectiveness.



NetSuite Administrator leads initiatives to continuously analyze business processes for improvement opportunities



Continuous optimization ensures NetSuite remains aligned with evolving business requirements and industry trends.

Key Functions & Best Practices

- Data Integrity
- Roles & Access
- Reports/Searches
- Dashboards
- Sandbox Management
- System Health and Performance

Data Integrity



Data integrity is foundational for accurate decision-making and compliance within NetSuite.



The NetSuite Administrator plays a pivotal role in ensuring data integrity through establishing data governance policies and standards.



Upholding data integrity safeguards the reliability and credibility of information within NetSuite.



Roles and Access

Managing roles and access permissions is crucial for maintaining security and data confidentiality in NetSuite.

NetSuite Administrator oversees roles and access by roles and role-based permissions to restrict user access based on job responsibilities.

Roles and Access

ID
customrole_..._controller

CENTER TYPE
Accounting Center

EMPLOYEE RESTRICTIONS
 ALLOW VIEWING

- RESTRICT TIME AND EXPENSES
- SALES ROLE
- SUPPORT ROLE
- INACTIVE
- CORE ADMINISTRATION PERMISSIONS

Subsidiary Restrictions

- ACCESSIBLE SUBSIDIARIES
- ALL
 - ACTIVE
 - USER SUBSIDIARY
 - SELECTED
 - ALLOW CROSS-SUBSIDIARY RECORD VIEWING

Authentication

- SINGLE SIGN-ON ONLY
- WEB SERVICES ONLY ROLE
- RESTRICT THIS ROLE BY DEVICE ID
- TWO-FACTOR AUTHENTICATION REQUIRED
- DURATION OF TRUSTED DEVICE



Reports/Searches

Reports and searches empower users to extract actionable insights from NetSuite data.

NetSuite Administrator facilitates reporting and searching functionalities.

Robust reporting and searching capabilities enable users to derive meaningful insights from NetSuite data.

Reports and Searches

Activities Payments Transactions Lists Reports Analytics Custom

Saved Time Search

Time Entry Review - Approval Status

SEARCH TITLE *
Time Entry Review - Approval Status

ID
customsearch_bpc_timeentryapproval_2

OWNER *
[Dropdown]

PUBLIC
 AVAILABLE AS LIST VIEW

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Exec

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard • Summary

FILTER *
Type

Activities Payments Transactions Lists Reports

Report Builder

- PROJECT BILLING BUDGET VS. ACTUAL

Edit Columns
 Filters
 Sorting
 More Options

NAME *
- Project Billing Budget vs. Actual

SEARCH FIELDS
[Search Box]

ADD FIELDS

 Customer/Project
 Project Profitability

Report Preview

Customer: Project / Category

Name 1
Customer: Project / Category 2
Customer: Project / Category 3
Customer: Project / Category 4
Customer: Project / Category 5
Total

Financial Report Builder

P&L

Edit Layout
 Edit Columns
 Filters

NAME *
P&L

LAYOUT

Add Row/Section...

- Clinic Level EBITDA
- CL EBITDA %
- <Blank Row>
- G&A Cost
 - G&A Cost - Payroll
 - G&A Cost - Non-Payroll
 - G&A Cost - Allocations
- Total G&A Cost
- <Blank Row>
- Other Income
- <Blank Row>
- Reported EBITDA**
- <Blank Row>
- Other Expenses
 - Loss on Asset Early Retirement
 - Depreciation & Amortization
 - Goodwill Impairment
 - Incentives: Equity Expenses

Dashboards



Dashboards offer a visual representation of key performance indicators (KPIs) and metrics within NetSuite.



NetSuite Administrator can optimize dashboards by role to provide relevant reporting, reminders, links, and metrics.



Dynamic dashboards enhance user engagement and facilitate informed decision-making in NetSuite.

Dashboards

Home

Viewing: Portlet date settings Personalize

Reminders

- 29 Sales Orders to Approve
- 28 Bills to Pay
- 113 Invoices Overdue
- 2 Purchase Requests to Approve
- 3 Allocation Schedules due
- 1 Invoices > 30 Days > 100K
- 31 Sales Orders to Invoice
- 8 Journal Entries to Approve

Navigation Portlet

Category : General Accounting

Lists

- Chart of Accounts
- Customers
- Employees
- Items
- Vendors
- Currency Exch Rates
- Allocation Schedules
- Subsidiaries

Transactions

- Journal Entries
- Rev Rec JEs
- Create Budgets
- Intercompany JEs
- Open Currency Bal
- Close Periods
- Import JEs

Reports

- Balance Sheet
- Income Statement
- Trial Balance
- Cash Flow Statement
- A/R Aging
- A/P Aging

Subsidiary Navigator

About Subsidiary Navigator

```

graph TD
    PC[Parent Company] --> Canada
    PC --> UK
    PC --> US
    PC --> XELIMINATIONS
  
```

Key Performance Indicators

SALES

↑ 915.1%

EXPENSES

0.0%

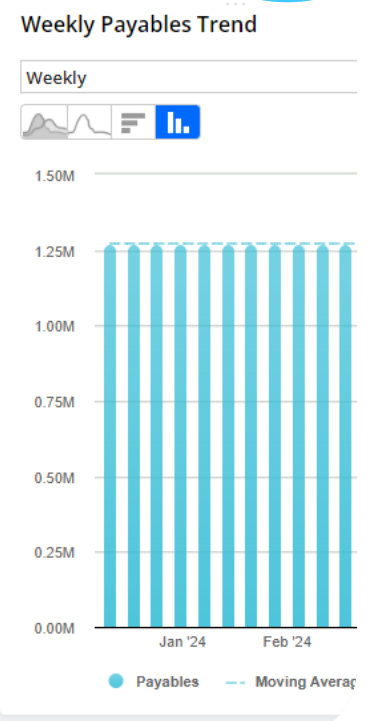
REVENUE

0.0%

RECEIVABLES

↑ 4.3%

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Sales	This Month vs. Last Month	\$125,660	\$12,379	↑ 915.1%
Expenses	This Period vs. Last Period	\$0	\$0	0.0%
Revenue	This Month vs. Last Month	\$152,000	\$15,310	↓ 812.1%



Sandbox Management

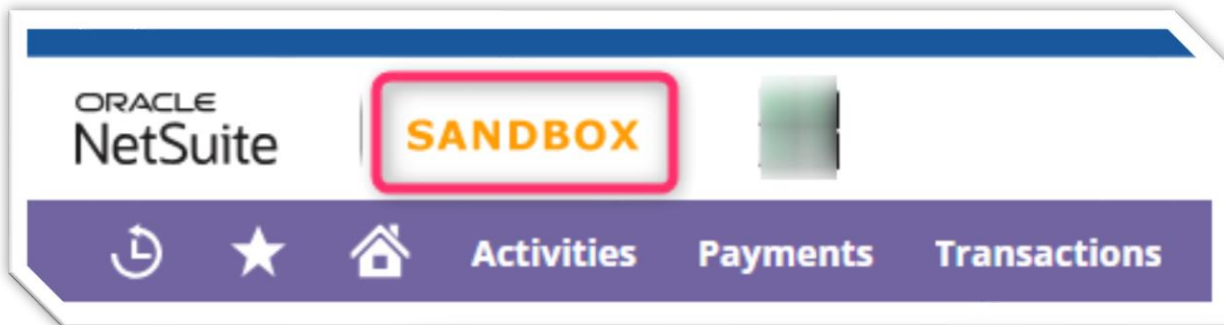


Environment for testing configurations and developments before deploying them to production.

NetSuite Administrator oversees sandbox management by maintaining sandbox environments for additional development, testing, and training purposes.

Minimizes risks associated with system changes and promotes innovation.

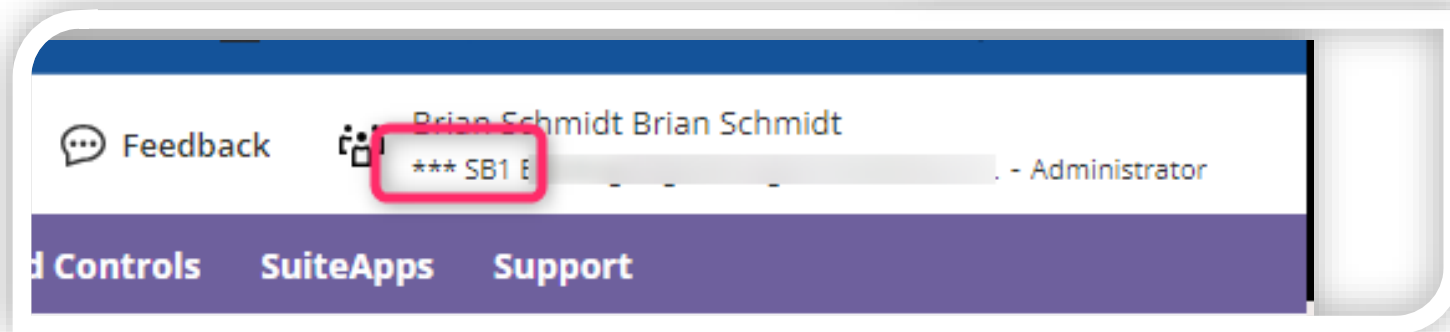
Sandbox Management



Sandbox Accounts

✓ Sandbox Account:*

General	Refresh Summary
ACCOUNT NAME	REFRESHES USED / REFRESHES TOTAL 0/36
ACCOUNT NAME SUFFIX <input type="text"/>	ESTIMATED REFRESH TIME (IN HOURS)
EXPIRATION DATE 1/23/2027 12:00:00 AM	DATE REFRESH REQUESTED 1/26/2024 8:43:43 AM
LAST REFRESH COPIED FROM	DATE REFRESH ACTIVATED
LAST REFRESH COMPLETED 01/26/2024 11:21:20 AM	REFRESH STATUS ✓ Complete



System Health and Performance

Maintaining system health and performance is essential for ensuring optimal NetSuite user experience.

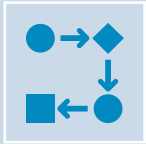
NetSuite Administrator monitors system health and performance by conducting regular performance tuning and optimization activities.

Proactive management of system health and performance enhances reliability and user satisfaction in NetSuite.

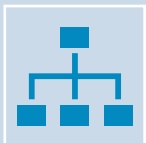
Issue Management

- Issue Management Process
- Ticket Capture Process
- Ticketing Systems

Issue Management Overview



Organizations should have a dedicated process for how issues are managed, logged, and tracked. Direct contact with the NetSuite Administrator should rarely be the first point of contact for a new issue.

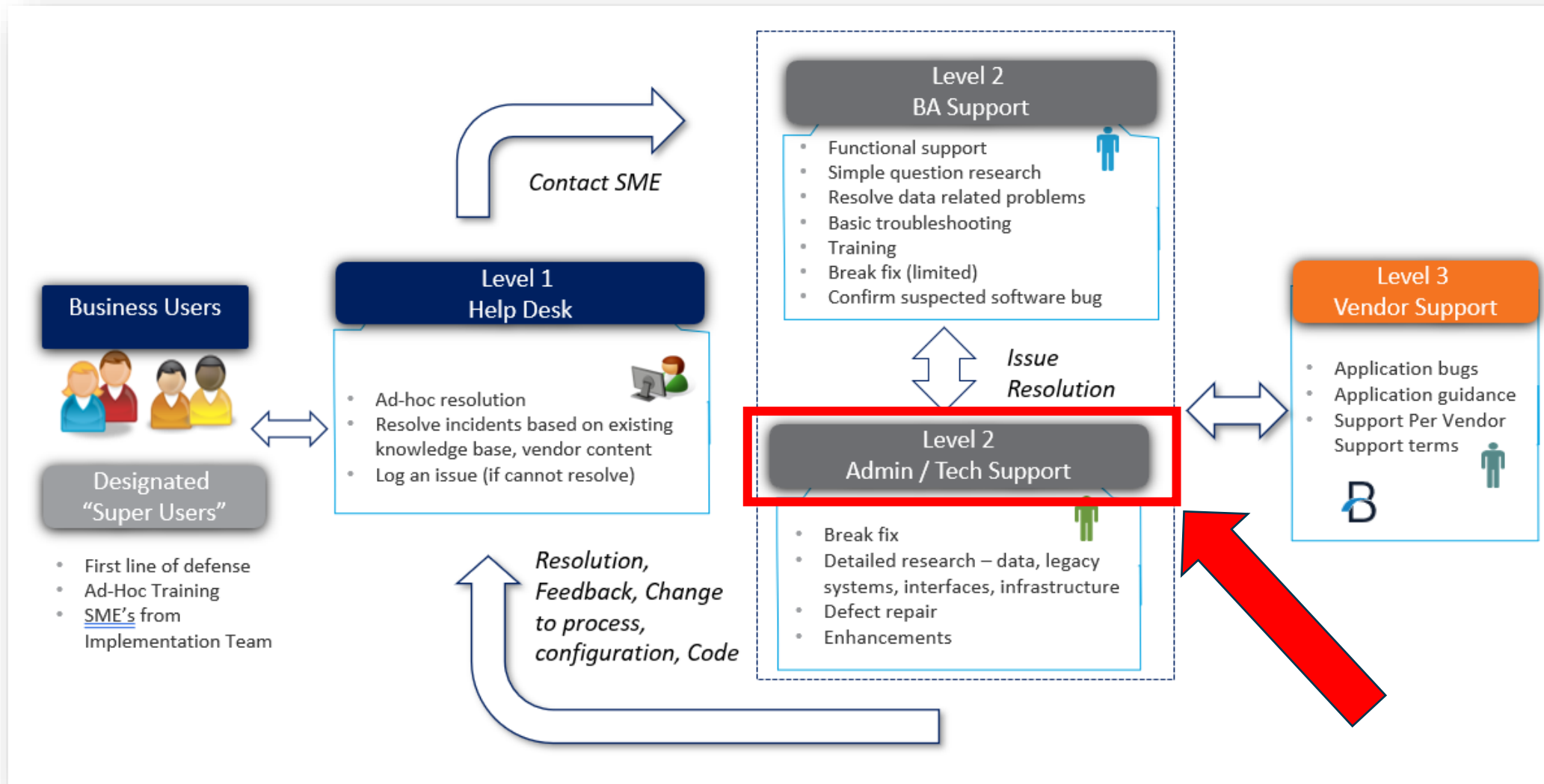


An Issue Management Process may include multiple 'Levels' to encourage issue resolution at various stages, depending on the severity and complexity of issues

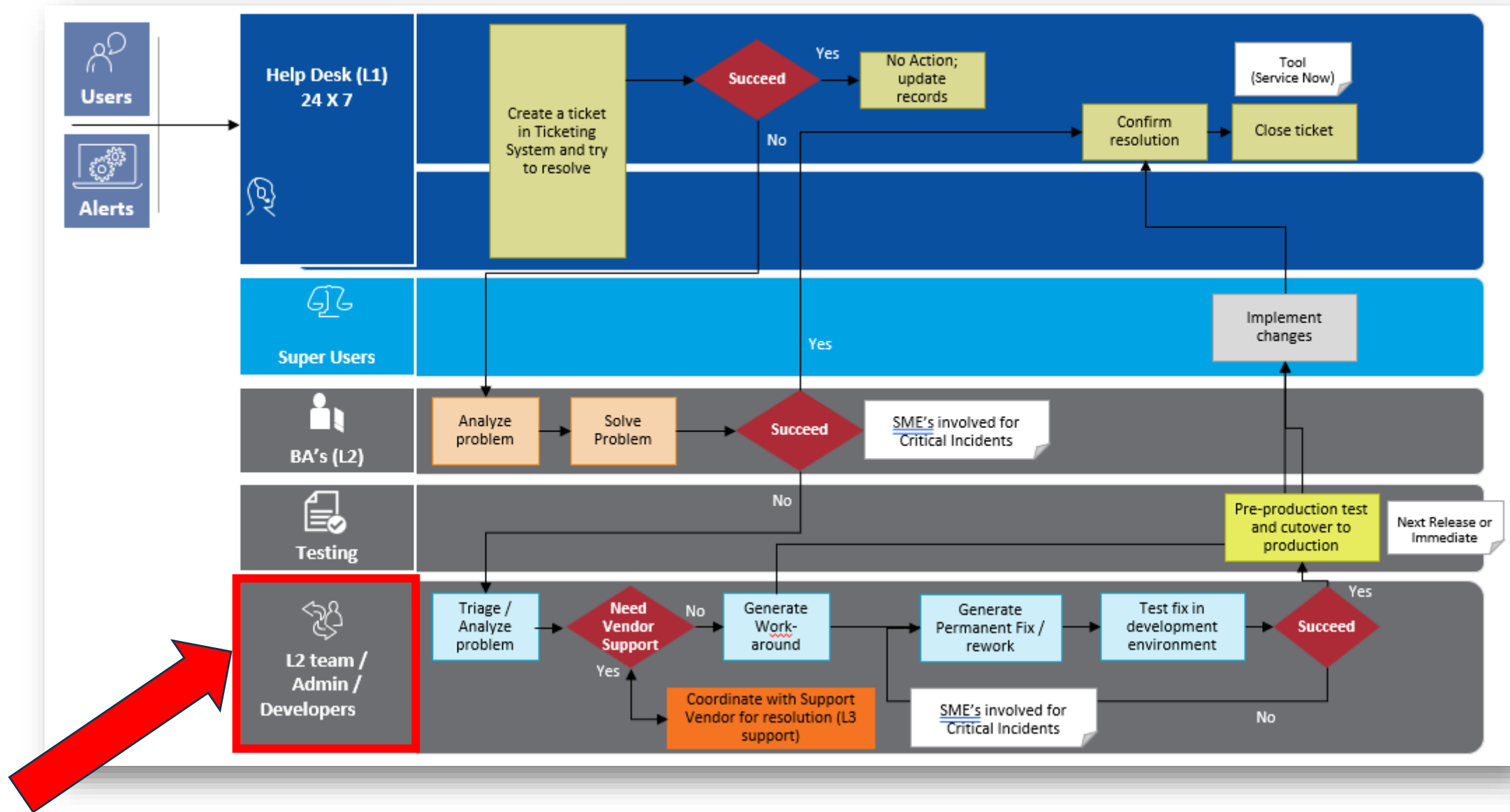


Having an organized structure helps streamline the issue management process and allows for Administrators to focus on top priority issues

Issue Management Overview



Issue Management Detail



Capturing Issues & Tickets



Many companies elect to use a ticket management software for the tracking of outstanding issues

Excel or Google Sheets is not recommended for ticket capture



This allows for tickets and issues to be tracked in a transparent manner across the organization



When capturing issues and tickets, each ticket should have attributes that help describe the issues and provide categorization and detail.



