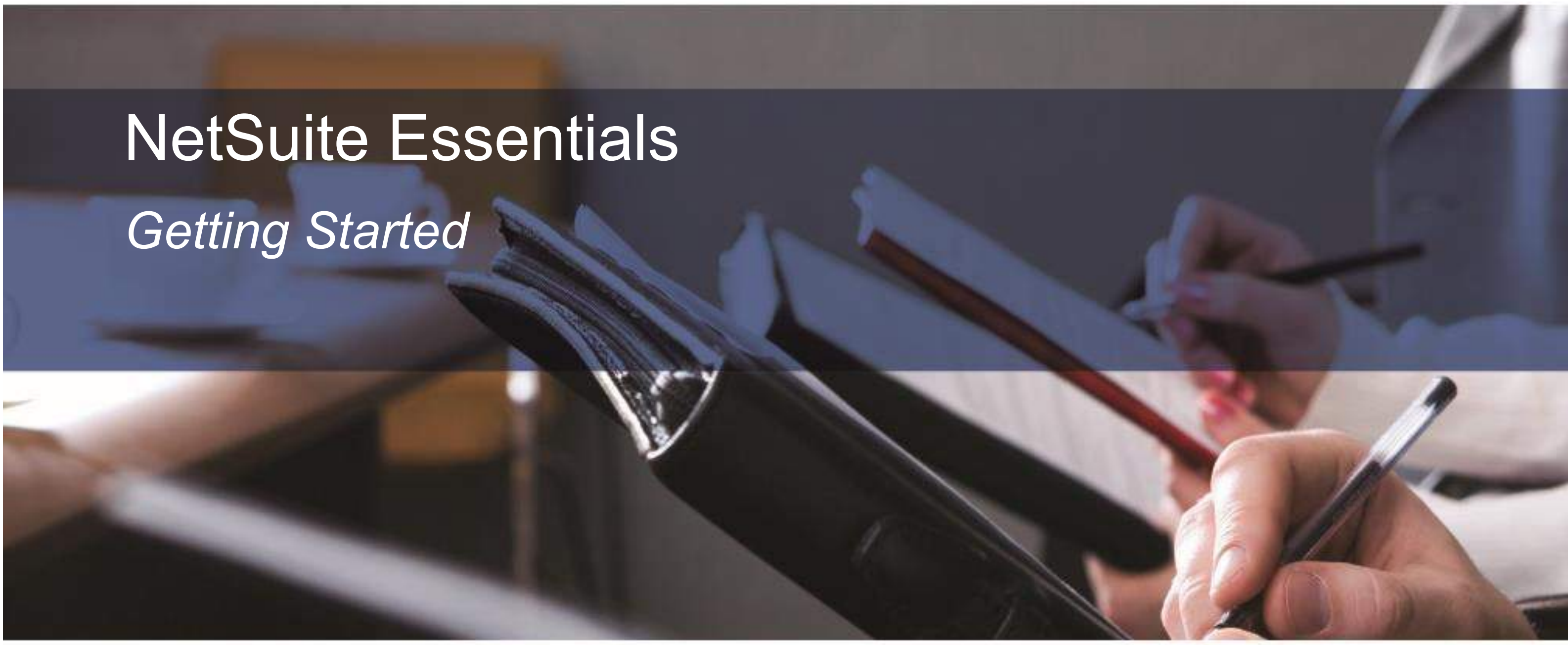
NETSUITE | SuiteTraining



NetSuite Essentials

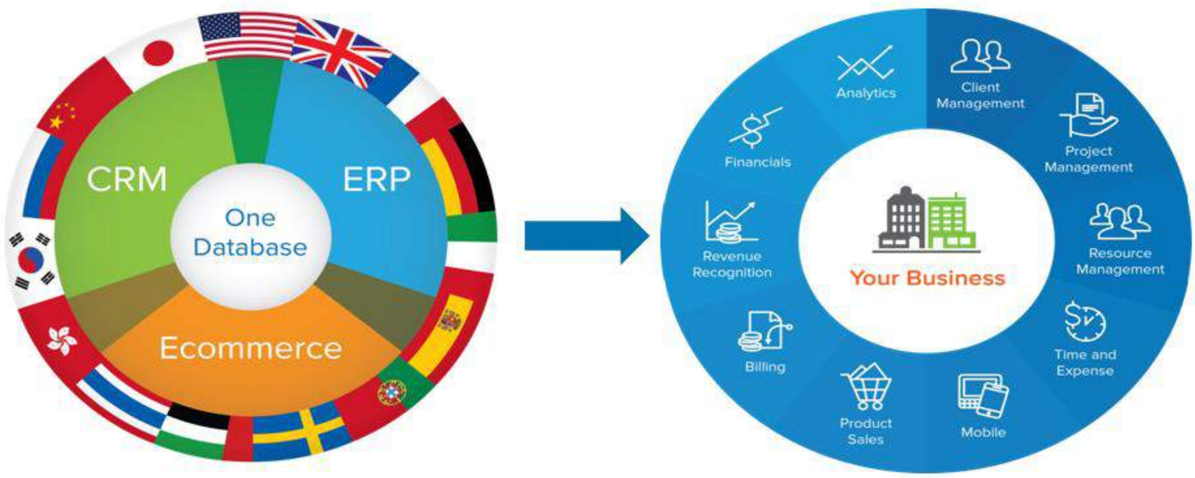
Getting Started

Table of Contents

NetSuite is an Integrated Business System

NetSuite enables running all facets of your business within one database:

- After you log in, and continue through tasks throughout the course, you will see the breadth of the application



Walkthrough: Initial Login and Training Account Review

Customer Login at www.netsuite.com

Setup > Company > View Billing Information > Add-On Modules

Use Case / Scenario: How to log into the training account for this class and look at the account profile

- Log into www.netsuite.com

The 30-day training account has the following attributes:

- OneWorld account that supports multiple subsidiaries or legal entities
- A profile that may be different from your production account
- Provides both ERP and CRM functionality

Class Login
In this class, you are being provided with specific log in credentials. Your login credentials will be valid for approximately 30 days.

Exercise 01: Log in to NetSuite

Time: 5 minutes

Scenario: Let's ensure that you have access to your training account and review the Add-On Modules:

- Login to the application
- Answer three security questions so you can verify your identity if you forget your NetSuite password
- Mark the **Administrator** as the **Default Role**

1 Open your browser and type www.netsuite.com in the address field.

2 Find the **Log In** link, top-right and click it.

   a. Enter the Email Address as provided by the instructor.

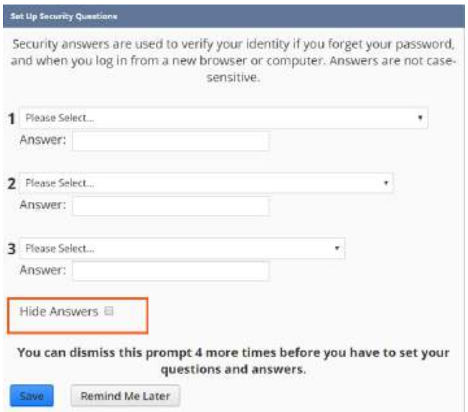
   b. Enter the Password as provided by the instructor.

      i. Please make note of this password, for use throughout the course. You can use the electronic sticky note in the PDF file.

      ii. **DO NOT CHANGE THE PASSWORD; continue using the password provided**.

   c. Select the **Remember my email address** check box and then click the **Login** button.

3 The **Set Up Security Questions** pop-up window displays:



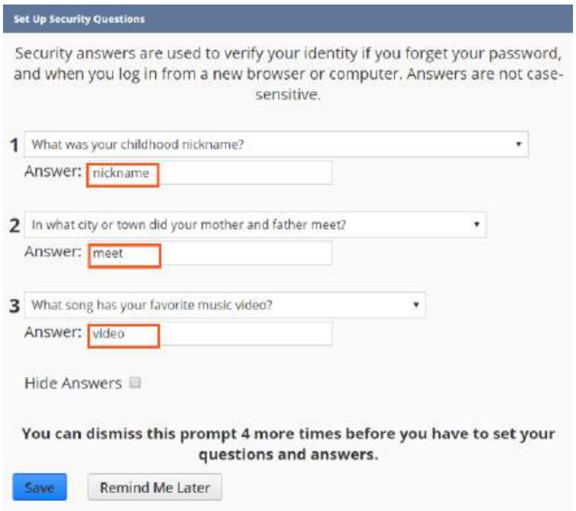
   a. Select **three security questions** of your choice

   b. Uncheck **Hide Answers**

   c. As your **Answer,** enter the last word of each question; for example:

      i. **Question:** What was your childhood **nickname**

ii. **Answer**: nickname



4 Click **Save** and click **Close** in the Security Questions Complete pop-up window.

5 Check any checkboxes, and click Continue, for any additional pages to get to the NetSuite Application.

6 You should be on the **NetSuite Essentials** page.

7 **Confirm your success with the instructor.**

8 **End.**

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How NetSuite Fits Your Business

About this Module

In this module, we consider information needed for the NetSuite implementation and introduce additional functionality:

How is NetSuite going to manage our business rules and processes?

