NETSUITE

Introduction to NetSuite

NetSuite is a premier cloud-based business operating software owned by Oracle. Here are some tips to help you get the fastest start learning to efficiently use the system. Because it is cloud based and lives in your web browser, web browser best practices apply.

Table of Contents

Logging in

To Log In to NetSuite:

1. Open a web browser
2. Click the shortcut or go to: https://system.netsuite.com/pages/customerlogin.jsp
3. Type in your user name and password

Waiting for load times

NetSuite lives on the internet and is susceptible to slow periods during high web traffic or deteriorated internet speeds. The Leaders version also has many customizations that were done to help our teams be as efficient as possible navigating our high choice high service environment.
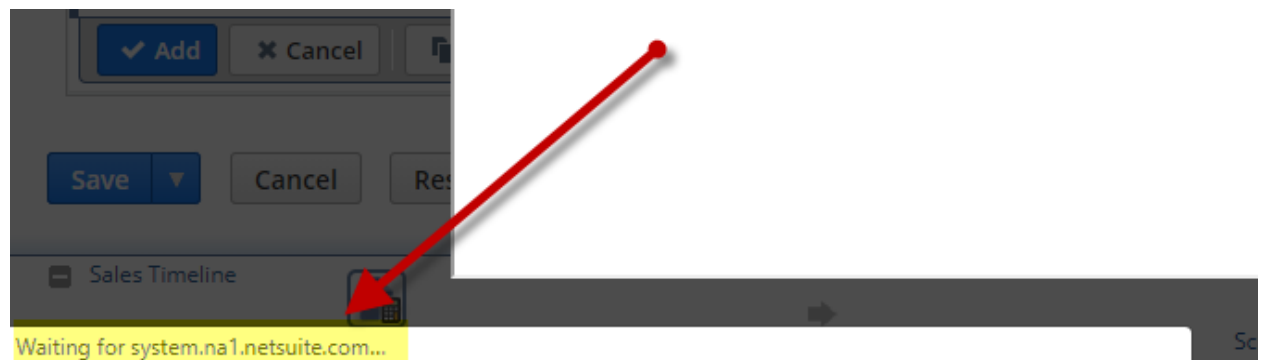
Spinning Blue Circle on the active Tab

You will see a spinning blue circle on the active tab when the page is loading
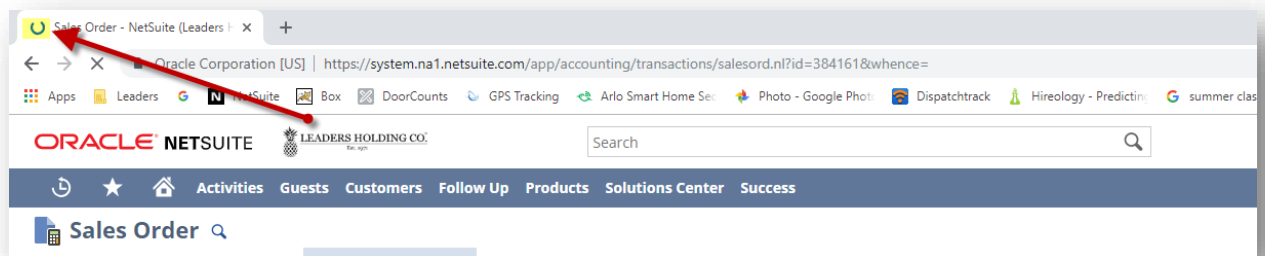

Waiting Message

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

Open in New Tab or Window browser

Because NetSuite is cloud based and runs in a web browser you can open what you want to look at in a new window so you can quickly go back to where you were. This can be done one of two ways.

1. Right Click
    a. Right click on the what you want to open in a new window
    b. Select Open in a new tab or Open in a new window
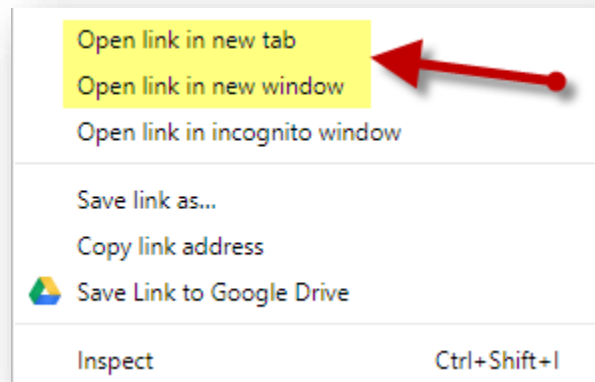
2. Click what you are trying to open using the center roll ball on your mouse.

Search the page

Searching a page is far more efficient then reading all the words. To open a search box to search a page for a key word or number:

1. Press and hold <CTRL> and at the same time press <F>.
2. Type the word you are searching for and press <ENTER>.
3. It will take you to the first instance of the word if there are any on the page.
4. Press <ENTER> again to go to the next instance if there is any.

Sticky

"Sticky" is a term used in NetSuite to describe areas that when you make a choice, they "stick" the next time you are in a screen. For instance, you can simply press Save or if you click Save & Print it will stay the next time you have the option. It will stick from the last choice. The goal of Sticky is to make you experience more efficient.

Edit / View

All records can be accessed in Edit or View mode. When filling out a record for the first time or changing information in a record Edit mode is used. When progressing through customer record to verify information while you are progressing to a quote, opportunity or sales order, View mode is used.

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 will have to be redone.

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 until you save the record. |
| View | The choice to View a record will be on the record line item usually on the right side or sometimes you 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 | When you are in view mode you cannot edit individual fields |

Sandbox

Sandbox is the term used to describe the test system of the training system. It is a copy of the live system where you can learn and practice.
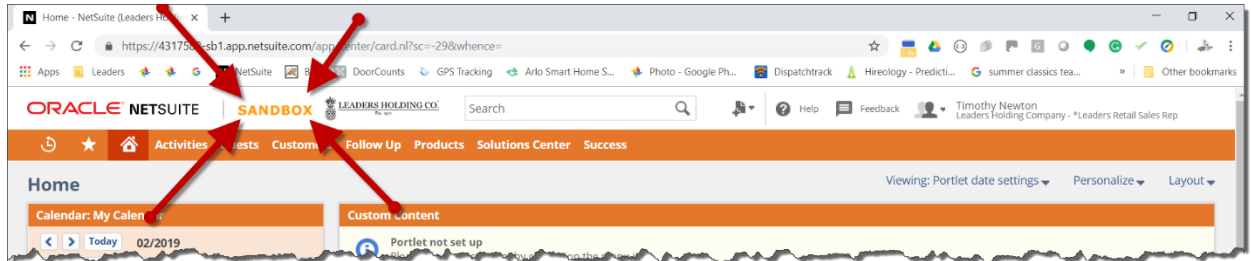
Global Search

Global search is a powerful tool for users who wish to get faster. You can search anything in NetSuite from this single point. It takes practice and a desire to learn to master the global search field.