Tickets provide backup and justification for production updates.

Typical Ticket Details

- Date of Issue
- Submitted by (employee)
- Status (New, Open, Escalated, Closed, etc.)
- Issue Type (Data, Configuration, Integration, Access Provisioning, etc.)
- Systems Impacted (NetSuite, CRM, Middleware, etc.)
- Business Process (Order-to-Cash, Procure-to-Pay, Record-to-Report, etc.)
- Priority (Low, Medium, High, Urgent)
- Issue description
- Screenshots or images
- Link to NetSuite Record
- Date closed

Sample Ticket Management Solutions



Zoho
Desk

 **smartsheet**

servicenow



zendesk



Jira Software

ORACLE
NETSUITE



freshdesk



happyfox

BREAK

Monitoring your NetSuite Instance

- [Using Dashboards to Monitor NetSuite](#)
- [Leverage Saved Searches to Identify Issues](#)
- [Additional NetSuite Functions to Help Audit NetSuite](#)
- [Knowing when it's time to call for backup](#)

Using Dashboards to Monitor NetSuite

Similar to how end users use Dashboards to help track tasks and action items, Dashboards can be leveraged by Administrators as well to identify issues ahead of time.

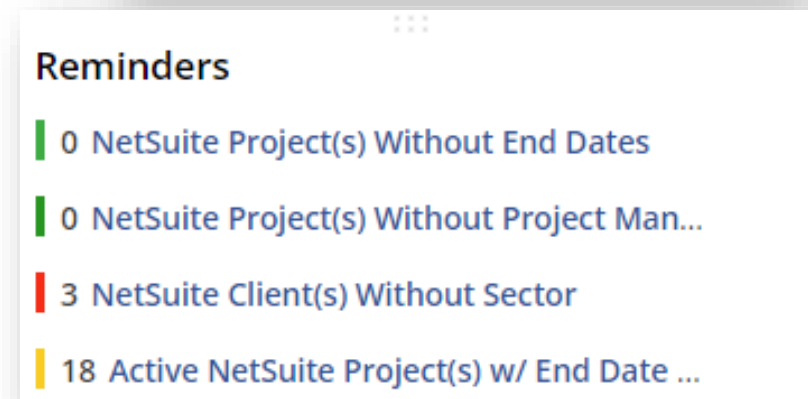
Administrator Dashboard Tips

1. **Set up Reminders** that end users leverage to help speak a common language in NetSuite
2. **Build Searches/Reminders** to identify things that can (and will) go wrong with NetSuite records
 - a. Example: Records missing field values, script errors, workflow anomalies
3. **Be Proactive** – Leverage prior tickets and issues as the framework for dashboard items. Doing this can help identify issues before they progress further



Reminders

- 0 Bill Payment(s) Pending Approval
- 1 Cost Center(s) Pending Approval
- 0 Fixed Assets Pending Approval
- 18 Journal Entry(s) Pending Approval (All)
- 0 Equity Journal Entry(s) Pending Approval
- 18 Revenue Journal Entry(s) Pending Approval
- 0 Standard Journal Entry(s) Pending Approval
- 290 Rejected Journal Entry(s) Pending Resubmissi...



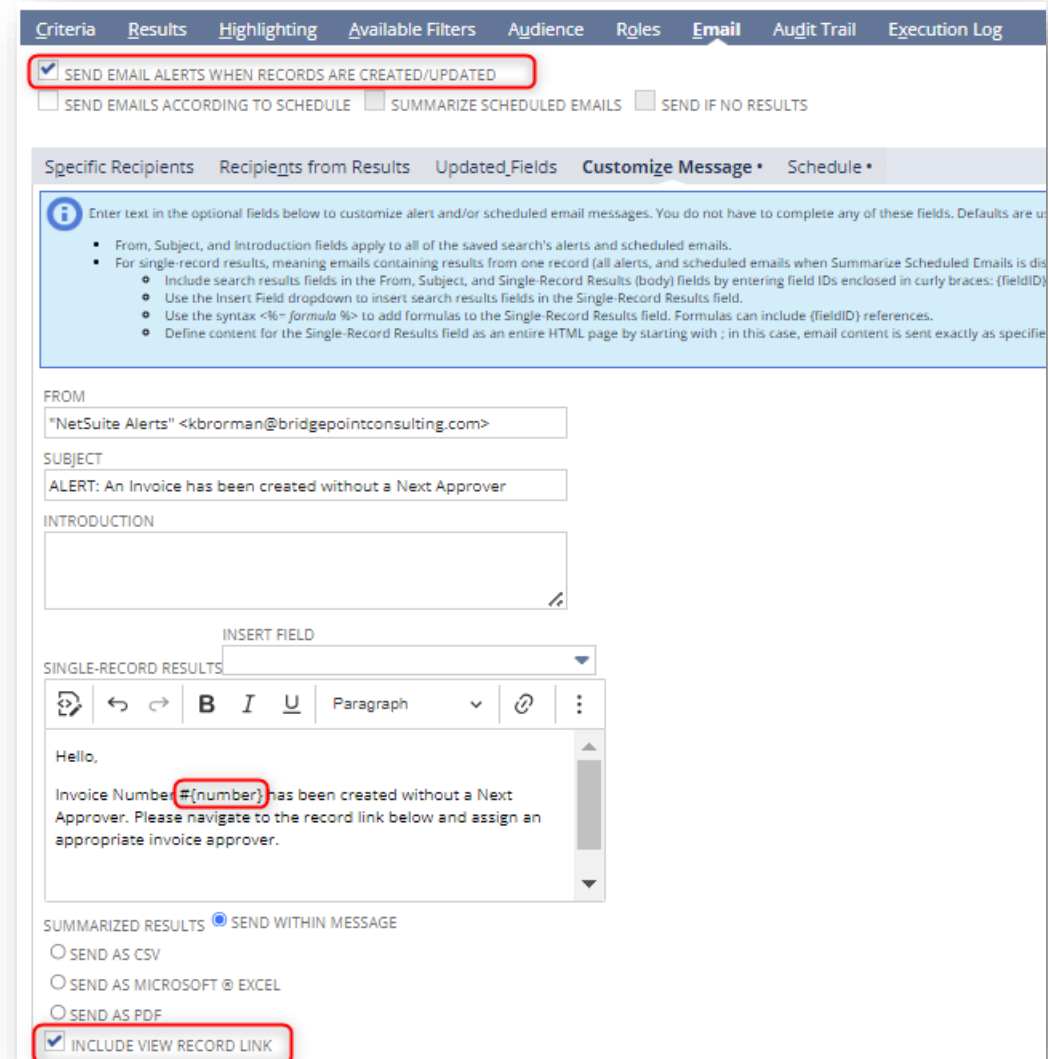
Reminders

- 0 NetSuite Project(s) Without End Dates
- 0 NetSuite Project(s) Without Project Man...
- 3 NetSuite Client(s) Without Sector
- 18 Active NetSuite Project(s) w/ End Date ...

Leverage Saved Searches to Identify Issues

By using the “Email” subtab on saved searches, you can have NetSuite send an email when a record has a specific criteria.

- To do this:
 - Set the criteria on the search as desired
 - Check the “Send Email Alerts when Records are Created/Updated” on the email tab
 - Type a title and a message body
 - Fields from the record can be leverage in the body of the message to provide detail about the record in the email
 - Check the “Include View Record Link” box to have a hyperlink embedded in the email with a link directly to the record at hand.



Criteria Results Highlighting Available Filters Audience Roles **Email** Audit Trail Execution Log

SEND EMAIL ALERTS WHEN RECORDS ARE CREATED/UPDATED
 SEND EMAILS ACCORDING TO SCHEDULE SUMMARIZE SCHEDULED EMAILS SEND IF NO RESULTS

Specific Recipients Recipients from Results Updated Fields **Customize Message** Schedule

Enter text in the optional fields below to customize alert and/or scheduled email messages. You do not have to complete any of these fields. Defaults are used for all fields.

- From, Subject, and Introduction fields apply to all of the saved search's alerts and scheduled emails.
- For single-record results, meaning emails containing results from one record (all alerts, and scheduled emails when Summarize Scheduled Emails is disabled):
 - Include search results fields in the From, Subject, and Single-Record Results (body) fields by entering field IDs enclosed in curly braces: {fieldID}
 - Use the Insert Field dropdown to insert search results fields in the Single-Record Results field.
 - Use the syntax <%= formula %> to add formulas to the Single-Record Results field. Formulas can include (fieldID) references.
 - Define content for the Single-Record Results field as an entire HTML page by starting with ; in this case, email content is sent exactly as specified.

FROM
"NetSuite Alerts" <kbrorman@bridgepointconsulting.com>

SUBJECT
ALERT: An Invoice has been created without a Next Approver

INTRODUCTION

INSERT FIELD

SINGLE-RECORD RESULTS

Hello,
Invoice Number **#{number}** has been created without a Next Approver. Please navigate to the record link below and assign an appropriate invoice approver.

SUMMARIZED RESULTS SEND WITHIN MESSAGE
 SEND AS CSV
 SEND AS MICROSOFT @ EXCEL
 SEND AS PDF
 INCLUDE VIEW RECORD LINK

Additional NetSuite Functions to Help Audit NetSuite

- **Transaction Numbering Audit Log** – provides a complete list of every internal transaction number including the numbers that were assigned to standard and custom transactions that have been deleted or failed to be created. (SuiteAnswers 27091)
 - *TIP: Saves Searches are available on the Audit Trail*

Transaction Numbering Audit Log

VIEW: Transaction Numbering Audit Log Customize View

FILTERS: TRANSACTION TYPE: - All - SUBSIDIARY: - All - DELETION REASON CODE: - All - STYLE: Normal

TRANSACTION TYPE	TRANSACTION NUMBER	DATE ALLOCATED	AUTHOR	DATE DELETED	DELETED BY	DELETION REASON	DELETION REASON MEMO
Journal	JOURNAL18081	3/6/2024 11:29 am	[User]	3/13/2024 5:31 pm	[User]	Original Document Damaged	
Journal	JOURNAL18082	3/6/2024 11:29 am	[User]	3/13/2024 5:31 pm	[User]		
Journal	JOURNAL18271	3/7/2024 9:53 pm	[User]	3/7/2024 9:53 pm	[User]	Other	Reversal date removed
Journal	JOURNAL17398	2/9/2024 10:21 am	[User]	2/15/2024 4:49 pm	[User]	Other	This transaction was deleted by script or web service.
Journal	JOURNAL17396	2/9/2024 10:21 am	[User]	2/15/2024 4:49 pm	[User]	Other	This transaction was deleted by script or web service.

- **Transaction Audit Trail** – produce a report that provides a detailed history of all transactions entered into NetSuite. The audit trail provides information about the transaction, who entered the transaction, and when the transaction was created or modified. (SuiteAnswers 9073)


Audit Trail

2024-03-14 — 2024-01-02 11:59 ← → TOTAL: 7845

DATE/TIME	USERNAME	ACTION	TYPE	INTERNAL ID	DOCUMENT NUMBER	TRANSACTION NUMBER	POST DATE	ACCOUNT	AMOUNT
3/14/2024 4:53 pm	[User]	CHANGE	Invoice	827779	INV6028	CUSTINVC6028	3/14/2024	Accounts Receivable - Trade	86,014.99
3/13/2024 5:31 pm	[User]	CHANGE	Journal	790135	JE18019	JOURNAL18081	2/29/2024		
3/13/2024 5:31 pm	[User]	DELETE	Journal	790135	JE18019	JOURNAL18081	2/29/2024		
3/13/2024 5:31 pm	[User]	DELETE	Journal	790136	JE18020	JOURNAL18082	3/1/2024		
3/13/2024 9:25 am	[User]	CHANGE	Invoice	551273	INV4231	CUSTINVC4231	6/1/2023	Accounts Receivable - Trade	27,000.00
3/13/2024 9:16 am	[User]	CHANGE	Credit Card	711604	111230513	CARDCHRG61	1/28/2024	[Account]	-8,000.00
3/13/2024 9:16 am	[User]	CHANGE	Credit Card	711625	111377709	CARDCHRG82	1/29/2024	[Account]	-8,000.00

Additional NetSuite Functions to Help Audit NetSuite (Cont.)

- **Audit Trail for Features and Preferences** – Many of the features and preferences screens in NetSuite have a ‘hidden’ Audit Trail.
- By navigating to this Audit Trail, Admins can see a log of all the changes to features and preferences within the account.