Examine Data Organization and Structure

Review NetSuite's Environment

Objectives

1. Look at NetSuite as an integrated business system
2. Identify the benefits of the data base structure
3. Define how to work with forms
4. Consider the use of business rules and business processes

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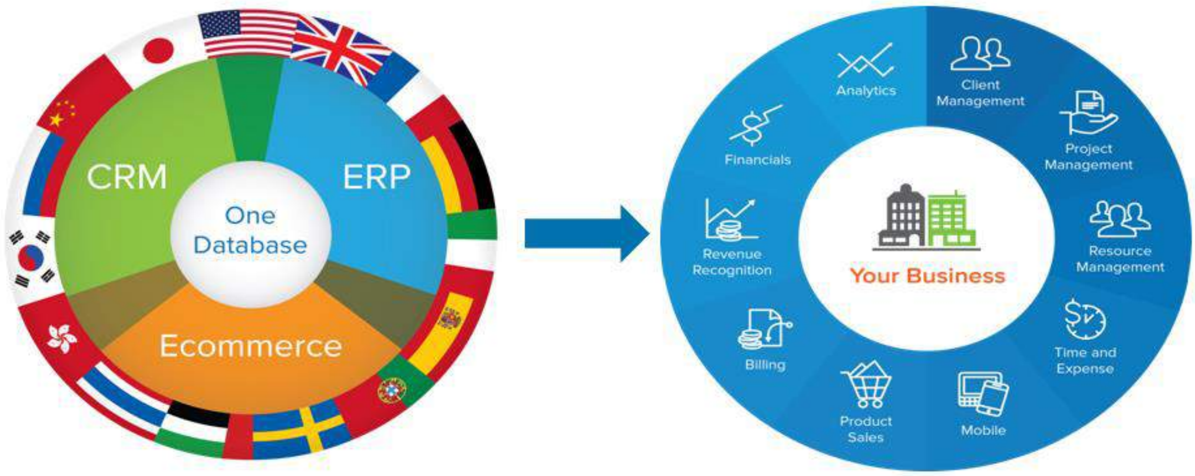
Integrated Business System

- Single source of data, connecting the businesses' functional units together, delivering a single point of business knowledge
- Complex database with customizable business process and internal control capabilities



Common Reasons for Choosing NetSuite

NetSuite is a Software as a Services (SaaS) Model:

- Application hosted over the internet (log in from anywhere)
- Configurable and customizable

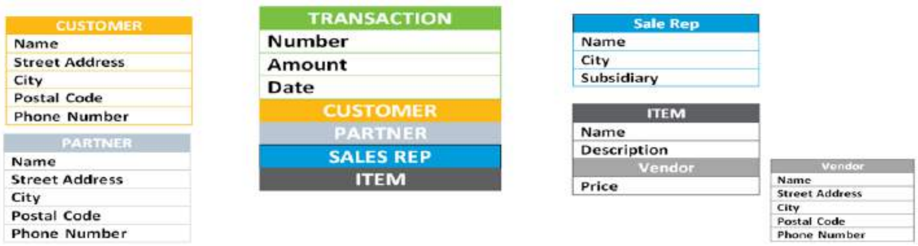
NetSuite uses a relational database management structure (RDMS)

- Uses data common to multiple tables to link them together
- Predominant choice in storing financial records, manufacturing and logistical information, personnel data

Relational Database in NetSuite

Benefits of a relational database:

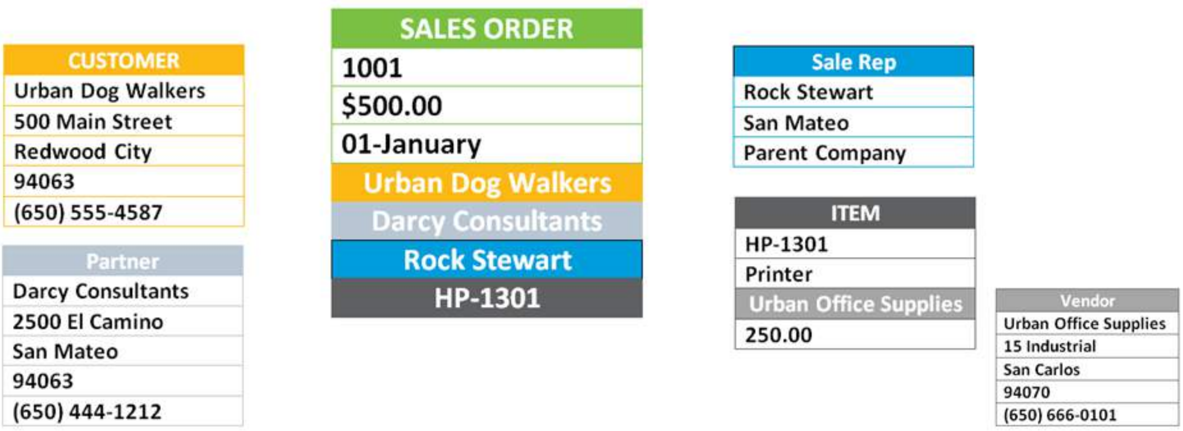
- Incorporates many unique tables
- Defines tables with rows or unique lines of information
- Relates tables together to form another table, for example a transaction
- Displaces 4 pieces of information for 1
- Provides a richer and more efficient use of data storage resources
- Results in a more functional and significantly richer dataset for information delivery



NetSuite Example

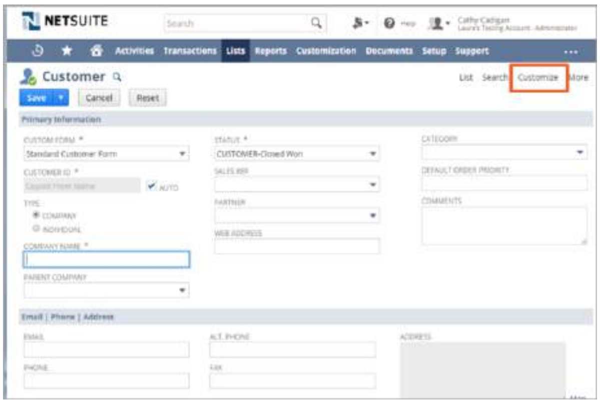
New Sales Order table (or record) pulls information upon data entry from:

- Customer, Partner, Sales Rep, and Item tables (records)
    - Item table pulls information from vendor table



Working with Forms

A form is the interface used to create, view and modify a record:



- Customizable to suit your business needs and processes
    - You can reorganize subtabs
    - Rename fields to better match your business processes
    - Control access to information in accordance with your business rules

Business Rules and Business Processes

Business Rules define or constrain aspects of the business systems

- Example: Before fulfilling an order, the Sales Manager must approve it
- Documenting business rules is essential for good system design

Business Processes define how a business organizes its activities to complete the work and is a collection of the business rules:

- Sales Rep enters an Order, then a sales manager approves the order, allowing the warehouse to then fulfill the order

Well architected business processes can:

- Provide internal control, ensure compliance and data integrity
- Without defined business rule constraints to manage users' interaction within the database, it is just a repository of information
- With constraints, well defined, the database can be used to administrate a process and to provide control

Activity: Match Game

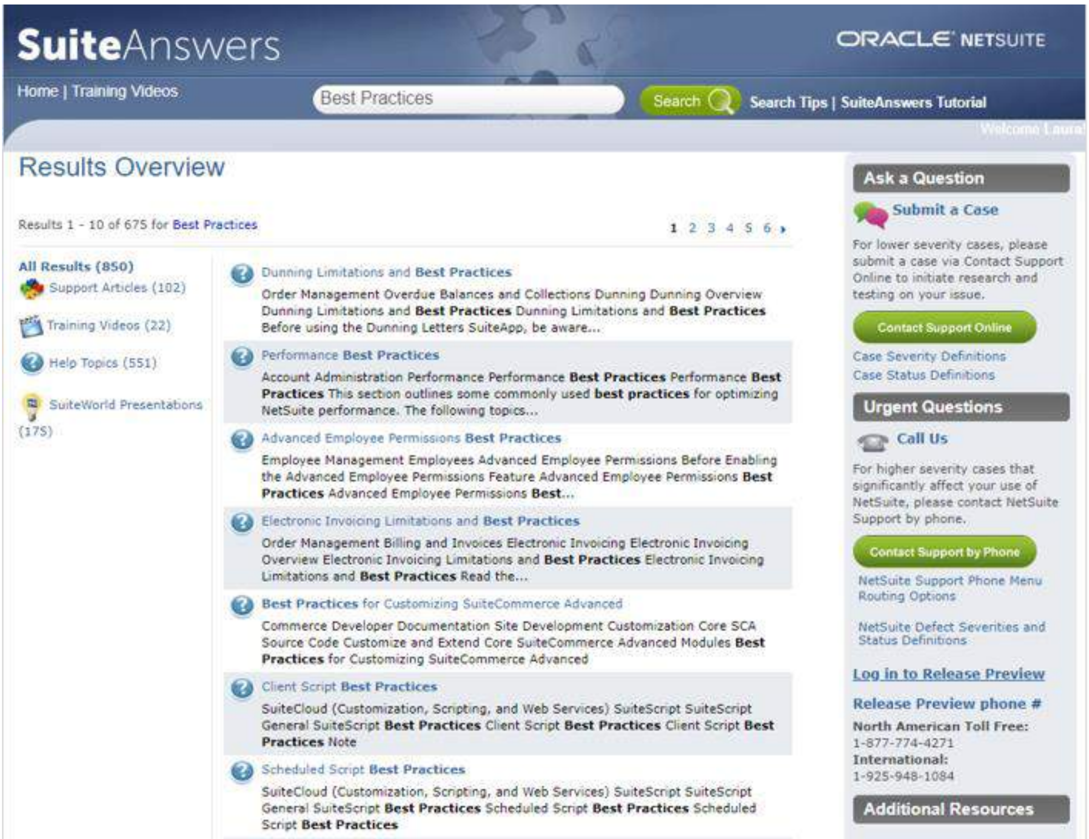
See if you can match the terms on the left, with the task/description on the right.

