Standard Configurations

Most users in NetSuite has their own instance. If you are not sharing an existing profile, please set up the company standard configurations as follows.

Table of Contents

Set Preferences

These are general settings to improve your user experience.

To access the Set Preferences hover over the icon and then click “Set Preferences”

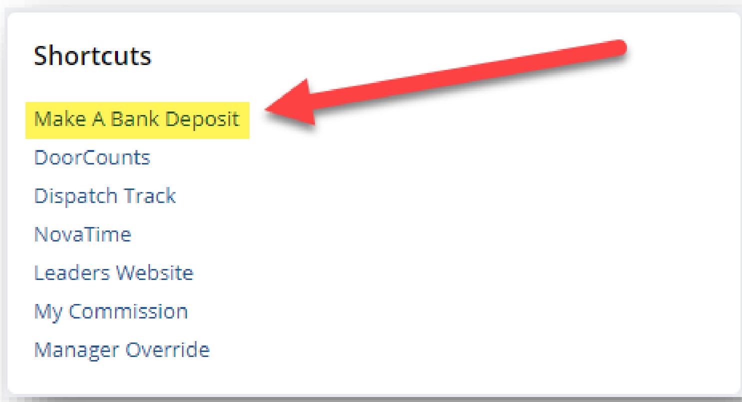
General Tab		
Nickname	User Profile - Nickname	If you do not go by your given name. Enter the name you prefer to go by here
From Email Address	User Profile – From Email Address	Type your primary stores email address in this location. This is the email address that the user roll will send emails from.
Signature	User Profile - Nickname	This will populate on all of the outgoing emails templates your transactions send to guests and customers Please use the standard HTML format. For instructions see Email Signature HTML at the end of this section.
Add Signature to Messages	User Profile – Below Signature	Enter the signature that will auto populate on your customer communication.

Appearance Tab		
Collapse Tabs in each form	Entry Forms - Un Check “Expand Tabs” On Entry Forms	This condenses the information and allows you to focus on less fields at a time. You can toggle the information on a from by selecting the tab with the information you want
Set SandBox Orange Color	Colors – Color Theme – Basic Orange	This will prevent accidentally using the Sandbox test and training environment for a customer transaction

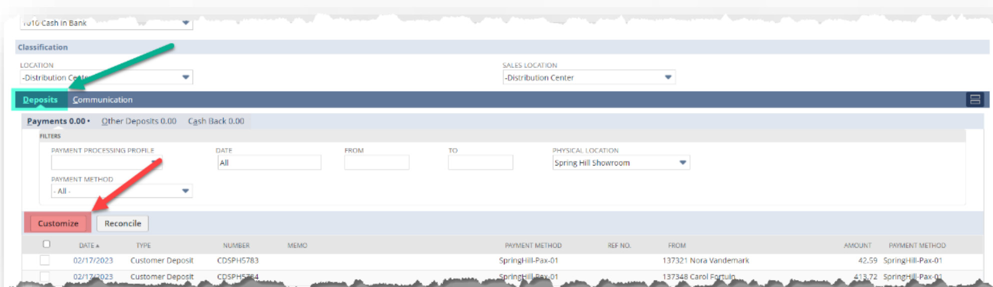
Custom Preferences Tab		
Turn Off Drag & Drop (Do Not Do for Solutions Team Members)	File Drag and Drop	Turn off all three File Drag and Drop options. This will eliminate unnecessary clutter from screens that can block functionality.

Bank Deposits

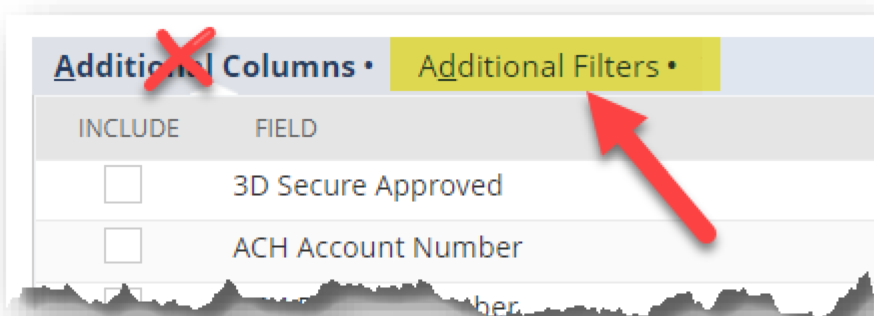
The Bank Deposit Screen that is accessible from the Shortcuts on the lower right of your home dashboard natively shows all locations. Do the following configuration to set up the report to only show your store.



1. Access the Make Bank Deposit screen
2. Click the **Customize** button on the Deposits tab



3. Click the “Additional Filters” tab



4. Check the box for the following fields
    a. Select the “Location” check box
        i. Do Not select “Current User Sales Location”
        ii. Do Not select “Sales Location”
        iii. Do Not select “To Location”
    b. Select both “Payment Method” check boxes
        i. Do Not select “Payment Method(filtered)
    c. 

5. The filters will now show. Choose your Location and Sales Location. This should be a “sticky setting” and you only will have to do this process once.

Email Signature HTML

- ✓ The signature field located In Preferences - User Profile – Below Signature must be populated in HTML. Please copy and paste the code into the Below Signature field
- ✓ Please make the changes to personalize it for you and your location

Store Team Associate

<p>Your Name
Your Location Team
Leaders Furniture®
 Your store address
 City State, Zip
(###) ###-####
 your store email</p>

The result will look like this:

Tim Newton
Bradenton Team
Leaders Casual Furniture
6303 126th Ave N
Largo, FL 33773
(727) 867-5309
bradenton@leadersfurniture.com

Store Manager

<p>Your Name
Your Location Manager
Leaders Furniture®
 Your store address
 City State, Zip
(###) ###-####
 your store email</p>

The result will look like this:

Tim Newton
Bradenton Manager
Leaders Casual Furniture
6303 126th Ave N
Largo, FL 33773
(727) 867-5309
bradenton@leadersfurniture.com

Set Items Purchased To Images

To make reviewing guests purchases visual and easy. This setting is “sticky” so once you set the filter to Images it will stay this way on all other customer records till you change it.

1. From any customer record go to the Sales tab
2. On the sales tab click the Items Purchased subtab
3. Change the View in the drop down menu to “Sublist | Customer Items with Images