Accounting Preferences

Save Cancel

More

Audit Trail

Add To Shortcuts

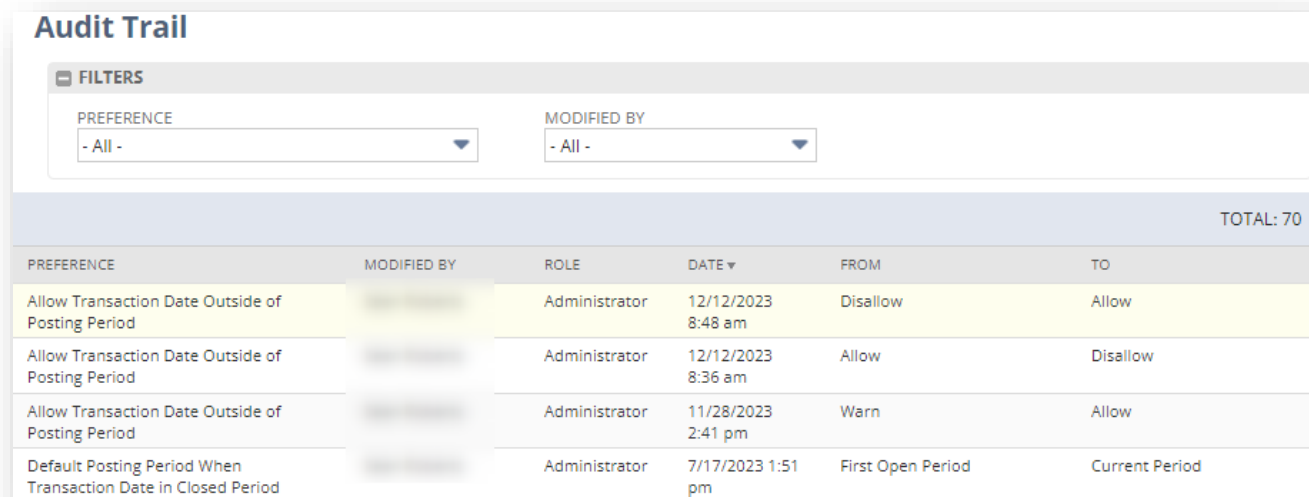
General Items/Transactions Order Management Time & Expenses Approval Routing

General Ledger

USE ACCOUNT NUMBERS

USE LEGAL NAME IN ACCOUNT

SHOW ALL TRANSACTION TYPES IN RECONCILIATION



Audit Trail

FILTERS

PREFERENCE: - All -

MODIFIED BY: - All -

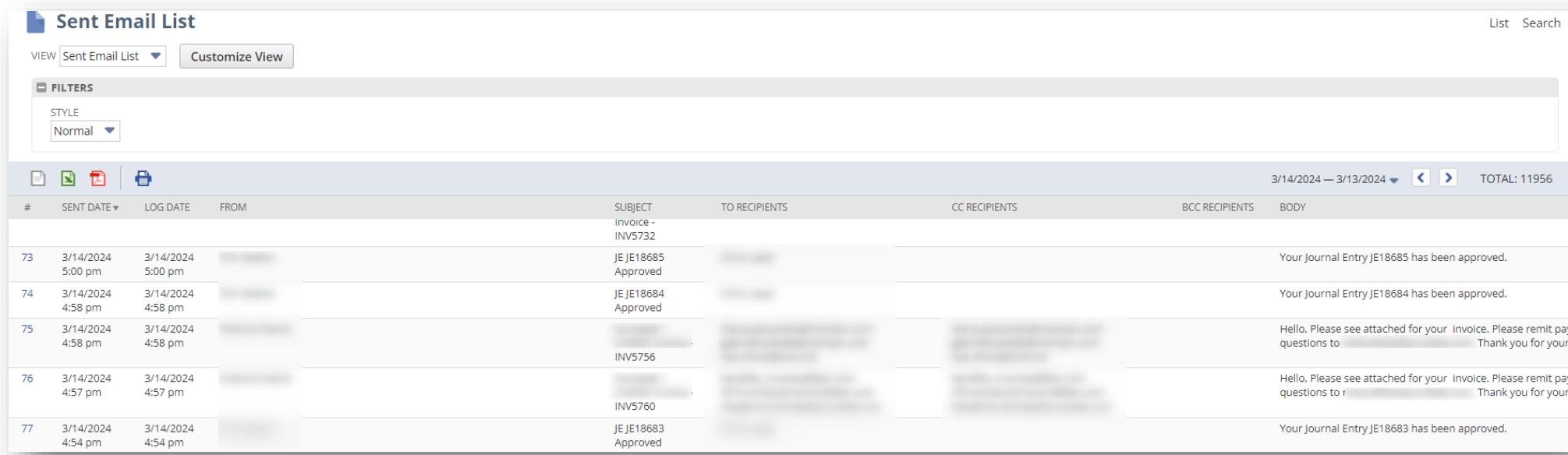
TOTAL: 70

PREFERENCE	MODIFIED BY	ROLE	DATE	FROM	TO
Allow Transaction Date Outside of Posting Period		Administrator	12/12/2023 8:48 am	Disallow	Allow
Allow Transaction Date Outside of Posting Period		Administrator	12/12/2023 8:36 am	Allow	Disallow
Allow Transaction Date Outside of Posting Period		Administrator	11/28/2023 2:41 pm	Warn	Allow
Default Posting Period When Transaction Date in Closed Period		Administrator	7/17/2023 1:51 pm	First Open Period	Current Period

Additional NetSuite Functions to Help Audit NetSuite (Cont.)

- Sent Email List** - (*Setup > Company > Sent Email List*) provides a view into all outgoing email sent from an account. You can view email that was delivered successfully as well as email that was not delivered to the recipient. (SuiteAnswers 87459)

TIP: Sent Email list captures all emails, including approval related emails to employees, as well as external party related emails (i.e. Invoice or Purchase Order emails)
- Undelivered Emails** – (*Lists > mailing > Undelivered Emails*)



The screenshot shows the NetSuite 'Sent Email List' interface. At the top, there is a 'VIEW' dropdown set to 'Sent Email List' and a 'Customize View' button. Below this is a 'FILTERS' section with a 'STYLE' dropdown set to 'Normal'. The main area displays a table of email records with columns for #, SENT DATE, LOG DATE, FROM, SUBJECT, TO RECIPIENTS, CC RECIPIENTS, BCC RECIPIENTS, and BODY. The table shows several entries, including journal entry approvals and invoice-related emails.

#	SENT DATE	LOG DATE	FROM	SUBJECT	TO RECIPIENTS	CC RECIPIENTS	BCC RECIPIENTS	BODY
73	3/14/2024 5:00 pm	3/14/2024 5:00 pm		JE JE18685 Approved				Your Journal Entry JE18685 has been approved.
74	3/14/2024 4:58 pm	3/14/2024 4:58 pm		JE JE18684 Approved				Your Journal Entry JE18684 has been approved.
75	3/14/2024 4:58 pm	3/14/2024 4:58 pm		INV5756				Hello, Please see attached for your invoice. Please remit pay questions to Thank you for your
76	3/14/2024 4:57 pm	3/14/2024 4:57 pm		INV5760				Hello, Please see attached for your invoice. Please remit pay questions to Thank you for your
77	3/14/2024 4:54 pm	3/14/2024 4:54 pm		JE JE18683 Approved				Your Journal Entry JE18683 has been approved.

Additional NetSuite Functions to Help Audit NetSuite (Cont.)

- **View Billing Information** - shows installed components, add-on modules, provisioning history, and component usage.
- Useful Items on Billing Information page:
 - **Full Licensed Users & HR Employees** – the current and available user licenses within the account
 - **File Cabinet Size** – the amount of storage available in the file cabinet
 - **Monthly Transaction Lines** – the allotted number of transaction lines within your current ‘tier’ of NetSuite
 - **Subsidiary Count & Country Limit** – count of all the used and available subsidiaries and countries
 - **Sandbox Refresh Count** – the number of sandbox refreshes available

Billing Information More

PRODUCT
NetSuite

ANNIVERSARY DATE
5/30/2023

SERVICE TIER
Premium - [View all tiers](#)

Billable Components	Add-On Modules	Add On Bundles	Provisioning History	Component Usage
** This component is a key attribute of your Service Tier.				
COMPONENT A			CURRENT PROVISIONED QTY	CURRENT USED QTY
Adv Order Mgmt Automated Orders			5,000	0
Advanced Partner Center			0	0
Bill Payment			50	0
Bulk Merge Email Volume			360,000	0
Campaign Email Volume			120,000	0
Direct Deposit			15	0
EFT			20	0
Employee Center			25	0
File Cabinet Size (GB) **			1,100	5,8319
Full Licensed Users **			48	38
HR Employee			0	78
Integration Units			100,000	1
Monthly Transaction Lines **			2,000,000	33,457

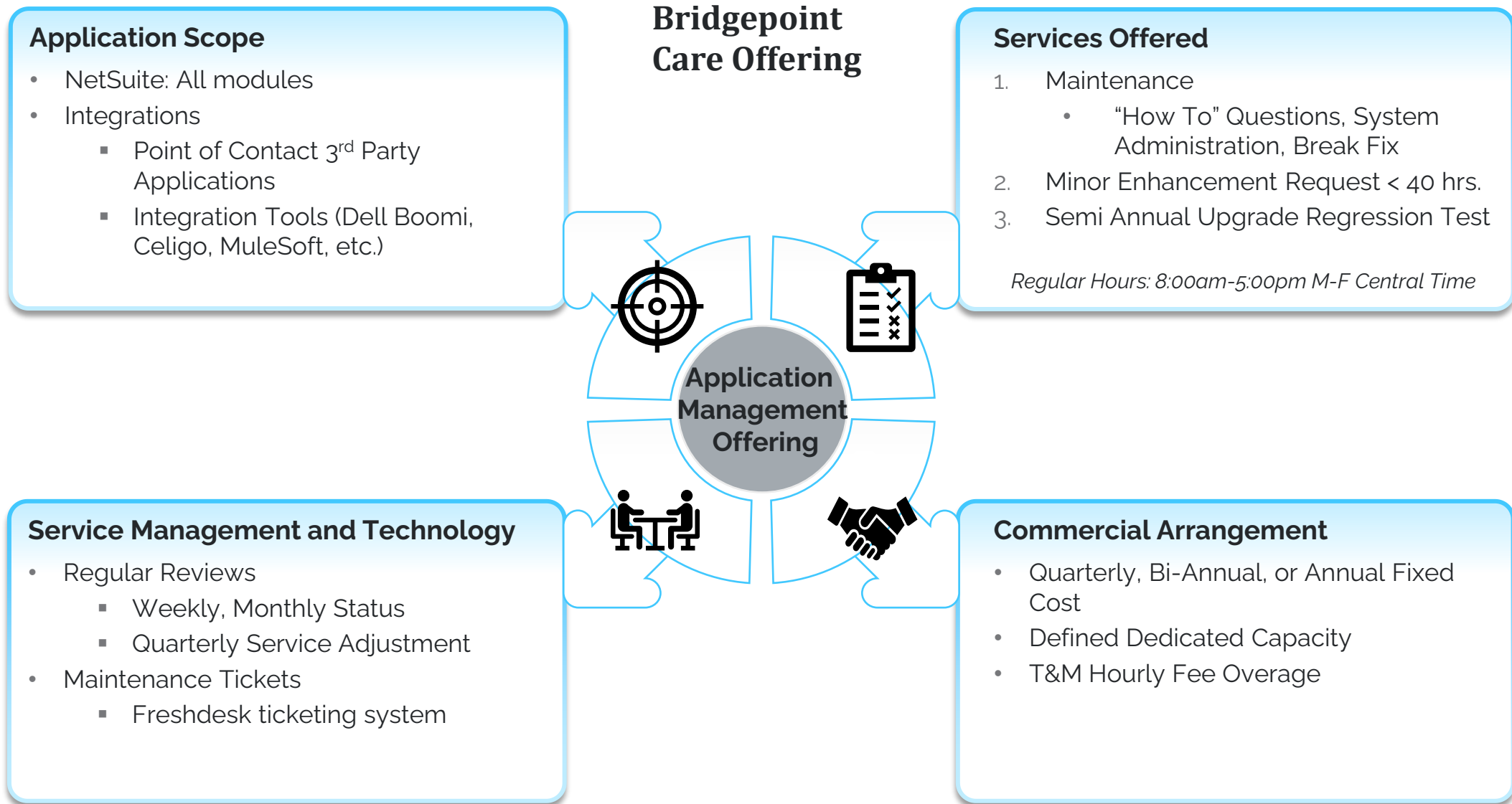
Knowing when it's time for more help

It's important for an organization to know the tipping point for hiring an additional admin, or to go outside of the company and hire a firm to help support NetSuite.

Below are few key signs that may indicate it's the right time to move forward with additional support

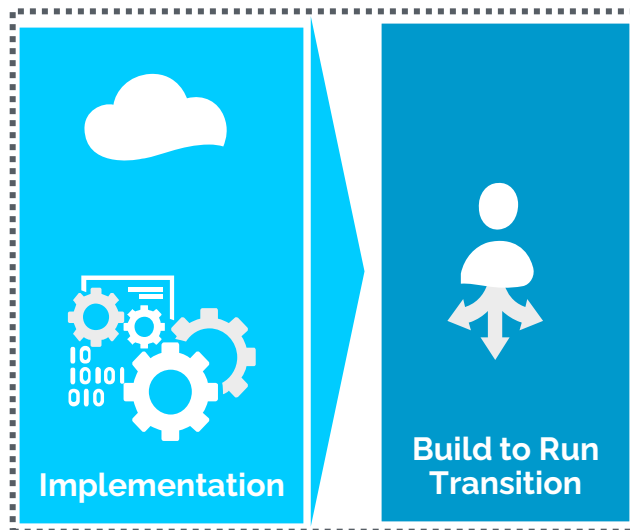
Complexity of Business Process	Limited Bandwidth	Specialized/Technical Expertise	Upcoming Large Initiatives	Strategic Guidance
<ul style="list-style-type: none"> • Company's business process are growing more complex, and in need of large transformational changes • Administrator has limited knowledge of a particular business process that is needing to be implemented 	<ul style="list-style-type: none"> • Ticket resolutions are extending in duration • Issue volume is increasing beyond the capacity of the Administrator team • Users need more advanced training and enablement beyond the Administrators availability 	<ul style="list-style-type: none"> • NetSuite account has a large amount of SuiteScripts, Workflows or Customizations • Large number of issues that require NetSuite development and scripting to resolve • New integrations are needed to achieve business automation 	<ul style="list-style-type: none"> • Large initiatives (such as acquisitions) that would require dedicated focus • New service lines that require large overhauls to the NetSuite configuration to accommodate 	<ul style="list-style-type: none"> • Administrators are focused on day-to-day activities and not able to participate in strategic direction of the company • Need industry best practices on how to improve business process across the organization

Service Structure



Bridgepoint Care Model

Robust, efficient and cost-effective NetSuite and 3rd party Applications Support model



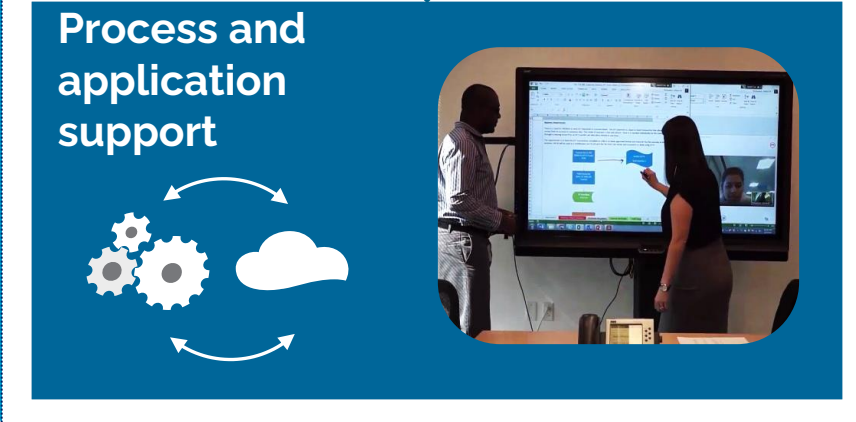
Business Users 



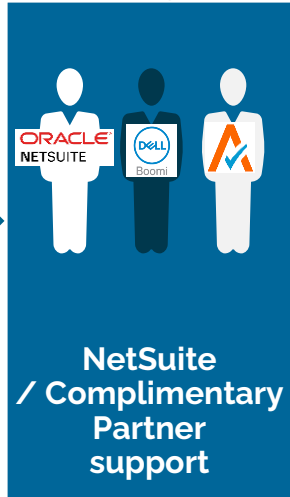
Level 1



Level 2



Level 3



Engagement Management

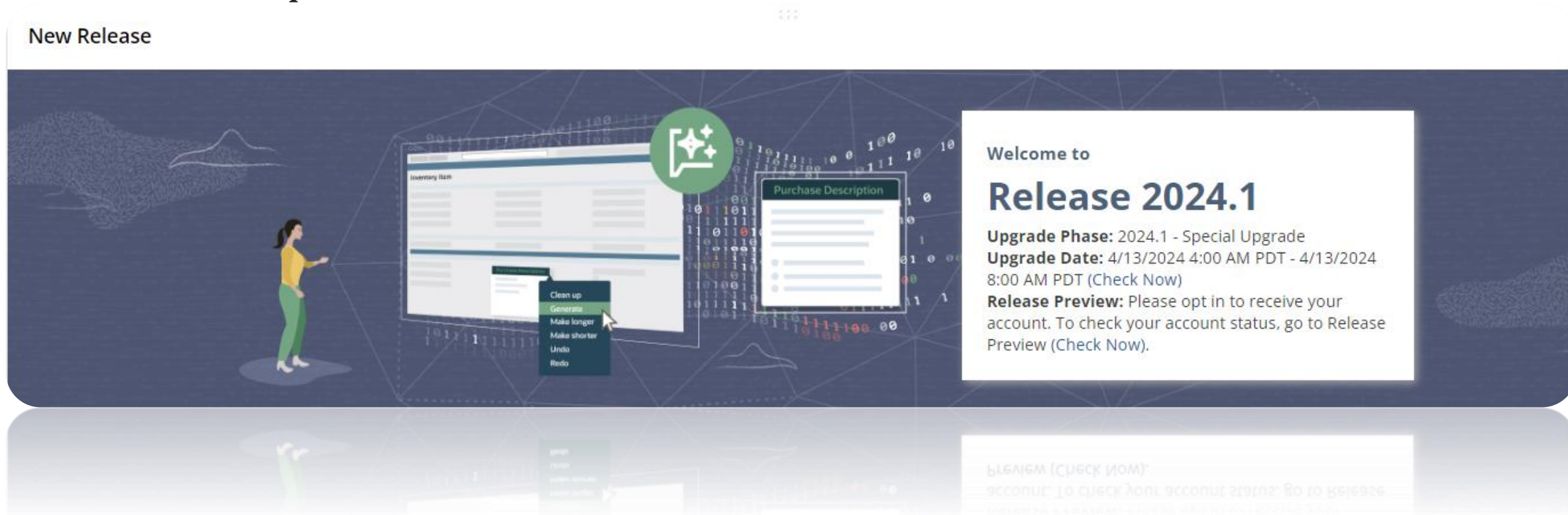
-  Project Team
-  BPCare & Project Team
-  Client
-  BPCare Team