1. Database	A. Statement that defines or constrains some aspect of the business systems
2. Row	B. Defines how a business organizes its activities to complete the work, and is an extraction of the business rules
3. Business Rule	C. An organized collection of data
4. Business Process	D. Interface through which a record is viewed, modified or created
5. Form	E. Record. Each unique line of information within a table

Best Practices

Access a list of assets, developed by subject matter experts, in **SuiteAnswers**:

- Enter Best Practices in search field
- Review the resulting list, which includes:
  - Support Articles
  - Training Videos
  - Help Topics
  - SuiteWorld Presentations



NetSuite Navigation

About this Module

Learning navigation will facilitate your implementation project and is your first step on your path to using NetSuite's native features:

- NetSuite offers multiple, effective navigation paths
- NetSuite uses basic browser functionality

Objectives

1. Utilize NetSuite security measures
2. Recognize NetSuite Web page elements
3. Personalize your Home Dashboard
4. Learn NetSuite Terminology
5. Use Basic Search Options
6. Use multiple Help resources

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Walkthrough: Login and Security

Review Customer Login

Administrator Password Management

Use Case/Scenario: Introduce logging in and security measures that are applied

Review Customer Login

Click the Customer Login link, available from the Visitor Center website:

- In the Customer Login enter in the E-mail address and password

Caution: **User 30-minute lockout occurs after six (6) failed attempts**. After 30 minutes, has passed, Re-enter your email and password.

Administrator Password Management

Administrators responsible for defining password management:

- Administrator go to **Setup > Company > General Preferences**
- **Password Policy**: enforces specific requirements
  - **Strong**: minimum length of 10 characters, at least 3 of these four character types —uppercase letters, lowercase letters, numbers, non-alphanumeric characters – this is the default setting
  - **Medium**: minimum length of 8 characters, at least 2 of these four character types: uppercase letters, lowercase letters, numbers, non-alphanumeric characters
  - **Weak** (Not Recommended): minimum length of 6 characters
  - All three password policies continue to enforce validation against these basic criteria: significant difference from previous password, use of only legal characters.
- **Maximum Password Length**: dictated by the password policy defined
  - The default value for this field is determined by the selected password policy.
  - You can, if desired, make the minimum password length value longer than the minimum required by the policy. You cannot make this value shorter.
  - Passwords for new users logging in with the Customer Center role, and for web site shoppers, require a minimum of six (6) characters. Passwords for Customer Center users and web site shoppers who existed before that release were not affected by this change.
- **Password Expiration**: number of days a login password can be used before a user is prompted to change it
  - Days are calculated from the date that each user last changed their password, not from the date that the company preference is changed.
  - It is strongly recommended that administrators set this value to a minimum of 180 days.
    - The maximum number of days will take a very large number, which should accommodate most companies.
  - To comply with Payment Card Industry (PCI) standards, employees with access to view unencrypted credit card numbers are automatically required to reset passwords every 90 days, unless the limit set here is shorter.

Your NetSuite Account Security

NetSuite takes your account security seriously:

- Upon first login, users may be prompted to set up security questions
    - Select from a predefined list of questions and provide the answer
    - Security questions are required and help NetSuite protect your account
    - You will be asked to provide an answer to one of your questions upon switching browsers or computers

Security Question Confirmation and Reset
NetSuite provides a confirmation of your security questions being set:

- NetSuite sends a system-generated email to the user
- Users may reset their security questions in the Settings portlet
    - Go to **Home > Settings Portlet**

- Users are required to verify security questions upon changing browsers

Walkthrough: NetSuite Center and Web Page Elements

NetSuite Center

Dashboard

Portlets and Release Information

Change Password

Update Security Questions

Set Preferences

Use Case/Scenario: Look at the starting point for navigation by investigating a NetSuite Center and page elements

NetSuite Center

The center is a role-specific set of tabbed pages; providing the pages and links users need to perform their job.

- The administrator, by default, works in the Classic Center
- Each Center has a default Dashboard
    - *The New Release portlet is often provided and is your best resource for information regarding an upcoming release*

(Please note that with his release, the tabs across the top have been reordered; Customization has been moved to the right of Setup)

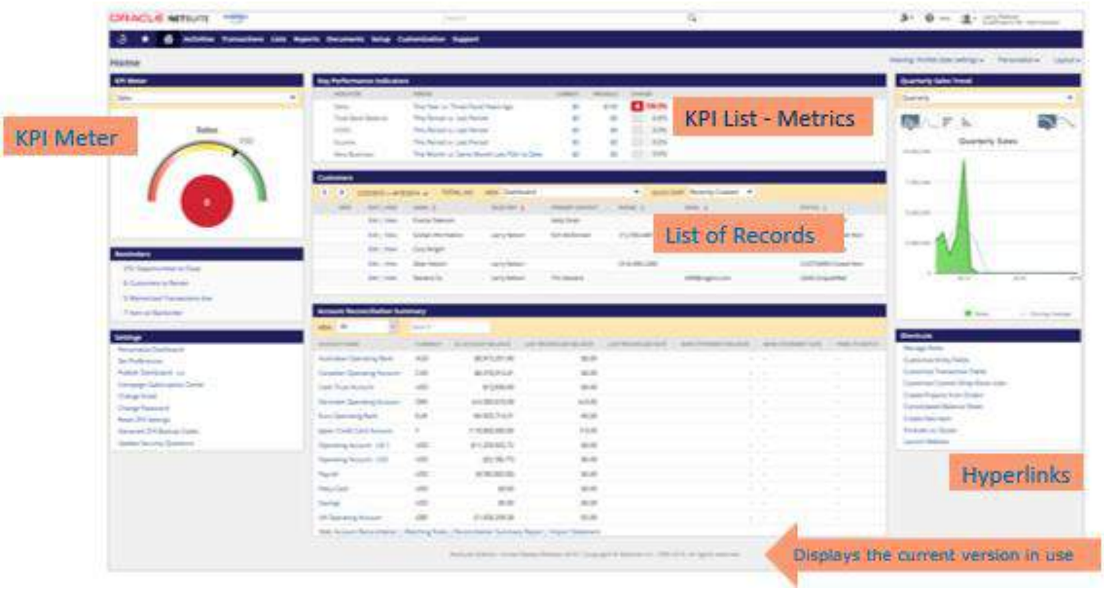
Dashboards

Each tabbed page has an overview or dashboard:

- Provides a visual workspace, which may be personalized
- Displays portlets containing relevant information to your job

Portlets and Release Information
Each tabbed page has a dashboard, a visual workspace, which may be personalized through publishing dashboards to groups of users or allowing individual users to personalize their own dashboard:

- Display Portlets containing relevant information to your job, which are dynamic-data display windows, for example:
    - Provides hyperlinks (Reminders) to other areas within NetSuite
    - Presents metrics (Key Performance Indicators) or a list of information
    - Displays a list of information (Customers)



- Review the Release Information at the bottom of the home dashboard

Change Password

At any time, users may choose to change their password:

- Go to **Home > Settings,** select **Change Password**
- Enter in Current Password and New Password to be evaluated by the Password Criteria
- The passwords are evaluated for strength based on the Password Policy as defined by the administrator

Pop Quiz! Can a password be set to expire after a year?

Update Security Questions

Update Security Questions – **Home > Settings** portlet, select **Update Security Questions**:

Security questions are available, which can be set at any time.

- Choose from pre-define lists of questions and then provide your answers
- These questions are used to validate user's authenticity; in case they forget their password.
- **Best Practice:** complete the security questions the very first time you are prompted by the system

Set Preferences

User-level preferences may be set by each user:

- **Home > Set Preferences**
- Define some preferences for each of your roles
- **Note:** Administrators can define company-wide preferences, such as formatting
- Review each subtab and subsequent sections to set your personal preferences:
  - **General**:
    - User profile
    - Localization
    - Formatting
  - **Appearance**:
    - Color Theme
    - Centers & Dashboards
    - Chart themes
  - **Analytics**:
    - Search
  - **Activities**:
    - Enable your NetSuite Calendar preferences

Note: Utilize the 'field level help definitions' to learn more about the settings. Click the field name link to view the definition.

Activity: Match Game

See if you can match the terms on the left, with the task/description on the right.

1. Center	A. Different "windows" on a dashboard, displaying dynamic data
2. Dashboard	B. User-level preferences allowing the user to set up NetSuite to their needs
3. Set Preferences	C. Role-specific collection of tabbed pages
4. Portlets	D. A visual workspace, with content relevant to a user's job

Walkthrough: Personalize the Home Dashboard

- Personalize the Create New Dropdown List
- Add Content
- Use "My Login Portlet"
- Define Dashboard Layout
- Manage Portlets

Use Case/Scenario: Optimize usage of the Home dashboard through some personalization and definition

Personalize Create New Dropdown List

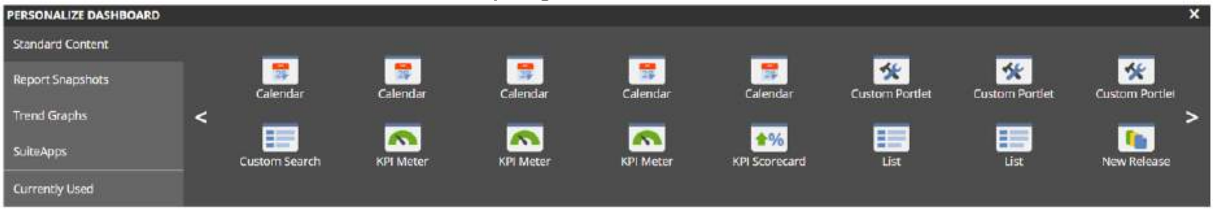
The Create New bar provides hyperlinks to pages in NetSuite:

- Available hyperlinks are determined by roles and permissions
- It is available for most records on most dashboards
- Click the down arrow to display the list
- Click **Personalize**
- **Add, move, remove** links
- Available hyperlinks are determined by roles and permissions
- Is available for most records on most dashboards
- Choose to **Include** or not the task in the 'Create New' toolbar
- Organize the list by **Move To Top, Move To Bottom,** or drag and drop
- **Save** your changes

