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NetSuite Symbols and Short Cuts

NetSuite is jam packed with usability that allows you to efficiently accomplish tasks and find information. Here is a list of helpful tools.

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Edit / View

All records can be accessed in Edit or View mode. Edit mode is used when filling out a record for the first time or changing information in a record. View mode is used when searching customer records to verify information. You can only progress to a quote, opportunity or sales order in view mode.
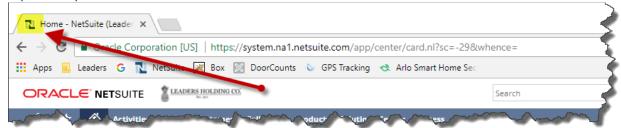
What	Where	Why	Note
Edit	The choice to Edit a record will be on the record line item usually on the right side. If you are in a record in View mode there will be a button on the top of the page to edit the record.	Opening a record in Edit mode allows you to update or change information	Any changes in Edit mode must be saved to make them a part of the record. If you forget to save the changes the information will have to be reentered. When you look at a record in Edit mode you will not have the same options to move forward that you do in View mode. You must save the record to progress.
View	The choice to View a record will be on the record line item usually on the left side or you may have the choice to click on the line item itself If you are in a record in Edit mode hit the save button at the top or bottom of the page to enter View mode	Opening the record in View mode allows you to review data and take the record forward to next step. For example take a customer record to a new Sales Order.	When you are in View mode you cannot edit individual fields. There will be an Edit button when in view mode that will take you to Edit mode if you need to make changes to the record.

NetSuite is Thinking

When using a computer, if it does not react immediately we often want to click again or take further action. NetSuite is a cloud (internet) based and it is important to wait and let it finish each action. Because it is cloud based it may perform slower at times. You can always tell if NetSuite is processing your request by looking at the header of your open web page.
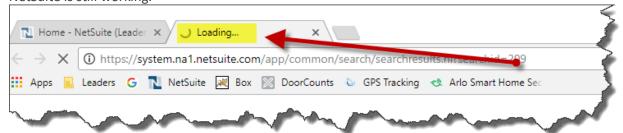
Waiting for Next Task

When NetSuite has fully loaded the request and ready for the next task you will see the NetSuite Icon ( ) in the top left on your current tab

Busy Loading the Request

When NetSuite is loading your request you will see a loading and a spinning arrow on the tab. Clicking buttons and hitting keys will not speed it up. Please note that even if the page is not blank, and the arrow is still spinning, NetSuite is still working.

Some time there will be a "Waiting" message in the bottom left of your screen.

Global Search

What

This is a search box that searches all of NetSuite. Think of a Google search but only within the company information. It is a very powerful tool. Because it is so powerful it can be a bit overwhelming until you get the hang of it. The same information as all of the other search fields throughout the NetSuite can be found by searching from global search field.

Where

The global search bar can be found at the top of every page in NetSuite or can be accessed by pressing <ALT> and <G> at the same time

Advanced

There are prefixes and symbols that can be used by advanced users to refine their search. It is not necessary to learn these prefixes and symbols but if you do you will be able to find what you are looking for faster with fewer steps. Tutorial documents and videos can be found on the internet by searching "NetSuite Global Search Tips & Tricks."

 Home Button

What

The Home Button takes you back to the main dashboard screen, the screen you see when you open NetSuite.

Where

The button is located on the top left of every screen in NetSuite

Recent Records

What

Think of it as a browsing history on your home computer. Recent Records is a way to quickly access one of the last 12 things you did.

Where

Recent Records is on the top left of every page in NetSuite. It is accessed by simply hovering your mouse over the symbol

Quick Access

What

Quick Access looks very similar to Quick Actions. Quick Access is a list of favorites or most frequently accessed forms. Leader's controls what is on the quick access of every dash board so if you have suggestions to help you and your team be more efficient please let us know.

Where

Recent Records is on the top of every NetSuite page just right of center

Quick Actions

What

Quick Actions looks very similar to Quick Access. Quick Actions are a quick reference of actions that can be taken against the record you are viewing.

Where

Quick Actions is found to the right of the button options on the top of the page in View or Edit mode.

Print

What

The print function in NetSuite is a modern print process. After hitting the button is starts with a print preview to make sure you are about to print what you want. The preview window is similar to what you see in any good printing experience.

Where

The print button will not show up in Edit mode. It will only show up in View mode. When in View mode the print button will show up to the right of the menu buttons at the top or bottom of the screen.

+   Add New

What

It gives you the ability to add the necessary information to create a record to populate the field without having to leave the page. It will pop-out a window to enter the information in.

Where

Add new is a plus mark symbol that appears next to fields that reference records

⬚   Open a Record Pop Out

What

The "Open a Record Pop Out" opens the record you have selected in a field in a new window in Edit mode. This allows you to make changes to a record, save the changes, and move on with your original task without having to close the window.

Where

The "Open a Record Pop Out" appears next to fields that are populated with a record. For example, a customer, address, or billing methods. The "Open a Record Pop Out" will not work unless the field is populated. It does not work if the field is not populated because there would be nothing to pop out.

Open In a New Window

What

NetSuite is cloud (internet) based. It does not have many restrictions on what can be opened together. All web based systems including Google allow you to open a selection in a new window instead of leaving where you are and continuing on to the next step.

Where

This function is available on any web screen by:

1. Placing your selection arrow over the item you would like to open and pressing the roller ball in the center of your mouse. Click the roller, do not roll it.
2. Place your selection arrow over the item you would like to open , right click, select Open Link in a New Window

Form Tab view or Unrolled View

Each form in NetSuite contain a lot of information. As you have learned earlier a form can be in Edit mode for editing and View mode for carrying a record to the next step. You can also view the form in Edit or View mode in one of two formats. Tab view, the screen is compressed, the sections are turned into tabs. Unrolled view the page is stretched, and dark bars separate the sections as you move down the screen. NetSuites default is Unrolled. Unrolled is good for first time users Most users like Tab view. You can toggle the view mode by clicking on the that appears on the right of the bold lines when you hover over ▭ or ▭ on the right side of the line.

Unrolled View

Tab View