Continuous Learning and Professional Development

- [NetSuite Releases](#)
- [Trainings](#)
- [Skill Advancement](#)

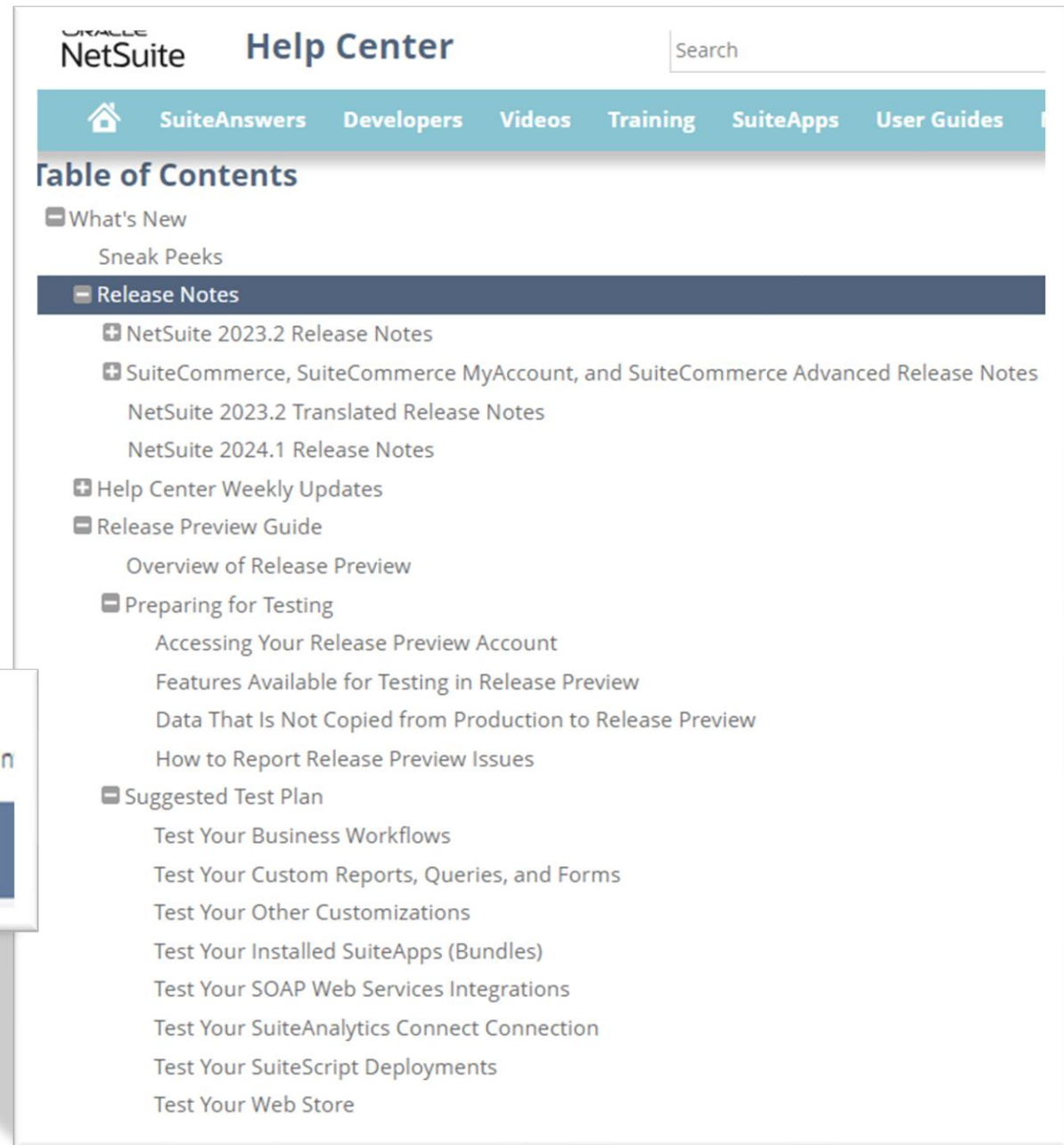
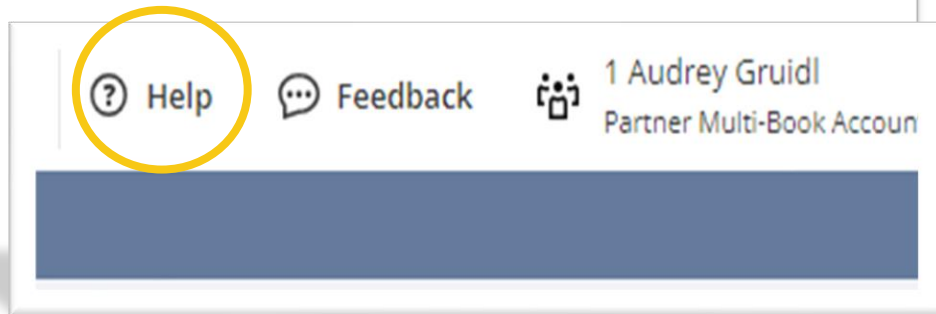
NetSuite Release

- On your NetSuite Homepage
 - Rescheduling
 - Request Release Preview Environment



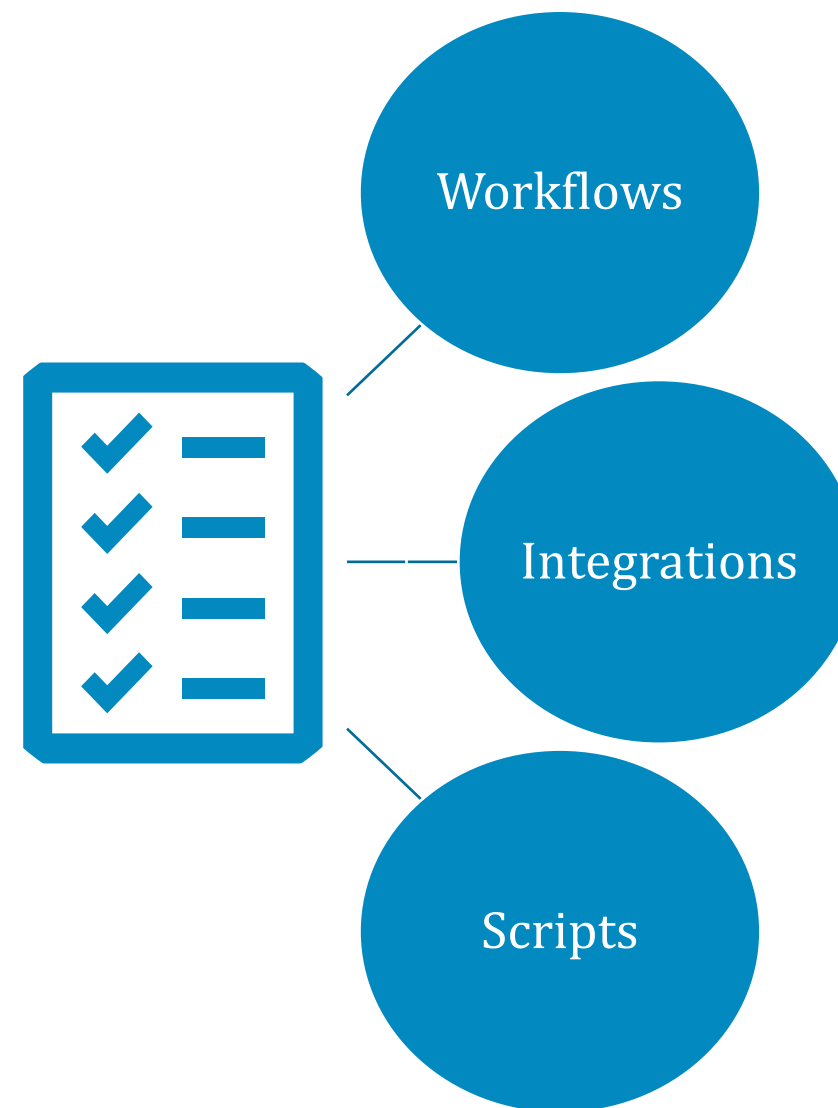
Release Notes

1. Navigate to the Help Center
2. Within NetSuite, click “Help” in the upper right corner



Release Testing

1. Review Release Notes
2. Refresh Sandbox
3. Test critical workflows
4. Regression Testing
5. UAT – involve Super Users
6. Make any necessary changes
7. Document updates
8. Communication plan
9. Training
10. Plan if new release could cause significant issues



SuiteIdeas



Privacy Compliance Multi Language Support ACS SuiteIdeas

Welcome to SuiteIdeas

SuiteIdeas

Introducing **SuiteIdeas**

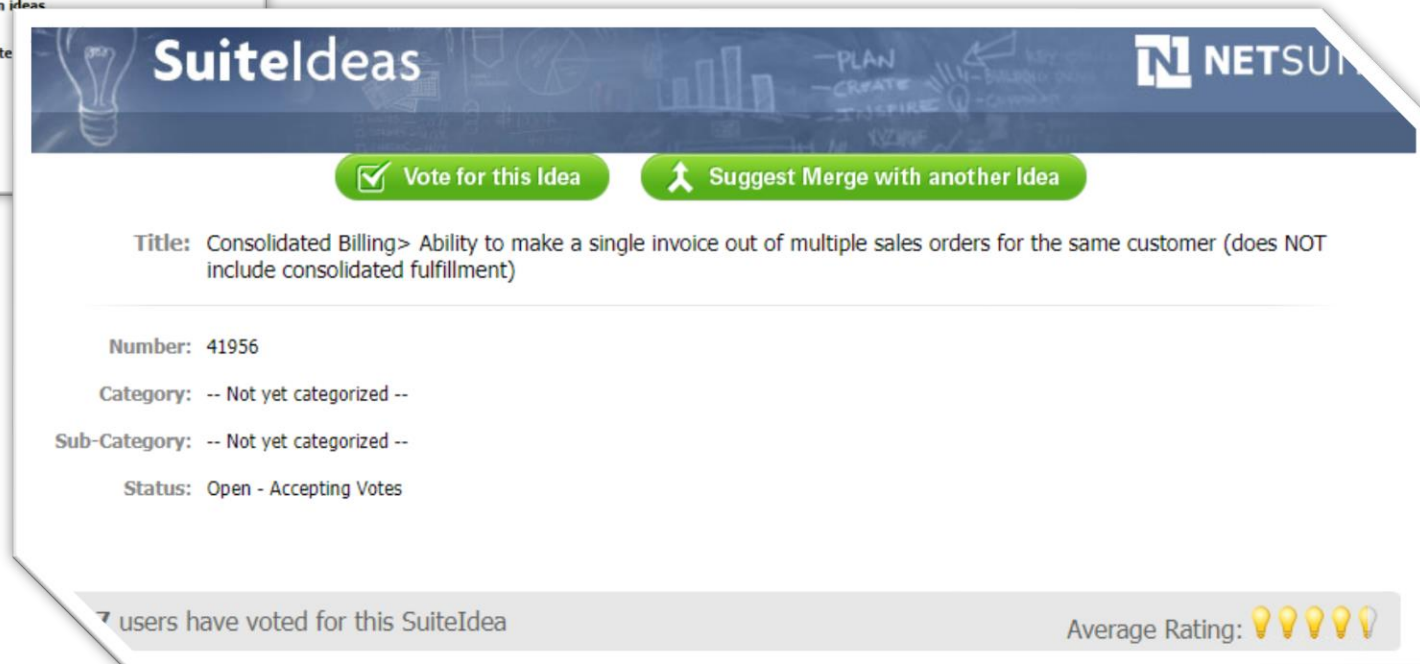
SuiteIdeas is an online collaboration community where NetSuite users can:

- Search existing Enhancement Request ideas
- View, vote, and collaborate on ideas
- Suggest a new idea to NetSuite
- Launch the SuiteIdeas site

File a New Idea

Vote for this Idea

Navigation:
Support > Account Center



SuiteIdeas

Vote for this Idea

Suggest Merge with another Idea

Title: Consolidated Billing> Ability to make a single invoice out of multiple sales orders for the same customer (does NOT include consolidated fulfillment)

Number: 41956

Category: -- Not yet categorized --

Sub-Category: -- Not yet categorized --

Status: Open - Accepting Votes

7 users have voted for this SuiteIdea

Average Rating: ⭐⭐⭐⭐



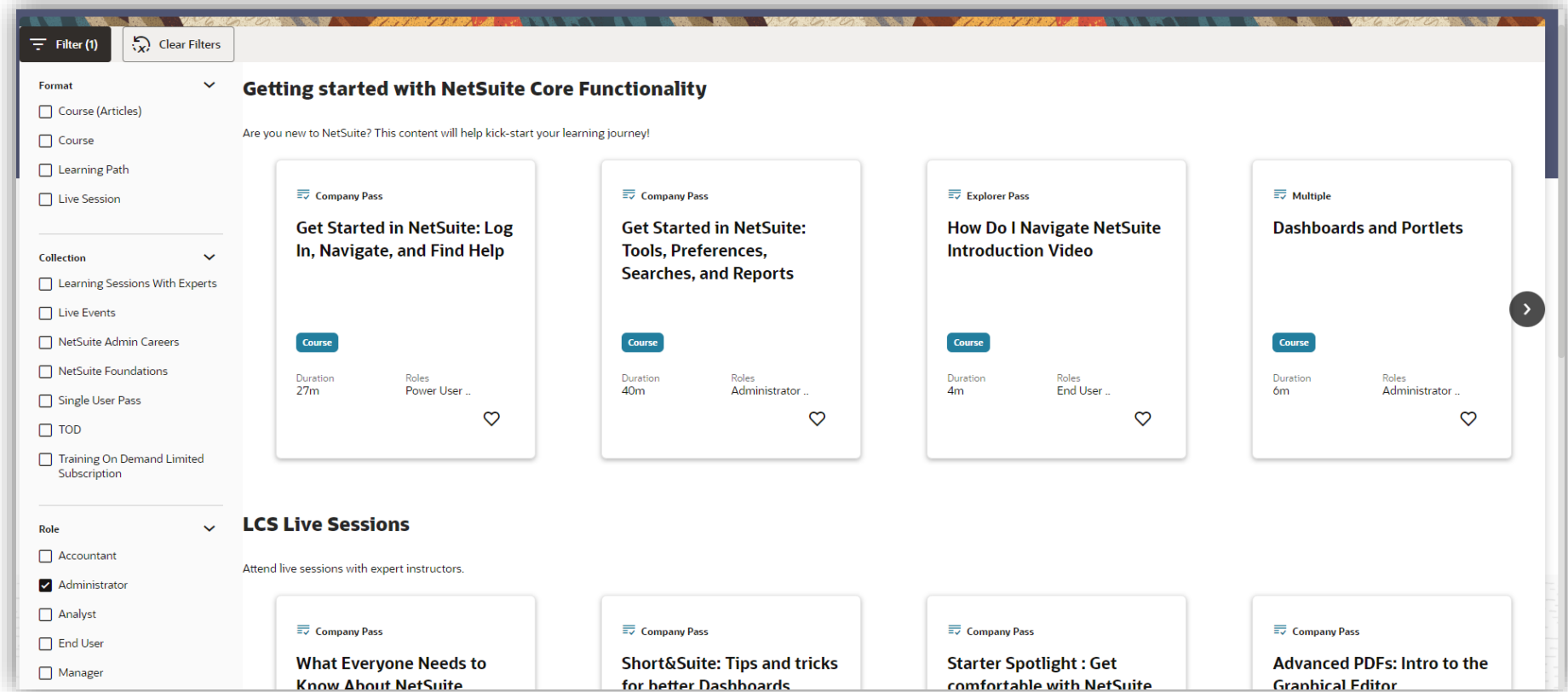
NetSuite Learning Center

Training Videos

- For Admins
- Provide suggestions to users
- Track User Training completion

Certifications

- NetSuite Administrator



The screenshot displays the NetSuite Learning Center interface. On the left, there is a sidebar with filter options:

- Format:**
 - Course (Articles)
 - Course
 - Learning Path
 - Live Session
- Collection:**
 - Learning Sessions With Experts
 - Live Events
 - NetSuite Admin Careers
 - NetSuite Foundations
 - Single User Pass
 - TOD
 - Training On Demand Limited Subscription
- Role:**
 - Accountant
 - Administrator
 - Analyst
 - End User
 - Manager

The main content area is divided into two sections:

- Getting started with NetSuite Core Functionality:**

Are you new to NetSuite? This content will help kick-start your learning journey!