Add Content to Dashboard

Personalize the dashboard to add portlets

- Click the **Personalize** link, top-right of the dashboard



- Add **Standard Content, Report Snapshots, Trend Graphs**
- Add **SuiteApps**, if already installed in your account, to add additional automation of functionality. *Please refer to help for more information.*
- Consider portlets that support managing the user's workload and decision making
    - **Key Performance Indicators (KPIs):** Display personal or company's performance in sales, support or other key areas of your business. You can highlight or compare them based on a selected date/period range.
    - **KPI Meters:** View the KPIs graphically. You may have up to three KPI meters on your dashboard. These can be easily swapped between the KPIs you have set.
    - **KPI Scorecards:** Display a portlet based on the results of a KPI. This portlet is not available unless the KPI Scorecards feature has been enabled, in the account. Also, check with your account administrator to ensure you have the KPI Scorecards permission.
    - **My Login Audit:** Display on your dashboard to track your last successful login, your last failed login, the IP address associated with your login activity, the date when your password will expire, and other login information.
    - **RSS/Atom Portlet:** Displays news feeds from popular web sites which support RSS format. You can use any RSS feed available; in the setup link, select Custom and paste in the URL.
    - **Report Snapshots** and **Trend Graphs:** Quick looks at business results each time you view your dashboard
- Review **Currently Used** portlets
- **Close** when done
- The NetSuite Help Center has a related topic: **Dashboard Portlet Types**

My Login Portlet

Helps ensure the security of your NetSuite account; audit your own login activity

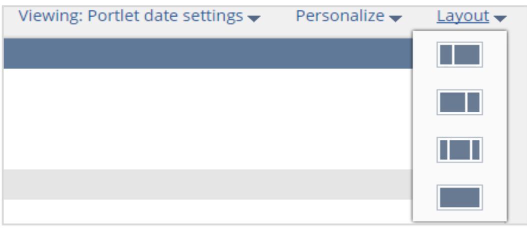
- Track your last successful login and failed login
- Monitor the IP address associated with your login activity
- View the Password expiration date; the administrator defines a setting which impacts the expiration date
    - Listed dates and times are driven by user-level preferences and the time zone selected, as part of localization

My login audit	
Previous Login	8/19/2014 2:18 pm
Previous Mobile Login	-
Successful Logins Today	4
Login Failures Today	1
Previous Password Change	7/18/2014 3:08 pm
Password Expiration	10/16/2014 3:08 pm

Define Dashboard Layout

Go to the Layout link, top-right of the dashboard and select your desired layout:

- 2 columns: Narrow, wide
- 2 columns: Wide, narrow
- 3 columns, Narrow, wide, narrow



Selecting a two-column layout setting is probably the most optimal for viewing NetSuite on a tablet or phone

Manage Portlets

Portlets may be configured to better suit the user's needs:

- Hover over a portlet's title bar to access the **Set Up**

- Click **Set Up** and define the portlet's display
- Portlets may be moved to new locations on the dashboard using drag and drop:
  - Click the portlet title bar, hold the mouse down to move the portlet
  - Release the mouse to drop into the new location

Introduction: NetSuite Terminology

Lists and Transactions

Forms and Records

Lists and Transactions - Classic Interface (Center)

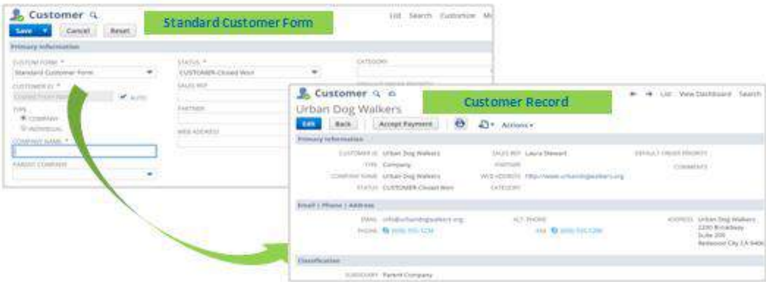
Administrators access NetSuite in the Classic Interface (Center), with menu paths for Transactions and Lists:

- Transactions involve movement of money or value, for example:
  - **Transactions > Bank**
    - **> Write Checks**
    - **> Make Deposit**
    - **> Transfer Funds**
- Lists include people, places and things for example:
  - **Lists > Relationships**
    - **> Customer**
    - **> Vendors**
  - **Lists > Accounting**
    - **> Items**

Forms and Records

Forms:
- Enter, view, and modify data in NetSuite. For example:

Records:
- Store the data as a specific record type; for example:
  - Customer
  - Item
  - Account
  - Subsidiary



Customization, to be introduced later in the course, allows you to work with forms and records:

- Forms may be customized to meet your business requirements
- Custom records may be created to meet your business needs

Walkthrough: Basic Search Options

Global Search

Quick Search Portlet

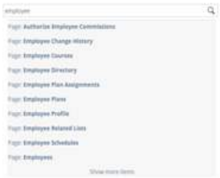
Use Case/Scenario: Introduce different ways to search for information/records in the NetSuite Account

Global Search

Global search is a common way to quickly search for records by entering in criteria:

- Displays at the top-center of your NetSuite page
- Use up to three key words per search
- Autosuggest can drive results
- Use letters, numbers, dashes, and the "OR" separator
- Leverage wild cards: "%" or "_"
- Use prefixes such as "cus:" to restrict results to customer records
- Use the "Page" prefix to find a report
- Click the **Name** to view the record or click **Edit** to edit the record

Enter criteria and click **Go;** auto suggestion can drive the results:



- Click **Edit** to open the record in edit mode
- Click on the **name** to open the record in view mode

Tip: You can right-click on the mouse, to edit or open the record, to either open in a new tab or a new window

Quick Search Portlet

The Quick Search portlet may be added to the dashboard (personalize):

- Click the **Set Up** link
- Define the behavior, for example:
  - **Search Type** can be either General or Transaction
  - **Save**
- In the portlet, now enter your criteria and **Search**

Walkthrough: Using Help Resources

- NetSuite Help Center
- NetSuite Glossary
- Field Help
- Page Help
- SuiteAnswers
- SuiteSupport

Use Case/Scenario: As a new user, it is important to know where and how to find online resources

NetSuite Help Center

The **NetSuite Help Center** is a complete repository of online help resources:

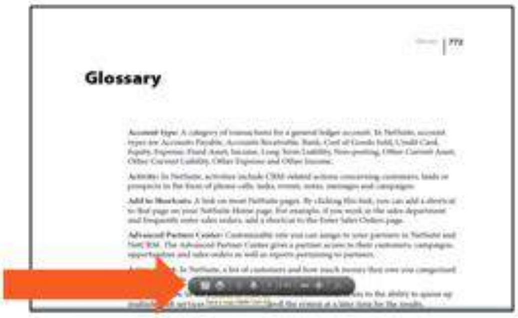
- Access the Help Center, clicking on **Help** at the top-right of your NetSuite page:
- Access complete repository of online help resources
  - Help Topics, User Guides, training materials, links to other resources
  - Search the Help Center
- Type in help: followed by keyword(s) and click Go to **the Global Search** field

Tip: Use Global Search to go to a list of topics by typing in Help: followed by a word or phrase. For example, *help: invoice*

The **NetSuite Help Center** opens in a new window:

- Navigate through the **Table of Contents**
- Navigate to **SuiteTraining** to view course offerings
- View **User Guides** in PDF
- Use the **Help Center Search** to look for a specific topic
- Utilize other hyperlinks for SuiteAnswers, What's New, FAQs, etcetera

NetSuite Glossary



NetSuite **Glossary:** Search the NetSuite Help Center for the glossary

- Type “Glossary” into search box
- View the list of available PDFs in translated versions
- Select the version choice to view the PDF and then save a copy to your desktop

Field Help

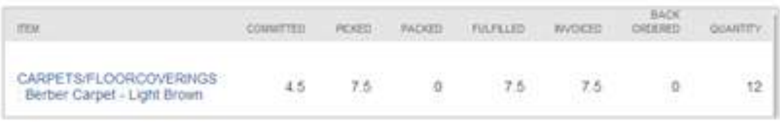
Field Help provides users with field-specific information:

- Available on most field in view, edit or add mode
    - Note: If you add a custom field, then you write the field help
- Hover over the field name and click on What’s This?

    - Example: Company Name
- A pop-up window opens and displays the Field Help, which provides details about the selected field
    - Example: Company name is the legal name of the customer

Other fields, such as column field, do not have Field Help

- For example, columns on line items such as Quantity

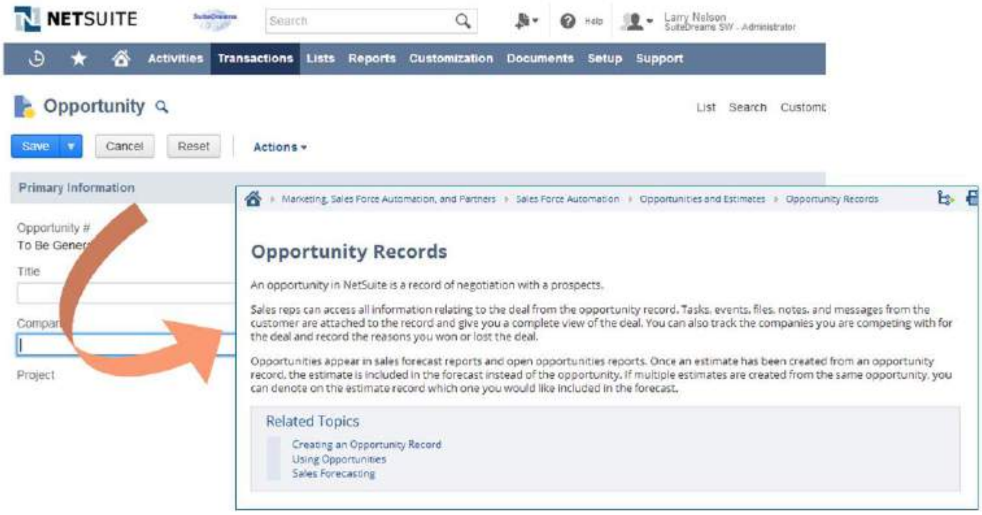


ITEM	COMMITTED	PICKED	PACKED	FULFILLED	INVOICED	BACK ORDERED	QUANTITY
CARPETS/FLOORCOVERINGS Berber Carpet - Light Brown	4.5	7.5	0	7.5	7.5	0	12