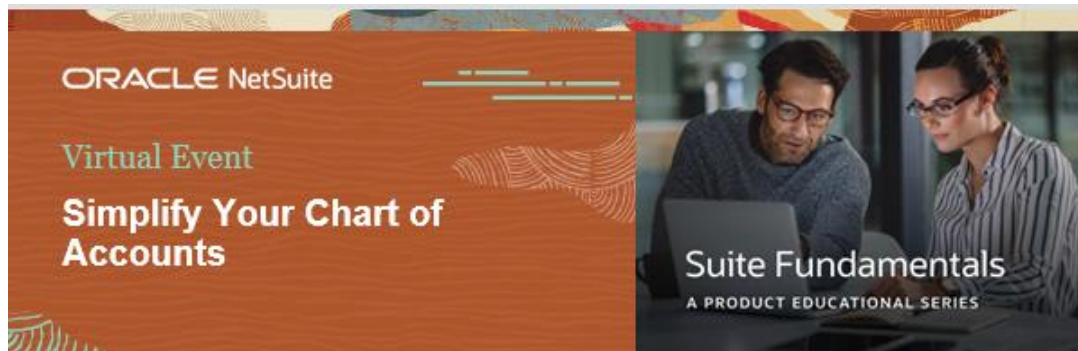
 - Get Started in NetSuite: Log In, Navigate, and Find Help** (Duration: 27m, Role: Power User ...)
 - Get Started in NetSuite: Tools, Preferences, Searches, and Reports** (Duration: 40m, Role: Administrator ...)
 - How Do I Navigate NetSuite Introduction Video** (Duration: 4m, Role: End User ...)
 - Dashboards and Portlets** (Duration: 6m, Role: Administrator ...)
- LCS Live Sessions:**

Attend live sessions with expert instructors.

 - What Everyone Needs to Know About NetSuite** (Role: Company Pass)
 - Short&Suite: Tips and tricks for better Dashboards** (Role: Company Pass)
 - Starter Spotlight : Get comfortable with NetSuite** (Role: Company Pass)
 - Advanced PDFs: Intro to the Graphical Editor** (Role: Company Pass)

NetSuite Live Meetings

NS Live Trainings



ORACLE NetSuite

Virtual Event

Simplify Your Chart of Accounts

Suite Fundamentals
A PRODUCT EDUCATIONAL SERIES

Improve Accounting Accuracy and Reporting Flexibility

Thursday, December 21, 2023, 11:00 – 11:30 a.m. PST

[Reserve Your Spot Now](#)

SuiteWorld

SuiteWorld September 9–12, 2024 | Las Vegas & On Air

[Home](#) [Sponsors](#)

Get ready for something even *Suiter!*

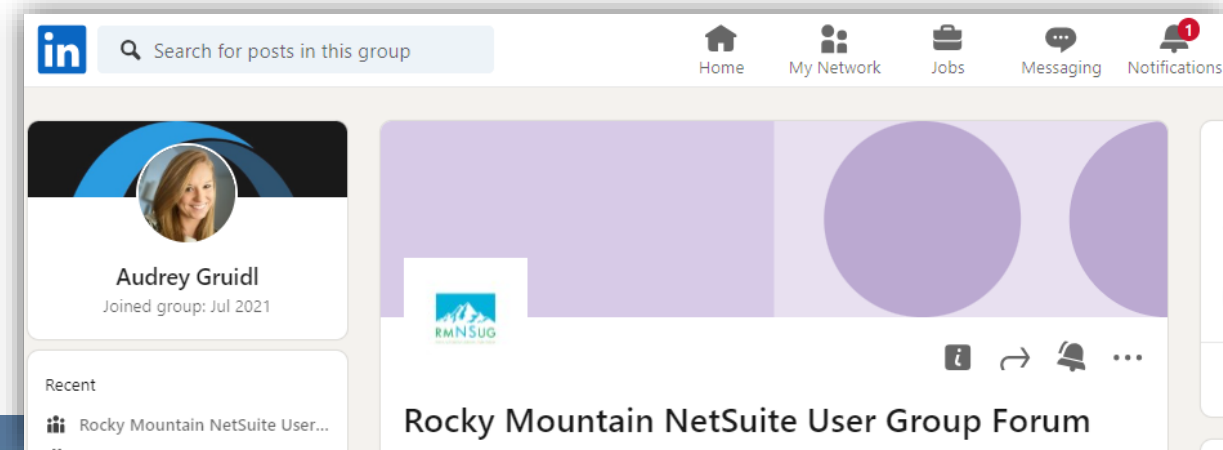
Catch us back in Las Vegas and On Air
September 9–12, 2024.

[Stay Informed](#)

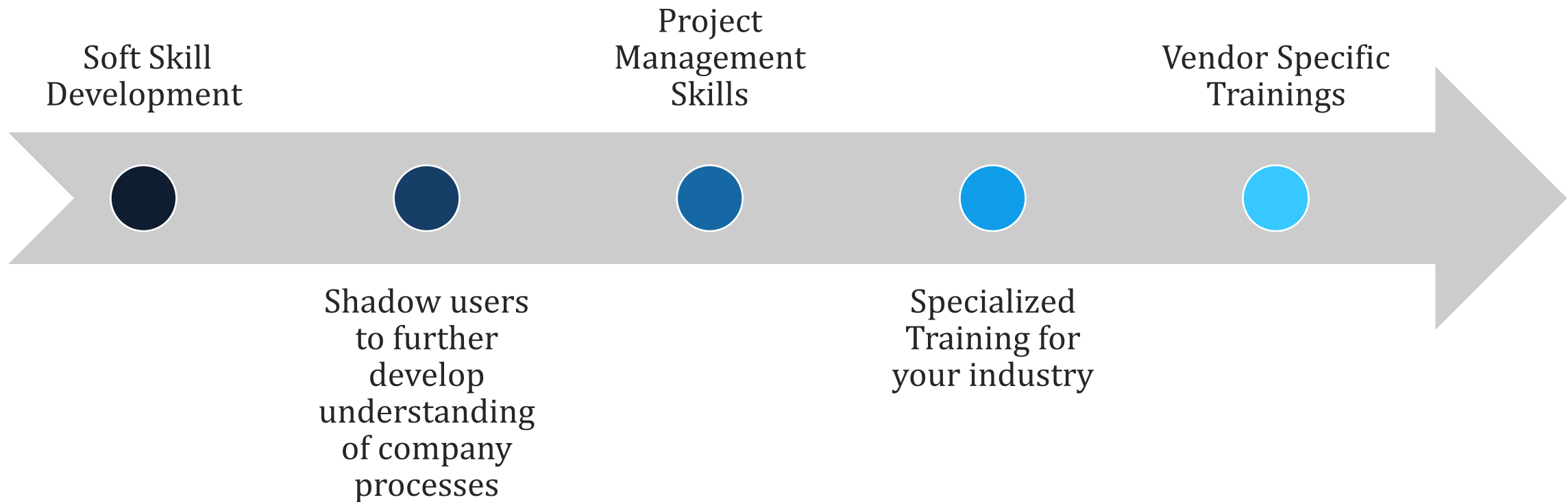


Non-NetSuite Sponsored

- **Online Resources**
 - Forums, Blogs, Webinars
- **User Groups**
 - Rocky Mountain NetSuite User Group Meetings



Professional Development



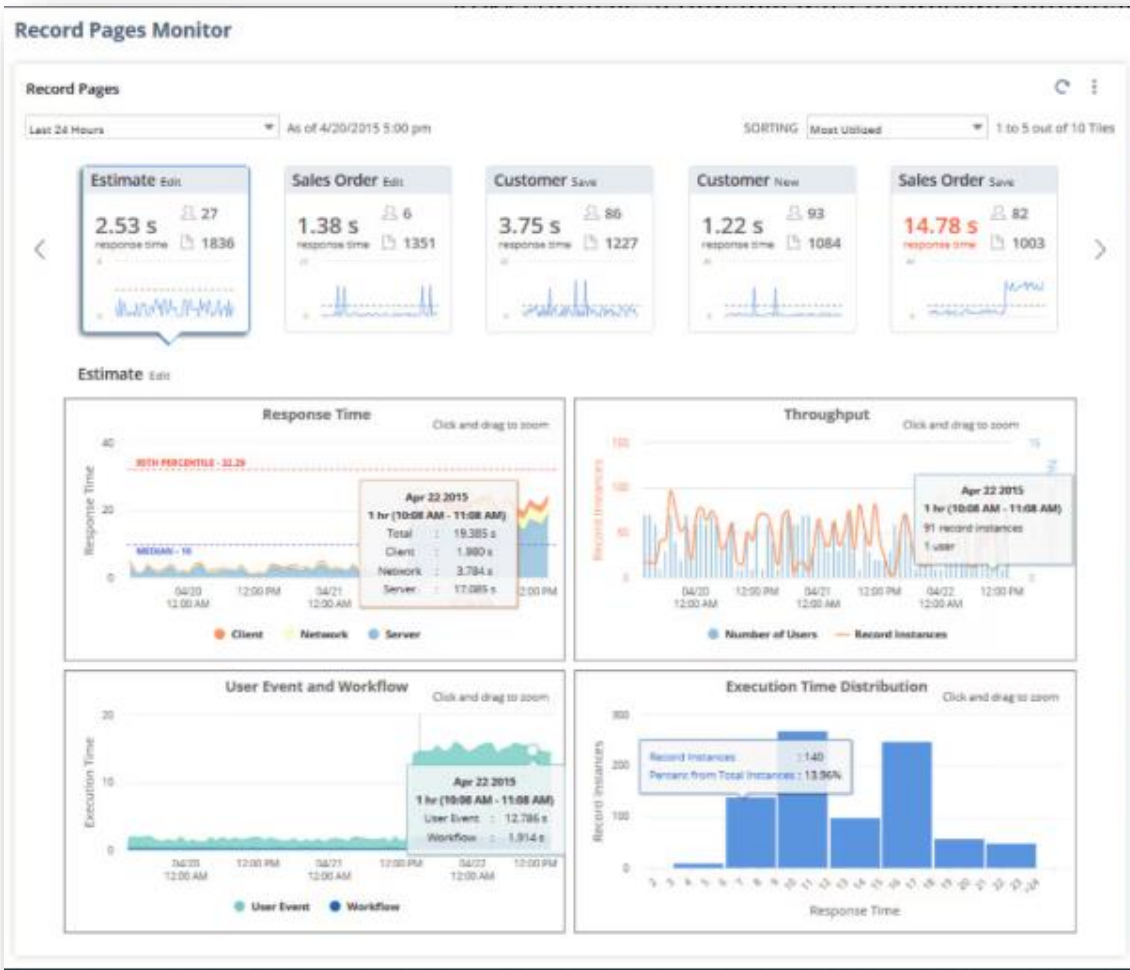
Tips and Tricks

- Bundles & SuiteApps
- Chrome Extensions
- Supporting Users

Find Efficiencies with Bundles+ & SuiteApps

- Install via the SuiteBundler --Navigation: Customization>SuiteBundler > Search & Install Bundles
- Install via the SuiteApp Marketplace--Navigation: SuiteApps

Performance



APM SuiteApp

- At-a-glance performance health dashboard to monitor issues that may affect the performance of record pages, scripts, saved searches, integrations, and processors
- Dedicated tools for each type of issue to view visualized performance data with metrics and logs
- Easily identify performance bottlenecks and other issues with detailed figures and charts
- One convenient set up page allows administrators to grant access to multiple roles and employees

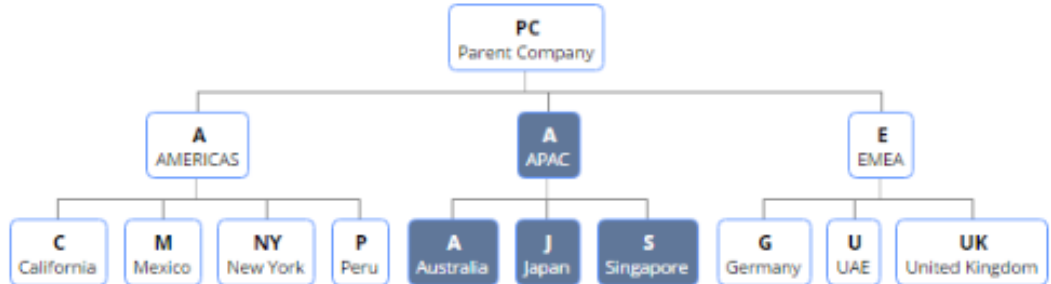
For OneWorld Accounts

Subsidiary Navigator

- Allows OneWorld account executive to have the ability to conveniently switch through subsidiaries from the Subsidiary Navigator dashboard portlet
- Lists, searches, reports, portlets and other supported records are filtered to the subsidiary when you click a node in the subsidiary navigator portlet.

Subsidiary Navigator

Settings Help



```

graph TD
    PC[PC Parent Company] --> A1[A AMERICAS]
    PC --> A2[A APAC]
    PC --> E[E EMEA]
    A1 --> C[C California]
    A1 --> M[M Mexico]
    A1 --> NY[NY New York]
    A1 --> P[P Peru]
    A2 --> A3[A Australia]
    A2 --> J[J Japan]
    A2 --> S[S Singapore]
    E --> G[G Germany]
    E --> U[U UAE]
    E --> UK[UK United Kingdom]
  
```

Opportunities

TOTAL: 3 VIEW Opportunities without ... week (per subsidiar QUICK SORT

NEW	EDIT VIEW	TITLE	CUSTOMER	SUBSIDIARY
	Edit View		26 DG Holdings	Parent Company : APAC : Australia
	Edit View		26 DG Holdings	Parent Company : APAC : Australia
	Edit View		27 MD Solutions	Parent Company : APAC : Singapore

Free Bundle Quick Wins

File Drag and Drop

← → List Search Customize

Drop files here. Click for more options.

Summary	
SUBTOTAL	1,300.00
DISCOUNT ITEM	
TAX TOTAL	0.00
TOTAL	1,300.00


- Easily drag file from outside location to NetSuite and will attach to record with files subtab.

Sticky Notes

StickyNotes ▾ New:

3/10/2024 10:45 am
 To: Audrey Gruidl
 Test 123

- Audrey Gruidl

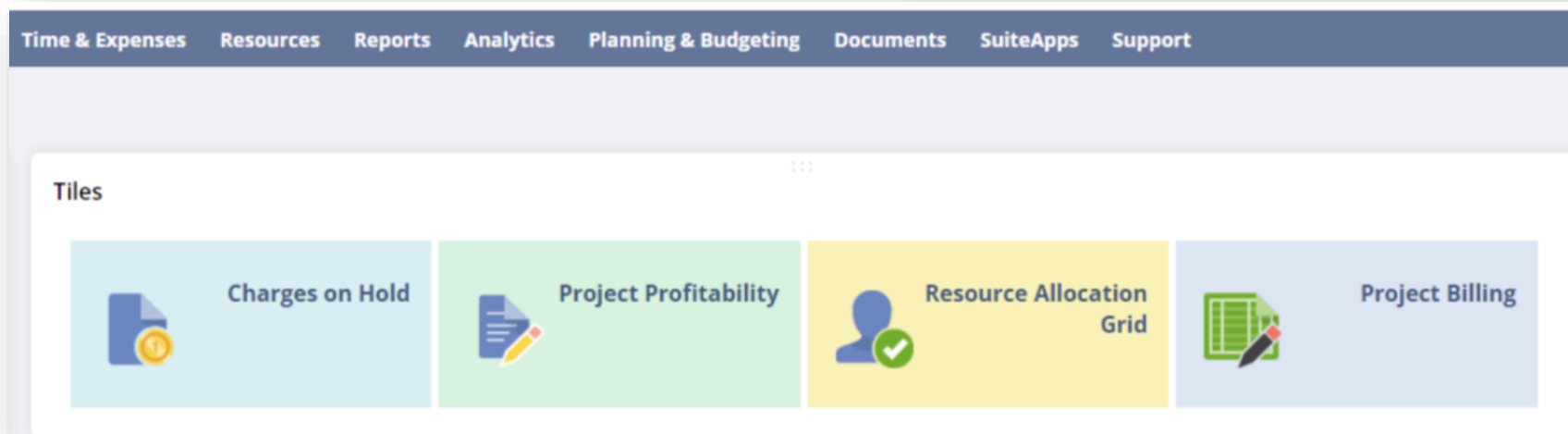
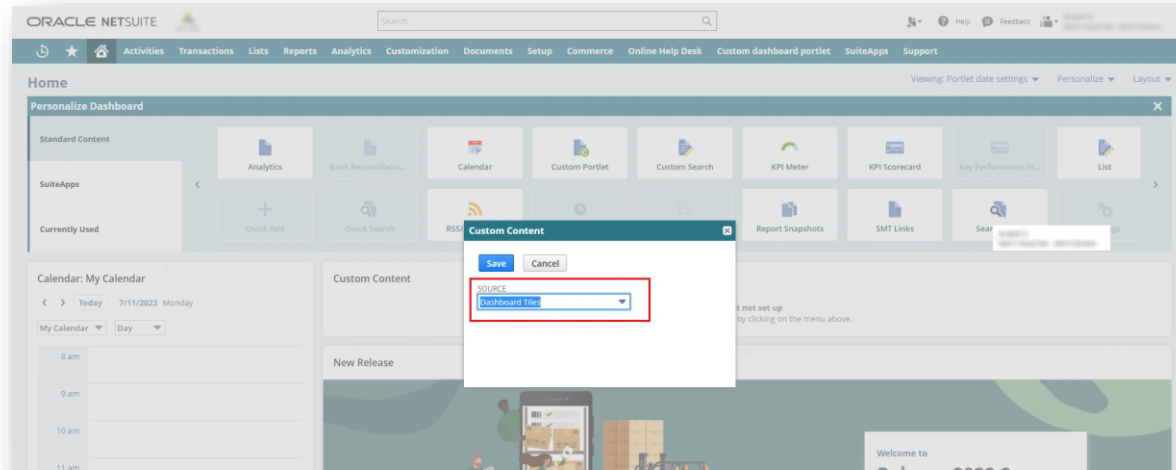


- Enables you to write private notes or share notes on records, transactions, or certain fields on a form across your colleagues.
- You can manage notes on a board where you can sort, filter, archive, delete, reply.

For Analysis

Dashboard Tiles

Enables you to create a dashboard with tiles that display business critical KPIs in a bold visual layout, with images and blinking alerts.



SuiteApps – Cost Associated

StrongPoint

- SOX Compliance & Audit Prep
- Segregation of Duties Management
- Automatic Documentation
- Impact analysis
- Change Management
- Environment Comparison
- Master Data & Financial Controls



Fast Path

- Access reviews
- Identity Manger
- Audit trail
- Security Designer
- Risk Quantification
- Segregation of Duties

FASTPATH

WHO
HAS ACCESS TO YOUR SYSTEMS?

WHAT
CAN THEY DO WITH THAT ACCESS?

WHERE
ARE YOU AT RISK?



Custom Bundle

- **Bundling Sandbox Configuration**

- First must enable ability:
 - Setup > Company > Setup Tasks > Enable Features.
 - SuiteBundler

- **Steps to Bundle**

1. Enter basic definitions
2. Document bundle properties
3. Select objects to include
4. Set Preferences
5. Set up sharing
6. Install in production

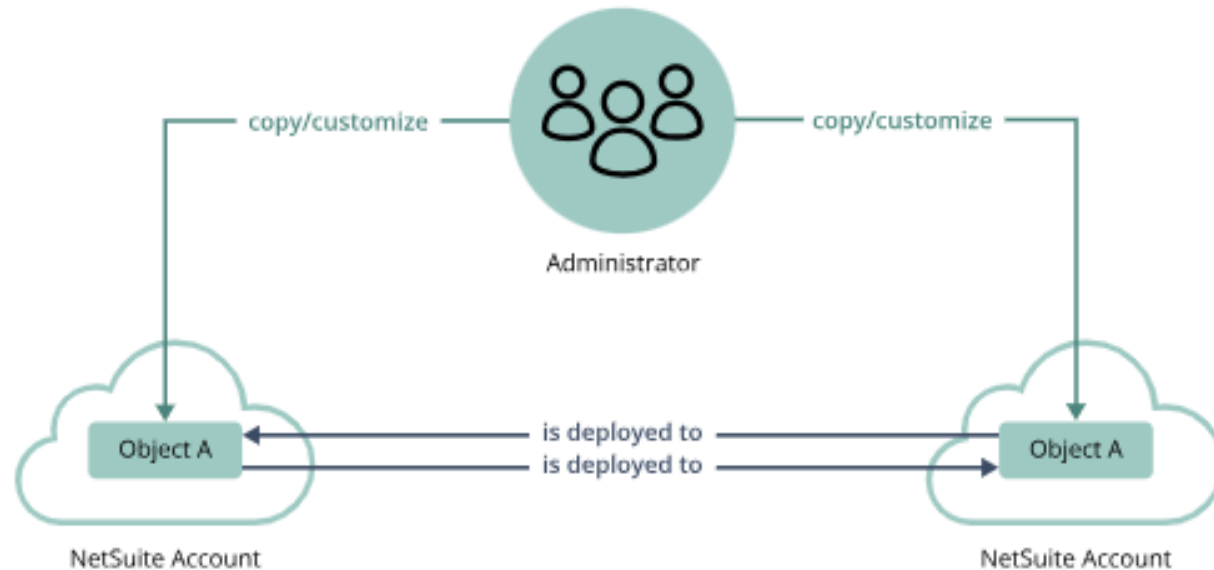
SuiteBundler

CREATE BUNDLES WITH SUITEBUNDLER

CREATE BUNDLES OF CUSTOMIZED OBJECTS (E.G. FORMS, SCRIPTS, REPORTS, ETC.) FOR INSTALLATION IN OT

Similar to Bundling...Copy to Account

- Copies a custom object between your accounts.
- Use Copy to Account to select a target account, choose dependencies, select record instances to include, then preview and deploy your custom record.
- The tool can copy one custom object (including dependencies and instances) at a time.
- Available from Production, development, and sandbox accounts in which you have administrator access

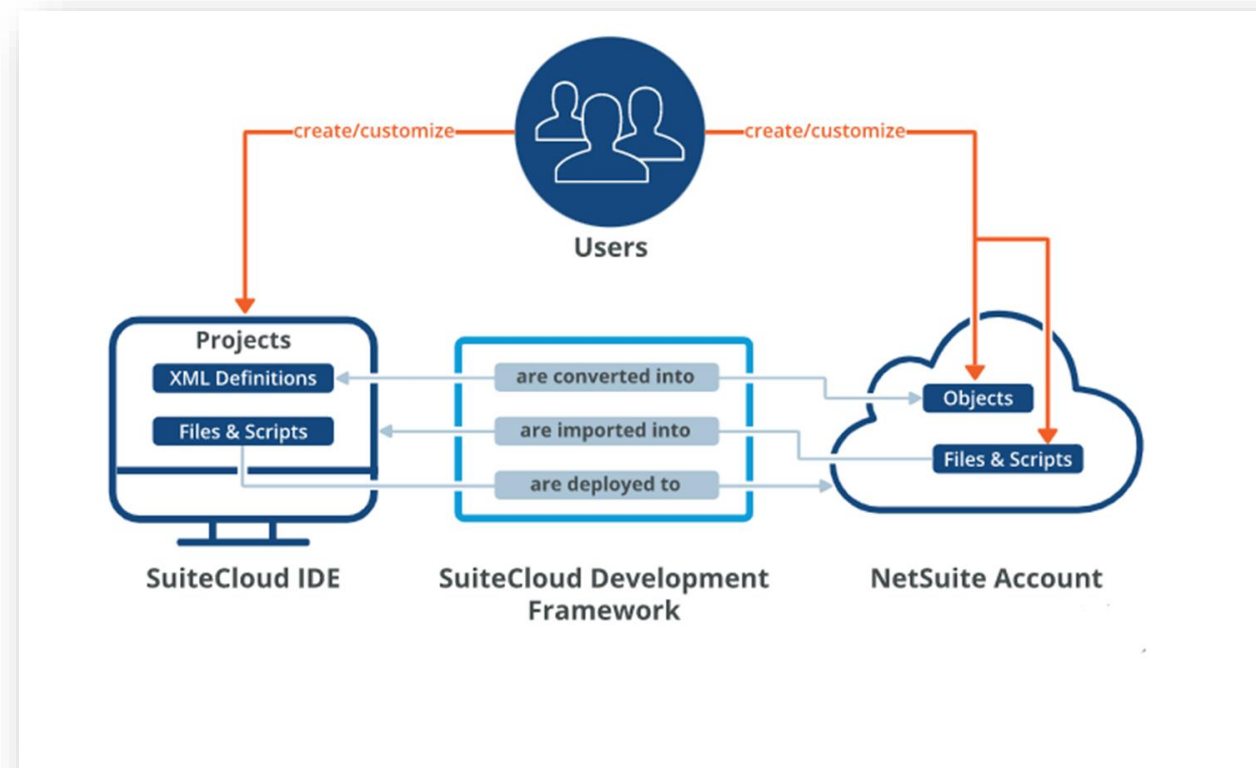


Next Evolution: SDF (SuiteCloud Development Framework)

Provides a foundation for a structured development process and supports familiar development concepts and patterns

Use SDF to recreate SDF Project Components (or customizations) for internal use or commercial distribution

File Based Projects with XML Definitions that may contain custom records, forms, workflows and scripts



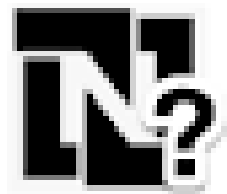
SDF vs. Bundles: Key Differences

SDF
is...

- Fully integrated with IDE – managed outside of NetSuite account
- Projects live as set of XML files on local computer
- Con: Stable internet connection required for download or upload of project from/to NetSuite
- Some objects not supported in SDF yet
- *See SuiteAnswers 109161 for the full list of object comparison between SDF, Copy to Account, and SuiteBundler*
- Can export from account to XML files stored on computer in SDF Project
- Able to manually modify exported data before importing (default values, ids, add fields, etc.)
- Must manually upgrade to new versions of SDF
- SDF has better management over what gets moved, and has more granularity and detail on deployment issues
- SDF may need technical skills to troubleshoot deployment issues

Navigate NetSuite more easily with Chrome Extensions

In Google Chrome, search Chrome Extensions



NetSuite Advanced Field Help

Purpose: Extends the NetSuite Field Help and adds relevant information to improve your productivity.

Sales Order **SLS00001517** Marcel Pestana_2 PENDING APPROVAL

Save Cancel Reset Delete Actions

Primary Information

CUSTOMER * Marcel Pestana_2

ORDER # SLS00001517

PO #

TERMS

DATE * 2/27/2017

Sales Information

OPPORTUNITY

LEAD SOURCE

JOB

EMAIL

CONTACT(S)

PROMISE DATE 3/3/2017

LOCATION

CLASS

DEPARTMENT

CUSTOM FORM *

Field Help

If you customized a sales order form, select it here, or click New to customize a new sales order form.

Field ID: customform
Field Value: 174
Field Text: Sales Order Form

Internal Id	Text
164	Basic Sales Order Form
103	Sales Order - Cash Sale
188	Sales Order - Gross Profit
126	Sales Order Form
186	Multi-Ship To / Multi Location Order
184	Cash Sale
174	Sales Order Form

Click on the label to see the details

It adds the field value, text and dropdown options

PRODUCT IMAGE

Field Help

This is a custom field created for your account. Contact your administrator for details.

Field ID: custitem_product_image

Custom Field: [Product Image](#)

Field Type: Image

Adds a link to the custom field



NetSuite Field Finder

Purpose: Allows user to quickly find fields in Saved Search and Workflows. Also provides additional details about fields in dropdown

Criteria **Results** Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY: Name DESCENDING

OUTPUT TYPE: Normal

THEN: Filter by Name or ID Standard Custom Related

Field Name	Field ID	Field Type	Field Format
External ID	externalid	Standard Field	TEXT
Formula (Currency)	formulacurrency	Standard Field	CURRENCY
Formula (Date)	formuladate	Standard Field	DATE
Formula (Date/Time)	formuladatetime	Standard Field	DATETIME
Formula (HTML)	formulahtml	Standard Field	TEXT
Formula (Numeric)	formulanumeric	Standard Field	FLOAT

Showing 18 of 18 fields. NetSuite Field Finder 0.28

Buttons: Add, Cancel, Insert, Remove, Move Up, Move Down, Move To Top, Move To Bottom



NetSuite Field Explorer

Purpose: Examine
the fields in a
NetSuite record



Netsuite Field Explorer

by Michael Chaikin (michael@gmail.com)



Buy me a coffee

Filter items

```

balance: -917.00
balreadyrefunded: "F"
baserecordtype: "invoice"
billingaddress2_set: "var subrecord = nlapiViewSubrecord('billingaddress');
var addresstext;
if (subrecord) {
    addresstext = subrecord.getFieldValue('addrtext');
} else {
}
nlapiSetFieldValue('billingaddress_text', addresstext);"
billingaddress_type: "shipaddr"
billisresidential: "F"
canhavestackable: "T"
carrier: "nonups"
checkcommitted: "F"
class: "212"
companyid: "15"
consolidatebalance: "-1112.00"
createddate: "2/6/2024 4:29 pm"
currency: "1"
currencyname: "US Dollar"
currencyprecision: "2"
currencysymbol: "USD"
custbody_atlas_exist_cust_hdn: "2"
custbody_atlas_new_cust_hdn: "1"
custbody_atlas_no_hdn: "2"
custbody_atlas_yes_hdn: "1"
custbody_ava_custexternalid: "testcustomer@email.com"
custbody_ava_customduty: "0.00"
custbody_ava_customercompanyname: "test customer"

```



Linkclump

Purpose: Allows you open, copy or bookmark multiple links at the same time.

Welcome to the options page, where you can change the default behaviour and add new actions. If you have forgotten how linkclump works then click guide for a reminder. Source code is available on [GitHub](#). You can find me on twitter [@benblack86](#).