Page Help:

NetSuite “knows” where you are in the system

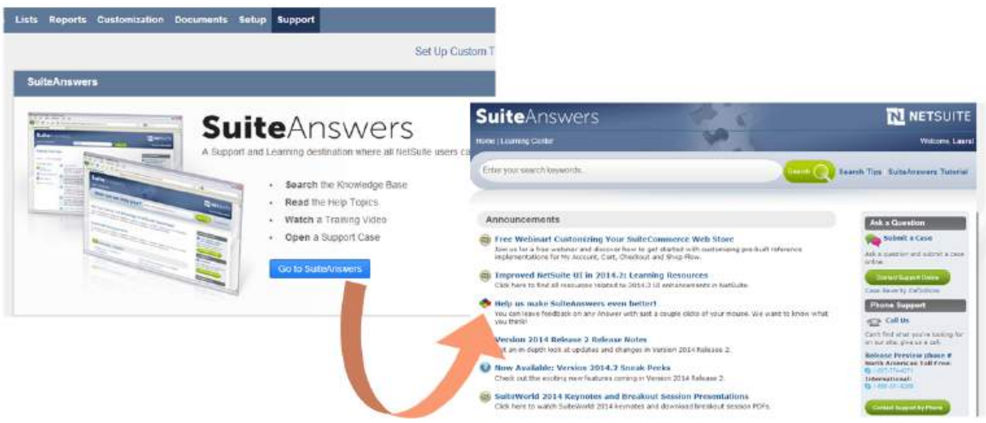
- Click the help link at the top, right-hand side of the page
- View information relevant to the page you are viewing



SuiteAnswers

An online repository - a wealth of knowledge:

- Access from the **Support** tab, inside your NetSuite Account, and click on **Visit the SuiteAnswers Site**
- In SuiteAnswers, click on the **Learning Center** tab



SuiteSupport

You have the various support options; complemented by an extensive library of detailed online help and other resources such as:

- FAQs, online user guides, sneak peeks at upcoming releases, and tips that will help you get the most from **your NetSuite application**
- View more information at: [SuiteSupport]() or http://www.netsuite.com/portal/services/support.shtml

	Silver	Gold	Platinum
Coverage Hours	M-F 8AM-6PM (Customer local time)	Toll-free 24x7 (Severity 1 & 2) M-F 8AM-6PM Customer local time (Severity 3 & 4)	24X7 Case Submission (All severity levels) M-F 8AM-6PM Customer local time (All other services)
Access to SuiteAnswers Technical Support Portal	Standard	Standard	Standard
Online Case Submission	☑	☑	☑
Telephone Case Submission		☑	☑
Authorized Support Contacts in Your Organization	2	4	6
Dedicated Platinum Team			☑
Support Account Manager			☑

Activity: Match Game

See if you can match the terms on the left, with the task/description on the right.

1. Transactions and Lists	A. The way data is stored in NetSuite
2. NetSuite Help Center	B. Menu paths available in the Classic Interface – Our verbs and nouns
3. Global Search	C. Pop-up window displaying relevant information for a field
4. Field Help	D. Used to enter a new record or view an existing record
5. Record	E. A common way to search for records
6. Form	F. Online Help, Guides, Tips, and More

Walkthrough: Browser Functionality and NetSuite

Use Case/Scenario: Learn tips for using NetSuite in the browser and assessing its performance

Open New NetSuite Tabs or Windows

NetSuite utilizes standard browser function to view links in a new tab or a new window:

- Hover a link and right or left mouse click
- Select **Open in New Tab**
- Select **Open in New Window**

CAUTION If response time degrades or you get "An Unexpected Error Has Occurred" message, then close down extra tabs and windows.

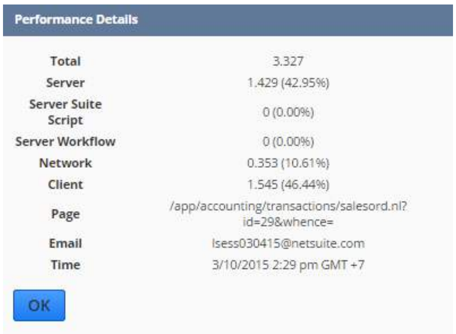
Review Recent Records

Access recent records from the  icon, located to the left of the home icon, rather than the back arrow in the browser:

- Select to view or edit the record
- Select **All Recent Records** to display a date-driven list
- **Note: Avoid using the browser Back Button to retrace your steps**.
    - Data entered may be lost if you navigate with this back button
    - Also, pages presented may not be refreshed

Investigate Processing Time

Double click the NetSuite logo, top-left of the page, to view processing time:



- **Server =** How long it took NS to find the data
- **Server SuiteScript, Server Workflow** = If you are using these for automation, it shows stats. Please refer to help for more information on SuiteScript and WorkFlow.
- **Network** = How long it took to transmit the data from NS to you
- C**lient** = How long it took your machine to display the information
- Identifies the **Page**, your **Email** for login, and **Date**

If you are experiencing a slowdown:

- Navigate to a different website to gauge load speed
  - If the other site loads quickly, then the problem is between your ISP and the NetSuite servers
- Clear browsing history or cache
- If necessary, close NetSuite and reopen

Now It's Your Turn

Use Case/Scenario:

- Start setting up your view of NetSuite
- Investigate search and help
- Allow 10 – 15 minutes

Exercise 01: Set Your Preferences

Time: 2-5 minutes

Scenario: How do you want your NetSuite pages to look and how do you want to interact with areas of the account?

Use these exercises to:

- Set your preferences for the application “look and feel” and for viewing information.
- Set preferences for the Searches and the Calendar

Note: The **Home** dashboard is represented by the icon []. All menu paths will reference

Set Preferences

1. In the **Administrator role,** navigate to **Home > Set Preferences**. The **General** subtab displays automatically.
2. In the **User Profile** section, review the available fields
    a. In the **Signature** text box. If you like you may enter your name, a Department Name, Company Name and address.
3. Click the box to **Add Signature to Messages** from NetSuite.
4. In the **Localization** section, select your Local **Time Zone**. Also, review the following and change if necessary:
    a. **Search Sorting** set to English (U.S.) or your preferred language.
    b. **Time Zone** set to your preferred time zone.
5. In the **Formatting** section, select your preferred formats for **Time**,
    a. Review the available fields.
    b. Administrator can set company-wide preferences, for data entry consistency; any company-wide preference, the corresponding field would be grayed out.
6. Click the **Appearance** subtab:
    a. Select the **Color Theme** you want for the Administrator role; color themes can be set differently for each of your roles.
7. Click the **Analytics** subtab, in the **Search** section check mark the following boxes, if not already checked:
    a. Show List When Only One Result

b. Quick Search Uses Keywords

c. Popup Auto Suggest

d. Global Search Auto Suggest

e. Under Export – change the export option to your home operating system: UTF-8 (if it is already set to UTF leave it alone).

8 Click the **Activities** subtab and select how you want calendar, task and phone call information to display. **Check mark the following boxes**:

a. Edit Activities from Calendar

b. For Send Invitation Emails, click **To all Invitees** button.

c. **Default Event Access Setting for New Events** Public

d. Check **Default New Tasks Public**

e. Check **Default New Phone Calls Public**

9 Click **Save** when you are done with setting your preferences.

10 **End.**

Exercise 02: Set Up Your Dashboard

Time: 2-5 minutes

Scenario: Consider how you would like your workspace to look. Your account may have some dashboards preconfigured, but you might still want to further personalize.

In this exercise, you:

- Define Dashboard Layout
- Choose the portlets you want to display
- Define portlet display placement

Define Dashboard Layout for the Administrator Role

1. Click the **Layout** link, located in the upper-right corner of the Home page.
2. Using the images, click on one of the following:
   a. 2 columns: narrow, wide
   b. 2 columns: wide, narrow
   c. 3 columns: narrow, wide, narrow

Add portlets to the Home Dashboard

3. Click the **Personalize** link, located in the upper-right corner of the Home page. The **Personalize Dashboard** pane opens at the top of the page.
4. Click on **Currently Used** and review which portlets are on the dashboard; the following portlets may be included:
   a. **Account Reconciliation Summary:** Lists your bank and credit card accounts and displays the key data for matching and reconciliation activities.
   b. **Key Performance Indicators**: Shows key business metrics. These metrics are summary data from reports or saved searches for selected date ranges, with options to show comparisons between date ranges and to highlight results not meeting defined thresholds.
   c. **New Release**: Shows a summary of new features from the latest release of NetSuite, with links to more detailed descriptions.
   d. **Quick Search**: Shows a form where you can quickly search for records of a selected type, using one selected filter field and entered keywords.
   e. **Settings**: Shows links to user-level setup tasks.
   f. **Shortcuts:** Shows links to selected pages, so you can navigate quickly to frequently used pages.

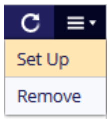
g. Please refer to the **Help Topic: Portlet Types Table** for more information.