Guide

Do you love linkclump? Then please leave a rating, it will only take a few seconds. Thank you :-)

Rate

Actions

Opened as New Tabs

Activate by Right mouse button

- smart select: on
- block repeat links in selection: true
- selection box color:

Delete

Edit

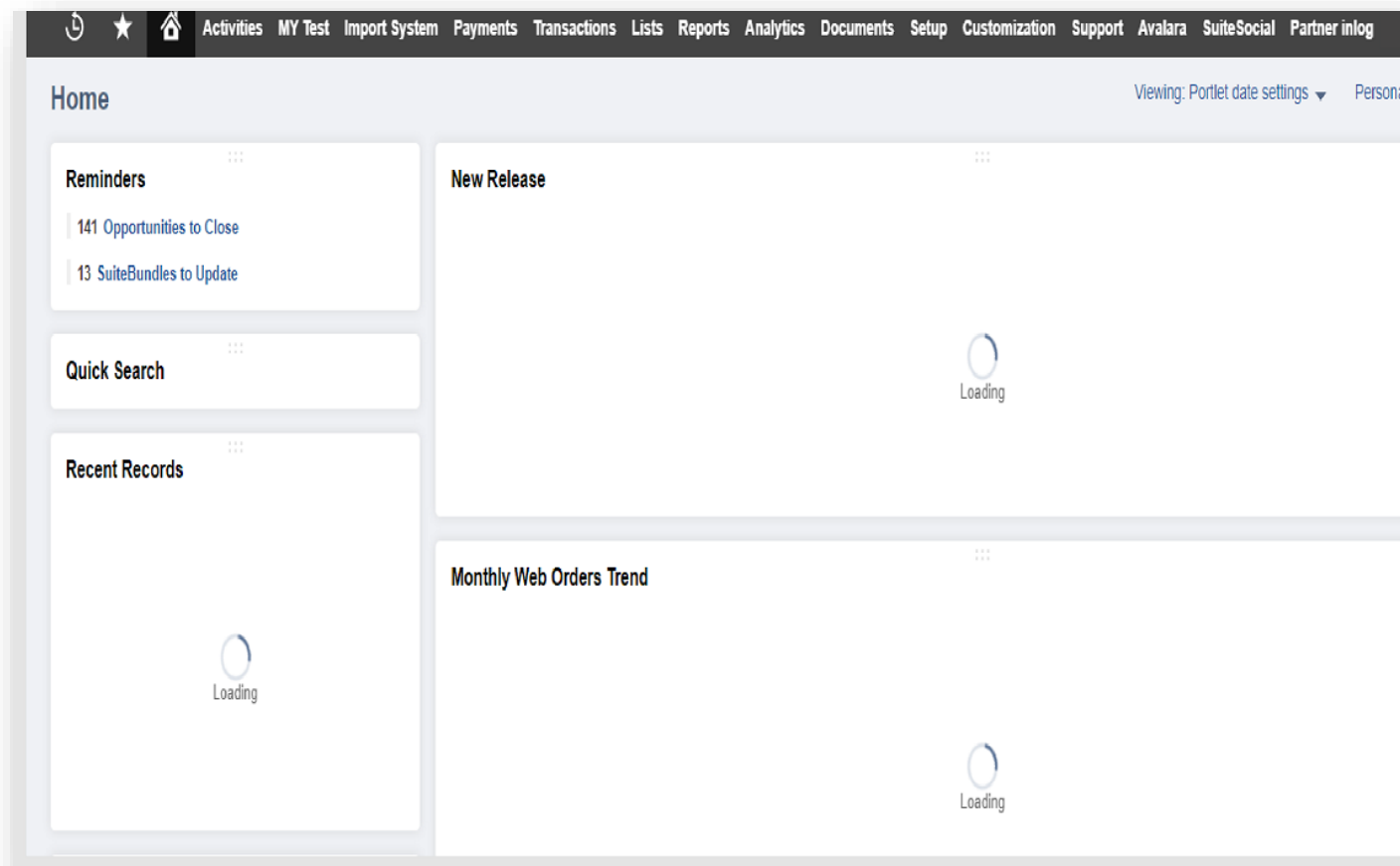
Add Action

EDIT VIEW	LEGACY ID	DOCUMENT NUMBER	INTERNAL ID	EXTERNAL ID
View	001-115086	001-115086	2107341	
View	001-115086	001-115086	2107341	
View	001-115086	001-115086	2107341	



NetSuite Portlet Refresher

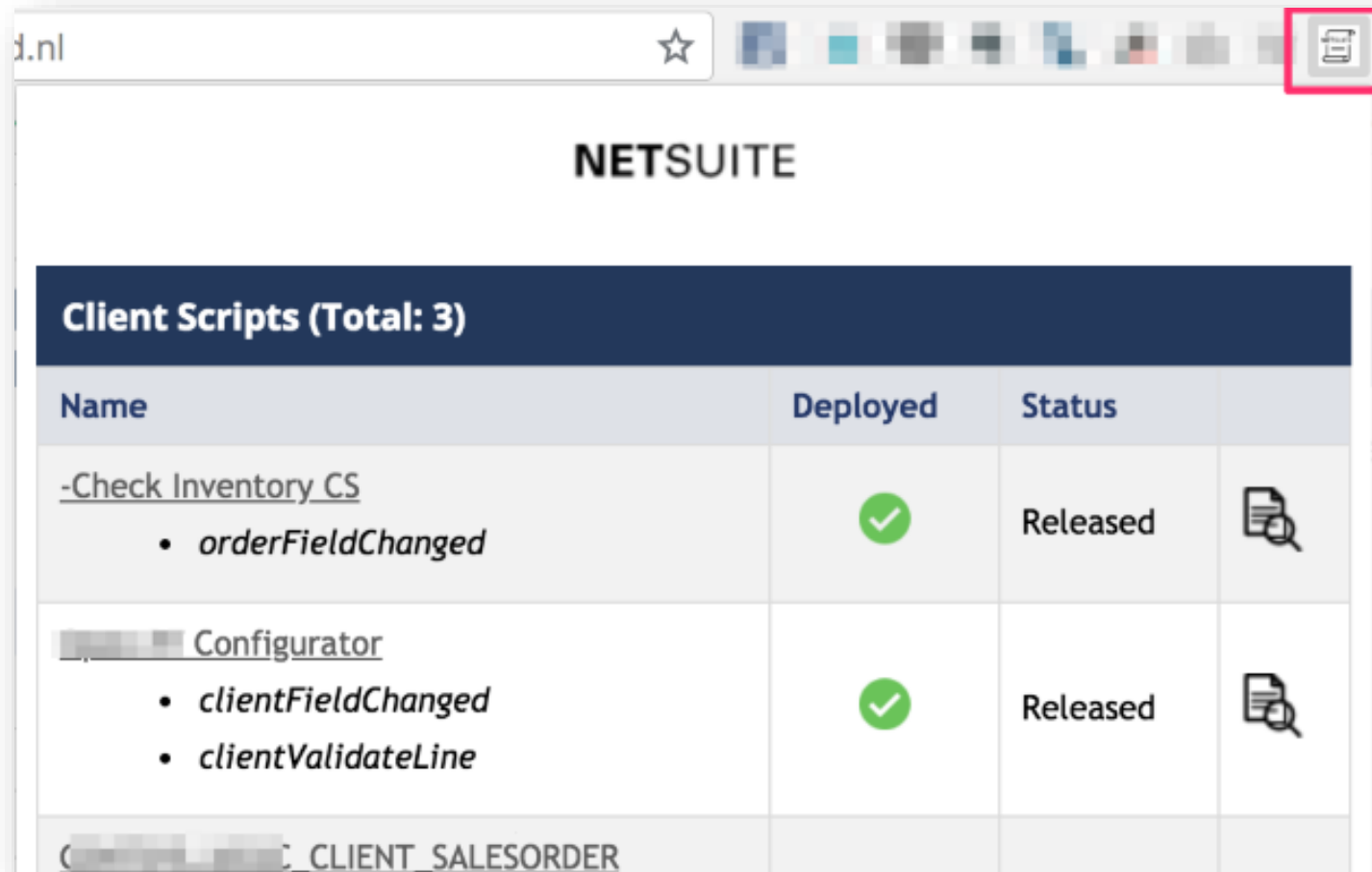
Purpose: Refreshes the portlets in your NetSuite Dashboard Automatically every time you login or access your NetSuite Home Page





NetSuite Scripted Records

- Purpose: See the customizations deployed to your record



The screenshot shows the NetSuite interface for Client Scripts. The browser address bar shows ".nl" and a star icon. The page title is "NETSUITE". The main heading is "Client Scripts (Total: 3)". Below this is a table with columns: Name, Deployed, Status, and an action icon. The first row shows a script named "-Check Inventory_CS" with a green checkmark in the Deployed column and "Released" in the Status column. The second row shows a script named "Configurator" with a green checkmark in the Deployed column and "Released" in the Status column. The third row is partially visible, showing "CLIENT SALESORDER".

Name	Deployed	Status	
-Check Inventory_CS • <i>orderFieldChanged</i>	✓	Released	
Configurator • <i>clientFieldChanged</i> • <i>clientValidateLine</i>	✓	Released	
CLIENT SALESORDER			

Tips to Support Users



Finding Efficiencies to Support Users



NETSUITE ORG
CHART



FUNCTIONAL
DOCUMENT



DESIGN
DOCUMENTS



FIELD HELP

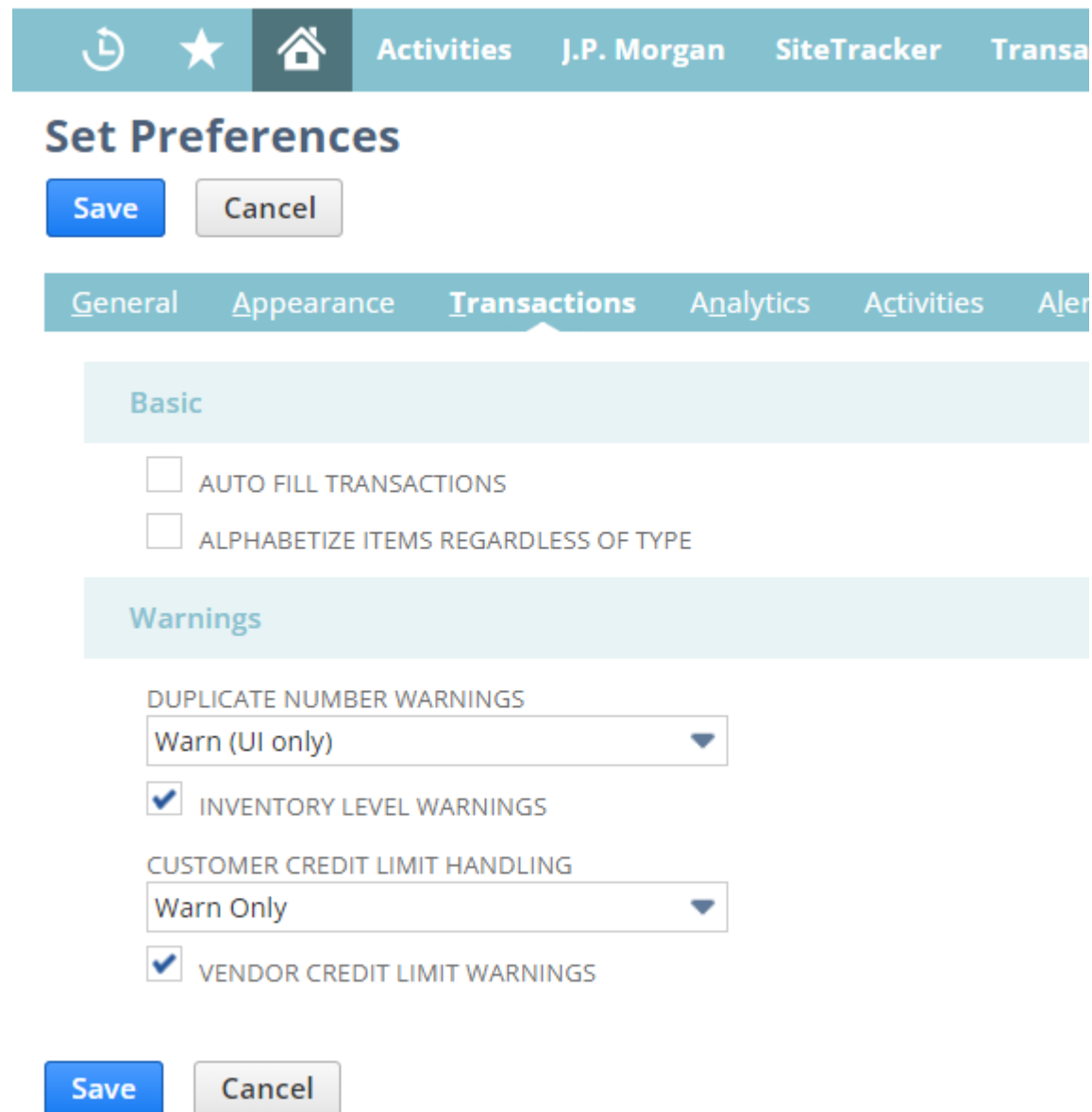
Set Preferences

General

- Show Internal IDs

Transactions

- Warnings
 - Duplicate Numbers
 - Customer Credit Limit Handling



Set Preferences

Save Cancel

General Appearance **Transactions** Analytics Activities Alerts

Basic

AUTO FILL TRANSACTIONS

ALPHABETIZE ITEMS REGARDLESS OF TYPE

Warnings

DUPLICATE NUMBER WARNINGS

Warn (UI only) ▼

INVENTORY LEVEL WARNINGS

CUSTOMER CREDIT LIMIT HANDLING

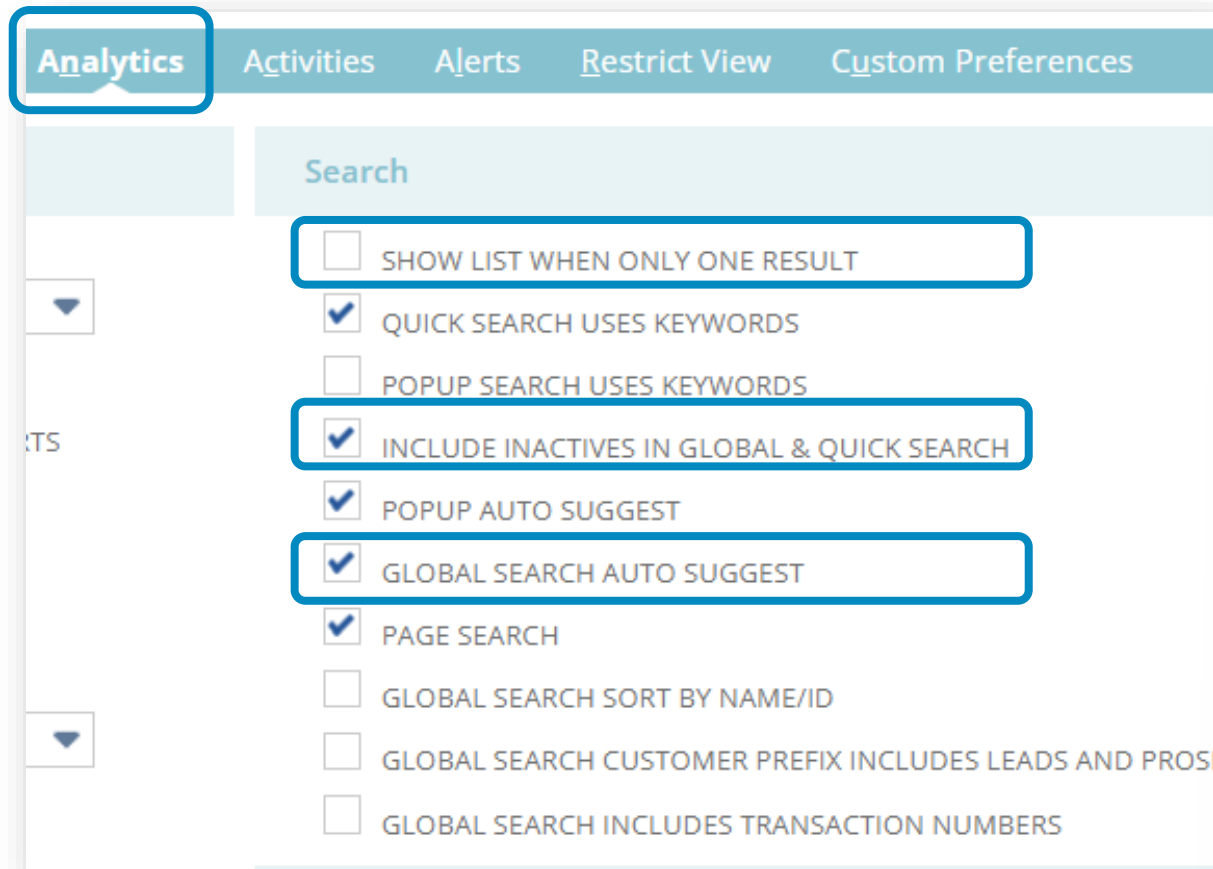
Warn Only ▼

VENDOR CREDIT LIMIT WARNINGS

Save Cancel

Set Preferences

Analytics



The screenshot shows the 'Analytics' preferences page in NetSuite. The 'Search' section is highlighted with a blue bar. Several options are checked and highlighted with blue boxes:

- SHOW LIST WHEN ONLY ONE RESULT
- QUICK SEARCH USES KEYWORDS
- POPUP SEARCH USES KEYWORDS
- INCLUDE INACTIVES IN GLOBAL & QUICK SEARCH
- POPUP AUTO SUGGEST
- GLOBAL SEARCH AUTO SUGGEST
- PAGE SEARCH
- GLOBAL SEARCH SORT BY NAME/ID
- GLOBAL SEARCH CUSTOMER PREFIX INCLUDES LEADS AND PROSPECTS
- GLOBAL SEARCH INCLUDES TRANSACTION NUMBERS

Search

- Show List when Only One Result
 - If left unchecked, NetSuite will auto-load a record when a search yields only one result
- Include Inactives in Global & Quick Search
- Global Search Auto Suggest box
 - Uncheck if you do not want a list of suggested matches to display for global searches, you can disable this feature.