5 **Add Content:** We can use drag and drop functionality to add content to the Home dashboard. if necessary, add the following portlets: **Calendar**, **Custom Search, List, My Login Audi Portlet, Quick Search, Reminders, Tasks,** and **Shortcuts**. You may also add the **Quick Add** portlet; sales reps like this portlet. Click on **Currently Used** again; review the portlets that are now on the dashboard

6 Click on **SuiteApps** and note that we do not have anything available. Please refer to Help for more information regarding SuiteApps

7 Close the **Personalize Dashboard** pane by clicking the **X** in the top-right corner.

Organize the Home Dashboard portlets



8 Hover title bar of **Calendar: My Calendar** portlet and click on **Set Up**.

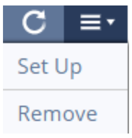
a. Review the available display options and then click **Cancel.**

9 In the **Calendar** portlet, find the dropdown list and **change Day** (or other time reference) **to Agenda.** This can help you manage your time and activities

10 ***Note:*** If visible, hide the **New Release** portlet that NetSuite pushes out to users. Hover over the top right-hand side of the title bar and click **Remove**. This portlet is pushed out by NetSuite when a New Release is coming

11 Drag and drop the **My Login Audit** portlet to a narrow column, if it has defaulted to a wide column.

12 Hover over the title bar of the **Reminders** portlet and click **Set Up**.



13 Ensure that the **Event Invitations to respond to** reminder is displayed in the list and move it to the top.

a. **Click or Drag to Add** a reminder to the list.

Exercise 03: Use Global Search

Time: 2-5 minutes

Scenario: Global Search is the best way to search for information in the application.

In this exercise:

- Practice using (Global) Search.

1. Enter **employee** in the **Global Search** field. NetSuite will either start displaying possible results or click **Enter** on your keyboard to see all results.
2. What types of records are returned? Why do you think these records returned?
3. Click **Home**.
4. **End.**

Exercise 04: Use NetSuite Help

Time: 2-5 minutes

Scenario: NetSuite Help topics are a great resource to assist you with learning how to use the NetSuite application.

In this exercise:

- Conduct research within the NetSuite Help center.

1 Start on the **Home Dashboard**

2 Click the **Help link** in the top-right corner of the page.

   a. What displays in the main Help page?

   b. Answer: Since you are on the Home Dashboard, Help displays the basic Welcome page.

3 Enter **CRM** in the Help Center Search field, click Enter on your keyboard, and then scroll through the list and click the link for **Creating CRM Task Records**.

   a. Find the first topic discussed in this section and review.

      i. Scroll through help topic and look at the list of Related Topics

4 Click **User Guides** in the **Help task bar**.

   a. What file formats are these documents?

5 Scroll down to the **Sales, Marketing, and General CRM Guides.** Click the **Sales Automation Guide**.

   a. The guide displays

   b. Review the Table of Contents

   c. If you like, download a copy to your desktop.

6 Go back to **Home – NetSuite** browser tab.

7 Go to the **Create New** dropdown , click **Personalize**

   a. **Select** Task

   b. **Move** to the top

   c. **Save**

8 Go to the **Create New** dropdown , click **Task** to create a new task record.

   a. Click on the word **Assigned To*.**

b. Review the field help

c. Close the Field Help pop-up.

d. Now click on **Priority*** field and review the field help; close the pop-up window when done.

e. Click **Cancel.**

9 Go to the **Global search** field and type in **Help: Sneak Peeks** and click search icon

a. The Help Center opens

b. Find and click on the link **"Finding Out What's New in NetSuite"** in the list of results.

c. Review the information about **Sneak Peeks**.

10 Close all open **Help** browser tabs.

11 **End**.

Solution for Exercise 03: Use Global Search

Use (Global) Search (Search by Key Word)

Enter employee in the Global Search field and click Go.

What types of records are returned? Why are these records returned?

- **Answer:** The results show no employee records; all records are pages with the word employee in them.

Solution for 04: Use NetSuite Help

Click the Help link in the top-right corner of the page.

What displays in the main Help panel? Why does this content display?

- **Answer:** Welcome to NetSuite Help Center.
- **Answer:** When on the Home page, and we click Help, it takes us to a page introducing the Help Center

Enter CRM in the Search field and click Enter on your keyboard. Scroll down the page and click the link for Working with CRM Tasks

What is the first topic discussed in this section?

- **Answer:** Working with CRM Tasks providing an overview.

Click the User Guides button in the Help task bar.

What happens? And what file formats are these documents?

- **Answer:** A list of all the User Guides display in PDF format.

Click the Sales Automation Guide. What displays?

- **Answer:** The Sales Force Automation Guide.

Go back to Home – NetSuite (Essentials) browser tab.

In the Create New dropdown, click New Task to create a new task record. Click on the word Title*.

What does the field level help text tell you about the Title field?

- **Answer:** This name is the subject line of the email sent to the assignee if you check the Send email box.

This title also displays to others if the Private Task box is not checked. The title shows on the Tasks list.

What does the field level help tell you about the Start Date* field?

- **Answer:** This is the date the task should be started. If you are entering or editing the task, type or pick the start date of the task. This date is included in the email to the assignee.

Activity: Match Game

See if you can match the terms on the left, with the task/description on the right.

Additional Resources

NetSuite Help Center:

- NetSuite Basics

SuiteCloud Infrastructure Web Page:

- http://www.netsuite.com/portal/platform/infrastructure/main.shtml
- Read more about NetSuite's enterprise-class treatment of:
    - Application Security
    - Data Management
    - Operational Security
    - Availability

SuiteAnswers Learning Center:

- New Feature Training
- Getting Started

Set Up Company Preferences

About this Module

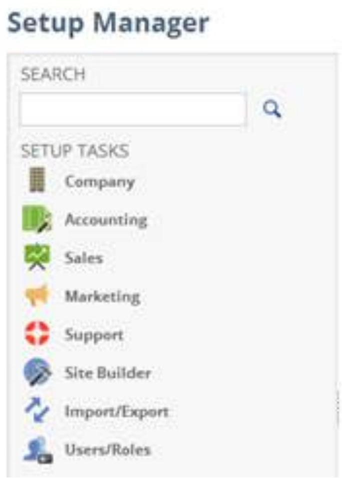
NetSuite is the single source for your data and can be tailored or configured to meet your business needs:

- Features are enabled and preferences defined to satisfy your company's requirements
- The Administrator is often responsible for the configuration
- At the beginning of the implementation project, it is okay to not know all your company's preferences

Objectives

1. Navigate the NetSuite Setup Manager
2. Complete setup tasks
3. Define preferences
4. Identify classifications

Introducing the Setup Manager



The Setup Manager links to setup pages to configure NetSuite:

- Go to **Setup > Setup Manager**
- Provides logical navigation for configuration of the account
- Presents Overviews for Company, CRM, ERP and Web Site Setup

Walkthrough: Initial Set up Tasks

Define Company Information

Enable Features

Use Case/Scenario: The administrator begins tailoring NetSuite to the company's requirements.

Define Company Information

Go to **Setup > Company > Company Information**
At the top of the page you may enter your company information, such as:

- **Company Name**: Can be printed on forms
- **Company Logo**: Can be set for web pages and printed forms
- Display Logo Internally: Check to display your company logo
- **Return Email Address**: used when emailing forms and reports from NetSuite.
- Define your company's **Currency Locale** and review the subsequent **Format Sample**
- Setting your **First Fiscal Month**
- Identifying your corporate **Time Zone**
    - The corporate headquarters' time zone, may differ from each user's time zone
- You may click the **Edit** link to enter in an **Address**, you may enter in your corporate address:

Scroll down on the page to enter:

- Address (to display on all forms, except checks)
- Return Address for receiving returned orders
- Shipping Address for shipments

Enable Features

Go to **Setup > Company > Enable Features** and Elect to turn on or off NetSuite features and functionality:

- Available features are determined by your subscription
- SuiteApps and Beta Features may be accessed through various subtabs
- Functional groupings on the following subtabs

Company	Employees
Accounting	CRM
Tax	Analytics
Transactions	Web Presence
Items & Inventory	SuiteCloud

Note: Record the Reason for Deleting a Transaction is available on the Company subtab, ERP section – select the **Use Deletion Reason** feature:

- In some countries, providing the reason why a transaction was deleted is a legal requirement.
- The Use Deletion Reason feature satisfies this requirement by making it mandatory for users to record the reason for deleting a transaction.
- All transactions listed at Setup > Company > Auto-Generated Numbers on the Transactions subtab are impacted by the Use Deletion Reason feature. When this feature is enabled, users must provide a reason for deleting a transaction record. The Transaction Numbering Audit Log provides a list of the deleted transactions, their transaction number, and the date on which the transaction was deleted and by whom. It also provides

Tips: Enable Features

Standard NetSuite Account:

- You do not need to enable/disable features all at once
- Return to Enable Features as needed
- Once enabled some features cannot be disabled
- Multi-Location Inventory cannot be disabled
  - **Important**: <u>Do not enable the Multiple Locations Inventory until after you have loaded all your inventory items.</u> If you enable Multiple Locations Inventory before loading inventory items, then you must map to the locations, making it more difficult for data migration.
- Multi-Language: for use by your users and customers viewing your Website
- Multiple Currencies cannot be disabled
  - Choose to have NetSuite run updates at 12:30 PST or by your set base time zone. Then those will run at 6AM for the local time you select.

OneWorld – Additional Considerations

- Multi Subsidiary Customer may be enabled to allow creation of customer records across subsidiaries. But, please refer to the Help Topic: Multi-Subsidiary Customer Feature Limitations
- The Advanced taxes feature is enabled by default
    - Allows you to use tax schedules to track taxes for each nexus in which your company is required to pay taxes
- Accounting periods enabled by default
    - Use this feature to segment your fiscal year
- Currency Exchange Rate Integration is useful:
    - The list of currency exchange rates can be automatically updated using the Currency Exchange Rate Integration feature. This will be reviewed later in the course, but we offer both Xignite and Thomson Reuters.
    - Not all companies will use this feature or you may prefer to manually set the exchange rates.
    - If you are NOT using multiple currencies the "currency exchange rate integration" runs at 12:30PST.