Set Preferences

Analytics

Set Preferences

Save

Cancel

General

Appearance

Transactions

Analytics

Act

Reporting

REPORT BY PERIOD

Financials Only

SHOW REPORTS IN GRID

CUSTOMIZE FONT ON FINANCIAL REPORTS

PRINT COMPANY LOGO

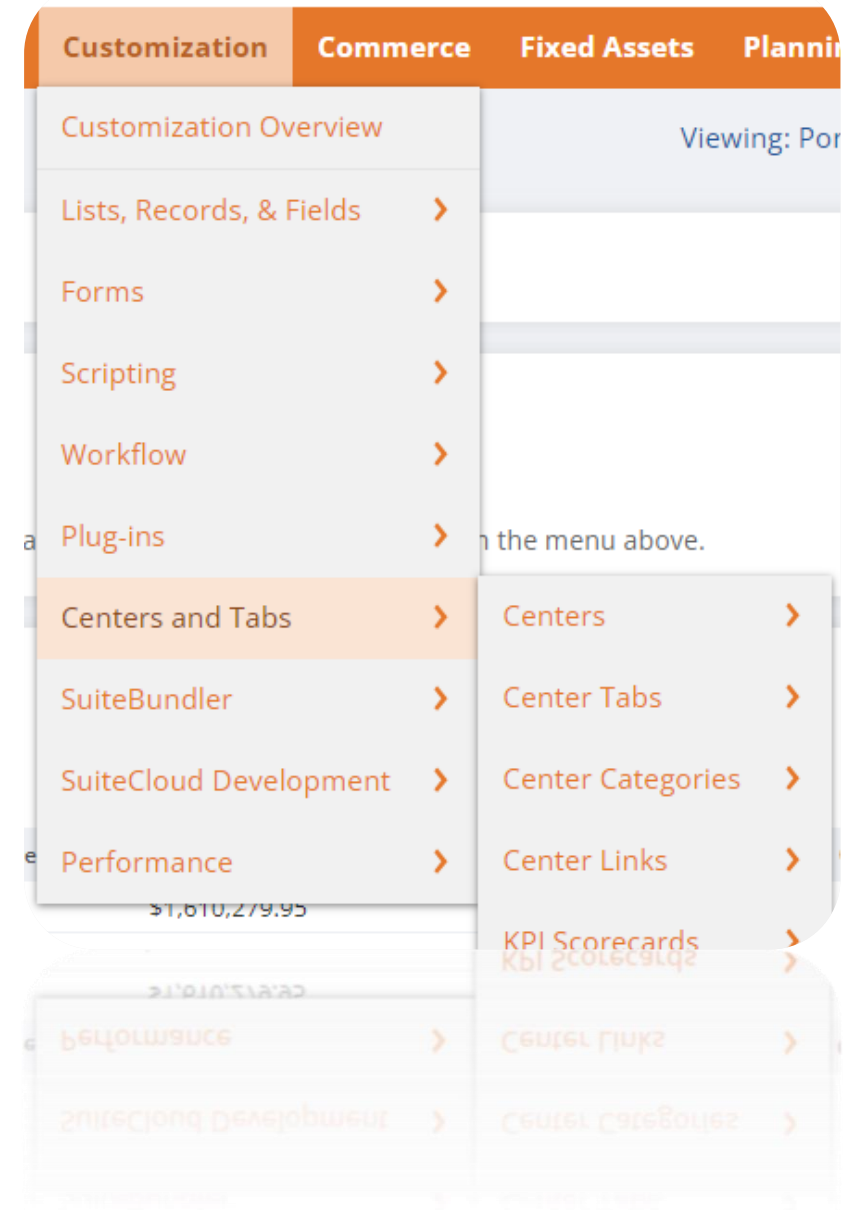
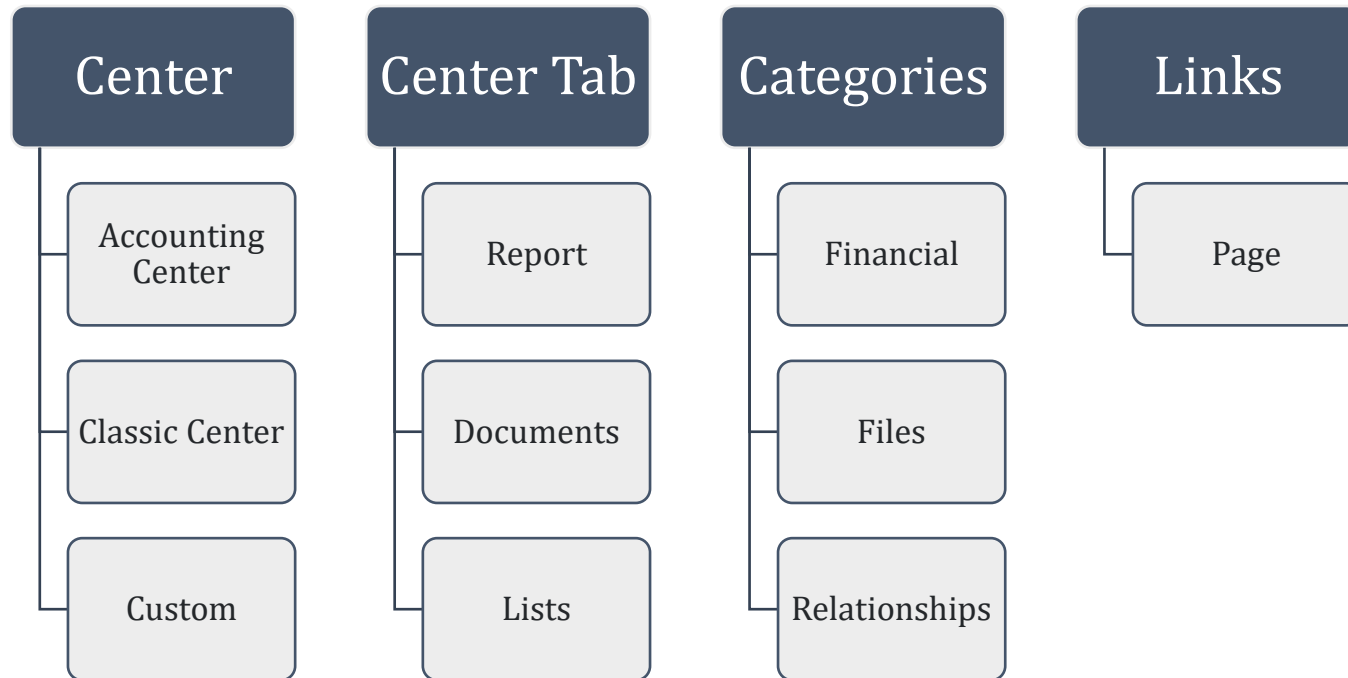
DISPLAY REPORT TITLE ON SCREEN

DISPLAY REPORT DESCRIPTION

Reporting

- Report by period
 - **Financials only** (Specific reports to be reported by period – full list in help center)
 - **All Reports** – all reports will show by period, no date selection
 - **Never** – all reports able to run by date (if you want to run your balance sheet on a specific date vs period)

Centers and Tabs



Centers and Tabs

🕒 ★ 🏠 Activities SiteTracker J.P. Morgan Transacti

Center Category

LABEL *

Financial Reports

ID
custcentercategory_bpc, _finreports_ac

CENTER TYPE
Accounting Center

LINK *

Income Statement
EBITDA Income Statement
Balance Sheet
Trial Balance
Trial Balance_With Segments
Comparative Balance Sheet

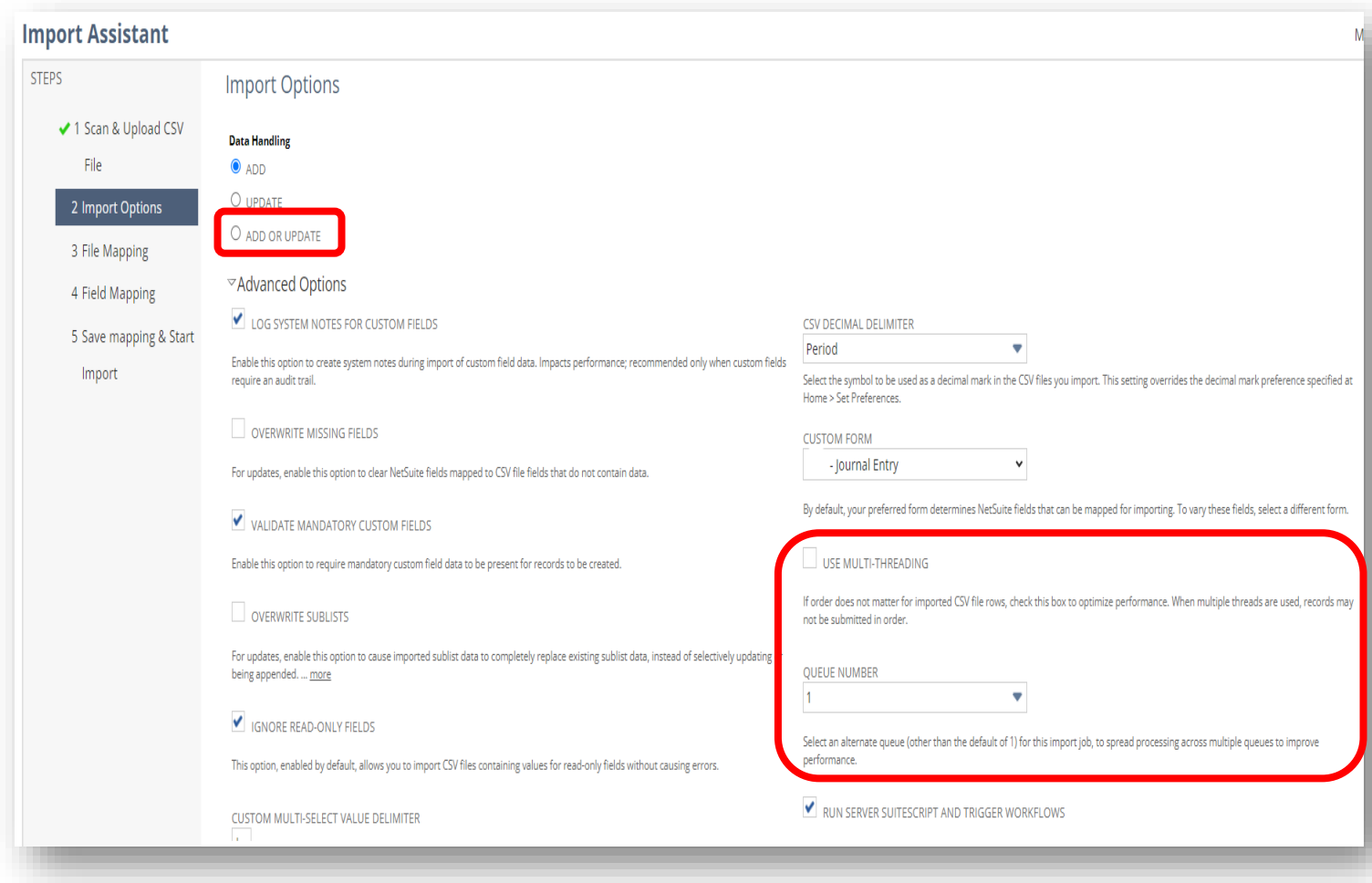
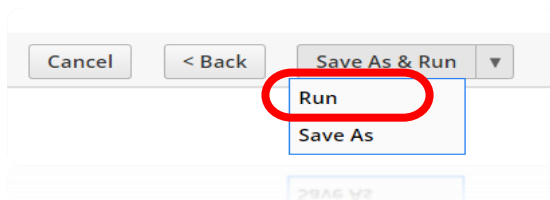
Reports Analytics Documents Setup Customization Commerce Fixed

- Reports Overview
- New Report
- New Financial Report
- Recent Reports >
- New Search
- Custom WIP Reporting >
- Saved Reports >
- Financial Reports >**
 - Income Statement >
 - EBITDA Income Statement >
 - Balance Sheet >
 - Trial Balance >
 - Trial Balance_With Segments >
- Scheduled Reports >
- Saved Searches >
- Scheduled Searches >
- Financial >

CENTER TAB
 Financial
 INSERT BEFORE
 - Unchanged -

Saved CSV Imports

- Build out for team for repeated imports
- Standard templates & CSV for all to use
 - Leverage ability to set defaults
- Remind team members to just RUN import



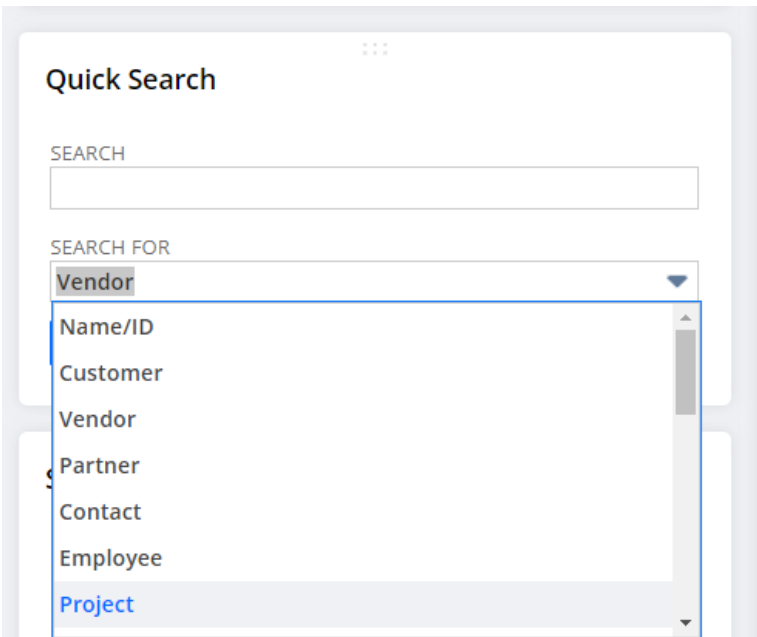
Search Tips

Global Search

- Use Keywords between 3 and 32 characters
- Use Search Prefixes (Full list in SuiteAnswer 8402)
 - For Customers, start with “CU:” or “CU^”
- Searching for Multiple strings at the same time
 - Use OR as a separator (OR must be uppercase)
 - Example Max OR Macs OR Machs
- Wild Card: %
 - Inv:99 **vs.** Inv:99% **vs.** Inv:%99
- Inactive Records
 - Add a “+” at the end of your characters to return both active and inactive results
 - Example: “cu:max+”

Quick Search

- Via Home Page portlet, search by record type



Quick Search

SEARCH

SEARCH FOR

Vendor

Name/ID

Customer

Vendor

Partner

Contact

Employee

Project

How to be a Great NetSuite Administrator



Maximizing your Investment of NetSuite through Administrator Function



Understanding the Role of a NetSuite Administrator



Key Functions & Best Practices



Issue Management & Monitoring



Continuous Learning & Professional Development



Tips & Tricks for NetSuite Administrators

THANK YOU

- Audrey Gruidl at agruidl@bridgepointconsulting.com
- Brian Schmidt at bschmidt@bridgepointconsulting.com