Implementation Considerations

Standard NetSuite Account may have some of the following considerations**:**

- What is the Currency Locale and Format (base currency) of your company?
- How do you plan to update and maintain currency exchange rates?
- How do you want to track and number your transactions?

***OneWorld* NetSuite Account** may have additional considerations**:**

- How many separate legal entities need to be consolidated?
- What are the base currencies of each of your subsidiaries?
- How do you plan to update and maintain consolidated exchange rates?

Walkthrough: Additional Set up Tasks

Rename Records / Transactions

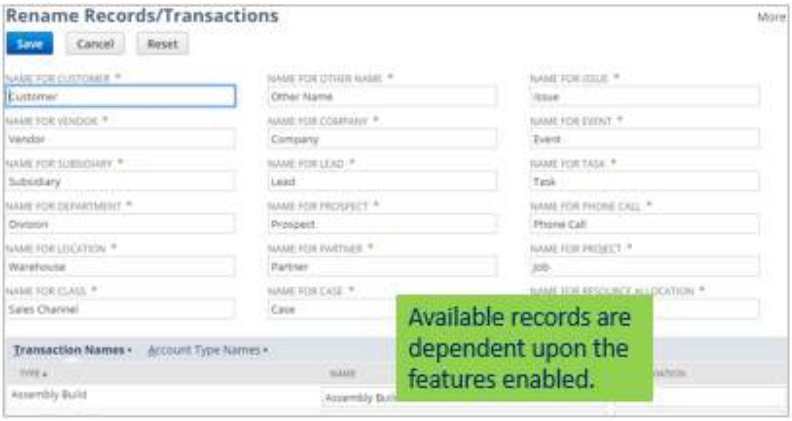
Define Auto-Generated Numbers

Review Transaction Numbering Audit Log

Consider Administrative Notifications

Use Case/Scenario: The administrator continues with tasks that are specific to their company's requirements.

Rename Records/Transactions



Go to **Setup > Company > Rename Records/Transactions**

- At the top of the page you can change the default record names, in NetSuite, to familiar terminology:
- On the **Transaction Name** subtab, you may rename the various transactions
- On the **Account Type Names** subtab, you may rename the account and reorder how they display in a list of values for example **move** Expense to the top of the Account Type Names list
  - **Use Case:** When setting up a new account for the GL, the Type field will display Expense as the first value in the dropdown list of available values

Best Practices: Renaming

Records:

- Enter new names as singular
- Do not rename a record the same as an existing record
  - (e.g. do not rename Customers as Partners)
- Do not use the same word to rename more than one record
  - (e.g. do not rename Vendors and Employees both as Resources)
- You can reorder the listing of accounts

Transactions:

- Do not change the abbreviations
- These abbreviations are referenced in NetSuite source material and renaming them can cause confusion
- Help Text is also referenced by the NetSuite name

Auto-Generated Numbers

Go to **Setup > Company > Auto-Generated Numbers**
Define the numbering schemes for your different records:

- Use numbers, rather than names for Entity and CRM records
- Use prefixes and suffixes with records, and define a numbering scheme
- Determine if you want to Allow Override or Update

Tips: Auto-Generated Number

Standard NetSuite Account may have some of the following considerations:

- Transactions are automatically assigned numbers, but you can define a numbering scheme
- Use prefixes for entities
  - For example, C for customer and V for vendor
- Use auto-generated numbers, with Entity names, so that the Entity name is a combination of ID and name

OneWorld NetSuite Account may have additional considerations:

- Specify subsidiary prefix on subsidiary records
- Enable auto-generated numbers
- Check Use Subsidiary box for subsidiary specific sequences to be used
- Must have transaction prefix on subsidiary to generate numbering scheme (Example: USA or AUS 01)

Transaction Numbering Audit Log

Go to **Transactions > Management > Transaction Numbering Audit Log**

- Provides a complete list of every transaction number, including numbers assigned to deleted or failed transactions
- Example: Cash sale failure due to credit card processing problem
- Requires the **List** type permission – **Access to transaction numbering log**
- Includes transaction type, number, date and time of the transaction number assignment, creator of the transaction
- Additionally, subsidiary and location may also be available
- If a transaction is deleted, then the report shows the date and time stamp and the user who deleted the transaction
- If a transaction failed to be created, a reason displays in the message column

Configure Administrative Notifications

Go to **Setup > Company \> Administrative Notifications**

- Provides the ability to define separate configuration settings for each of the following notification types:
    - **Administrative Notifications**: feature availability in your account and login failures
    - **Billing and Renewal Notices**: payment requirements when you purchase new features and notify you when it is time to renew your contract with NetSuite.
    - **Legal Notifications**: changes that require administrator acceptance, such as a modification to the Terms of Service (TOS).
    - **Scheduled Maintenance**: date and time for scheduled maintenance
    - **Service Release Notifications**: information about access to the Release Preview environment, and the time-frame when your account will be upgraded.
- Requires Setup Company permissions

You can define configuration settings separately for each of the notification types listed:

- **Administrative Notifications** - Announce upcoming changes to feature availability in your account.
- **Billing and Renewal Notices** - Alert you to payment requirements when you purchase new features and notify you when it is time to renew your contract with NetSuite.
- **Legal Notifications** - Notify you of changes that require administrator acceptance, such as a modification to the Terms of Service (TOS).
- **Scheduled Maintenance** - Provide the date and time when scheduled maintenance tasks may affect access to your account.
- **Service Release Notifications** - Occur prior to the release of a new version of NetSuite. These notifications provide information about access to the Release Preview environment, and the time-frame when your account will be upgraded.

Walkthrough: Define Preferences

General Preferences

Printing & Fax

Email Preferences

Review Additional Sandbox Information

Use Case/Scenario: The administrator can set company-wide preferences and settings. If using a sandbox, review the related information.

General Preferences

Go to **Setup > Company > General Preferences**
Company preferences supersede individual user preferences:

- On the top of the page you define how information is entered and formatted, and set default values
- On the **Overriding Preferences** subtab, you may disallow the user's ability to override settings
- Note that the **Centers** subtab is related to Web sites; connect your company web site's look and feel with the NetSuite application by specifying a landing page when employees, customers or partners log out.
- Note: New accounts will have a default of 180 days in the **Password Expiration in Days** field. Please refer to related topics in SuiteAnswers.

Tips: General Preferences

Standard NetSuite Account common tips:

- Set company-wide formatting for consistency of data entry
- If using NetSuite payroll, do not “Allow free form states in addresses”
- If your business addresses individuals as Customers, Vendors or Partners, you may want to enable “**Show Individuals as Contacts**”
    - Displays individual customers also as Contacts in your account
- Consider setting these settings for all users:
    - **Show List When Only One Result**

Printing, Fax & Email Preferences

Set company-wide Preferences:

- Go to **Setup > Company > Printing & Fax**

    - Set printing defaults for Transactions, Check Printing, and PDFs
    - Define fax defaults and fax service

- Go to **Setup > Company > Email Preferences**

    - Determine email defaults for Transactions, Templates, and other functionality
        - Have your administrator review Domain Key Identified Mail definitions to increase your delivery rates; this is important for email marketers

Tips: Printing & Fax Preferences

Printing:

- Place disclaimers on individual forms rather than globally. This enables using different disclaimers for different locations and purposes
- PDF definitions may improve the look of printed forms:
  - Add Extra Space Between Items
  - Line Spacing
  - Extend columns to bottom of page

FAX:

- Set up a separate email account, for registration with your fax provider, to receive bounced efaxes
- Remember faxes are not always sent immediately; when you click FAX, NetSuite creates a PDF and sends it to the Fax service

Tips: Email Preferences

General and Transactions Options:

- **From Address for Emailed Forms:** enter an email address
- If you do not set this preference, the sender of each saved search's emails defaults to be the search owner
- Review the "**Send to all Administrators**" setting
- Use Popup for Main Transaction Email Button to edit email

Release Sandbox and Release Preview Options:

- Define email **Sandbox Options** that are separate from your email **Release Preview** Options
  - **Sandbox** accounts have configuration, data, and customization identical to your production account
    - Multiple sandbox accounts can be provisioned for each production account
    - Actions in sandbox accounts (transaction entries, record deletions, and form customization) have no effect on your NetSuite production account
  - A **Release Preview** account is part of the phased new release process and is an environment in which to test data and workflows; note that it runs separately from your production account
- Specify where to send emails, from the respective accounts, or suspend emails

Additional Sandbox Information

Sandbox accounts provide ideal environments for:

- Testing customization elements before deployment
- Fixing issues with existing customizations
- Trying out third-party integration features like Payroll or Credit Card Processing
- Training employees in existing and new business practices in an environment identical to your production account

Sandbox accounts can be refreshed from production upon request:

- Copies all configuration, data, user passwords, and customizations from your production account into the sandbox account
- Any changes you have made to the sandbox account are overwritten
- Go to **Setup > Company > Sandbox accounts** to track refreshes: system notes are not included in the data that is refreshed – *Contact support if you get an error message.*

Sandbox Expiration Notification

Renewing your sandbox account before it expires is very important:

- The status of a sandbox account is automatically set to “Inactive” the day it expires
- You cannot log in to an inactive sandbox, and data from expired sandbox accounts is automatically purged 30 days after attaining an inactive status

Receive email notification before a sandbox account expires; renew the account without an interruption of availability or potential data loss

- The notification process is completely automated, no action on your part is required
- If you are the administrator of the sandbox, you will be notified by email several times before the expiration date, giving you time to renew your sandbox account

Introducing OneWorld Classifications

- Define New Subsidiaries
- Review Subsidiaries
- Create Elimination Subsidiaries

Use Case/Scenario: Companies that are running multiple legal entities, in a single NetSuite account, are going to use OneWorld classifications or records

OneWorld; Subsidiaries

New Subsidiaries – Go to **Setup > Company > Subsidiaries > New**

NetSuite OneWorld allows data management for a hierarchical structure of separate legal entities, or subsidiaries, structured as a tree rolling up to the root, or top-level parent, subsidiary. NetSuite supports 124 subsidiaries and 1 root (parent):

- Setup base currencies before setting up a subsidiary
- Select the country. This determines the NetSuite Edition and sets tax nexus
- A transaction posts to one subsidiary, except an intercompany transaction

If you enter in the wrong information and save the subsidiary, some fields will be locked for editing.
If necessary mark the incorrect subsidiary as inactive and create a new subsidiary with the correct information.

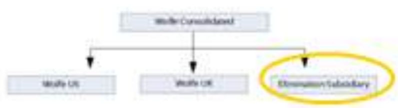
Best Practices: OneWorld Subsidiaries

Plan and document, in visual form, your subsidiary hierarchy, Design the hierarchy around accounting and reporting requirements; consider working with NetSuite Professional Services to assist with setting up your hierarchy

- Use top-down setup, parent with children
- Once defined in NetSuite it is difficult to change
  - If in the production account, with data, customer must buy a sand box before changing
- Create up to 124 subsidiaries in addition to the root (parent).
  - ***An inactive subsidiary does not count towards the total number***
- If subsidiaries share multiple nexuses, set up in the proper order:
  - Subsidiary
  - Tax Agency
  - Nexus
  - Tax Code
- Select languages to translate Web site information and to print on transactions. NOTE: Multiple languages features must first be enabled.
- Different types of Subsidiaries:
  - Standard
  - Elimination
  - Reporting
  - Statutory to GAAP

Overview of OneWorld Elimination Subsidiaries

Set up an elimination subsidiary as child of each parent entity, with the same base currency:



- License fees for subsidiaries do not include charges for elimination subsidiaries, and elimination subsidiaries do not count toward the maximum of 125 subsidiaries.
- Elimination subsidiaries are only associated with journal entries
- Base currency should be same currency as parent
  - Select the currency for the Elimination subsidiary, and then check the Elimination checkbox

Another User Case Example: A company in India may keep their accounts in the local books/currency. Create a subsidiary of that company to hold adjustments between the local practices and the accounting principles that are used for consolidating in total.

OneWorld: Elimination Subsidiaries Set Up

Create elimination subsidiary for each parent subsidiary to eliminate revenue or expense at the consolidated level, only journal entries post to elimination subsidiaries:

Go to **Setup > Company > Subsidiaries > New**

- Enter subsidiary information
- Consider using the word “Elimination” in the name of the subsidiary
- **Set the Currency for the subsidiary**
- Check the Elimination checkbox

Walkthrough: Other Setup

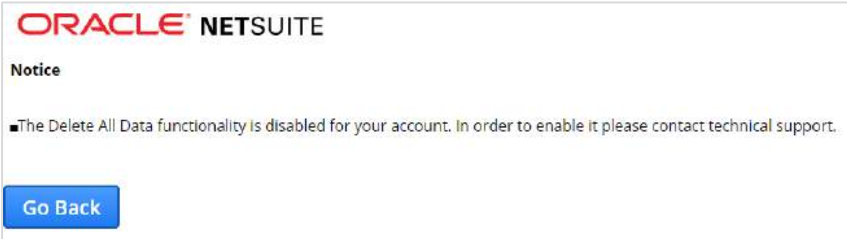
Delete All Data

View Billing Information

Use Case/Scenario: Administrators are the only users that should investigate the ability to delete all account data. Billing information provides the administrator with visibility into the provisioned NetSuite account modules and components.

Delete All Data

Navigate to **Setup > Company > Delete All Data**:



- Requires contacting technical support
- Can be used for removing all test data, but resets the account to a "blank shell"

View Billing Information

Go to **Setup > Company > View Billing Information**

Review your product subscription:

- View the Product you are using, such as: NetSuite, NetSuite CRM+
- View the Anniversary Date, either the date of when your service began or the most recent renewal date
- Review your product subscription:
  - Billable Components
  - Add-On Modules
  - Provisioning History
  - Component Usage

Now It's Your Turn

- 01: Set Company Information
- 02: Enable Features
- 03: Rename Records and Transactions
- 04: Turn Off Auto-Generated Numbers
- 05: Set Company Preferences
- 06: Set Printing, Fax & Email Preferences
- 07: Create New Subsidiaries *OneWorld*
- 08: Create Elimination Subsidiaries *OneWorld*

Use Case/Scenario:

- As the administrator, begin to configure the NetSuite application for your company's needs
- Allow 20 - 35 minutes

NETSUITE | SuiteTraining

Hands-on Exercises

Set Your Company Preferences

Suggested Time to Complete Exercises: 1 hour

Exercise 01: Set Company Information

Time: 2-5 minutes

Scenario: The Chatham Company's requirements are defined in the BRD. Now you begin to enter data into your NetSuite account to satisfy these requirements. In this exercise:

- Enter the company information in the blank account

1 Navigate to **Setup > Company > Company Information**.

2 At the top of the page enter the **Company Name**: Chatham Company

3 Select **California in** the **County/State/Province** dropdown list, if not already populated in our training account. We need to do this since we were issued a US Edition account.

4 Confirm the **Currency Locale** as **United States (English) or Currency as USA**; selecting a country determines the currency for your account.

5 Select January as the **First Fiscal Month**

6 Select the local time zone, from the **Time Zone** dropdown list, to represent the time zone of the company's headquarters.

7 Scroll down to the **Address** field, click the **Edit** link.

8 In the pop-up window, enter / confirm the following information.

   a. Country: **United States**

   b. Addressee: **Chatham Company**

   c. Address1: **1500 3rd St**

   d. Address2: Suite **100**

   e. Zip: **9440**3 and click the tab key

   f. City (San Mateo) and State (CA) fill in automatically

   g. Click **OK**

9 Click **Save** when you are done. When you click Save, the system redirects you to Setup Manager.

10 End.

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Exercise 02: Enable Features

Time: 2-5 minutes

Scenario: The administrator is responsible for enabling features per your company's requirements. At this stage, you may not know all the features that you will be using. Other features will be enabled in later modules. In this exercise:

- Enable key features per discussions and the BRD
- Enable Multi-Language for language translation
- Enable Multiple currencies to conduct and manage books in different currencies

1. Navigate to **Setup > Company > Enable Features**.
2. Under the Company subtab, check the following features: If the features are already checked, leave them checked and do nothing. Do not UNCHECK anything without direction.
    a. **Classifications**:
        i. Departments
        ii. Locations
        iii. Classes
    b. **Projects:** Uncheck any features that are enabled. Projects are not part of this class. Click through any pop-up windows.
    c. ERP General
        i. **Uncheck** Multiple Units of Measure, if checked.
        ii. **Review** the field level help for Use Deletion Reason
        iii. **Select Multi Subsidiary Customer**; Chatham did specify this in their BRD as being useful.
    d. **Resource Management: Uncheck** Resource Allocations, if checked.
    e. International:
        i. **Multi-Language** confirm or mark as checked
        ii. Multiple Currencies - **Check this box** to conduct business with customers and vendors that use currencies other than the currency in which your company manages its financials.
            1. Click **OK** in the redirect pop-up window
        iii. **Currency Exchange Rate Integration** and click I **Agree**.
    f. Data Management:

i. Inline Editing

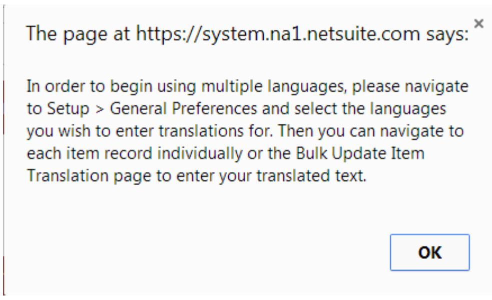
ii. File Cabinet

iii. Duplicate Detection & Merge: Click **OK** in the redirect pop-up window

iv. Do nothing in **Access**, **Social** or **Mobile** sections, if displayed.

g. Go to the **Analytics** subtab, **Dashboard**s section and select **KPI Scorecards**, if not already checked.

h. Click **Save**. Note: A Message from webpage popup displays. Review the information, click OK, and continue to the Set Up Manager.



3 Go to **Home> Set Preferences, General** subtab.

a. In the **Localization** section select your preferred language for each of the following:

i. Language from the dropdown list of values.

ii. Search Sorting from the dropdown list of values.

iii. Language of the Help Center from the dropdown list of values.

b. Click **Save.**

4 End.

Exercise 03: Rename Records and Transactions

Time: 2-5 minutes

Scenario: NetSuite records and transactions may be renamed to fit your company's terminology. In this exercise:

- Available records are dependent upon the enabled features
- Rename NetSuite standard classifications (department, location and class) per the BRD
- Rename a transaction record and reorder the account list

Modify Records and Transactions

1. Navigate to **Setup > Company > Rename Records/Transactions**.
2. Rename or confirm the following records as shown:
   a. Name for Department: **Division**
   b. Name for Location: W**arehouse**
   c. Name for Class: **Sales Channel**
   d. Name for Other Name: **Dono**r (to attach a charity or a donor to a transaction without making the donor a customer)
3. Go to the **Transaction Names** subtab and confirm the following:
   a. Estimate: **Quote**
4. Click on the **Account Type Names** subtab.
   a. Move the **Expense** field to the top of the list.
   b. **Hint:** Select the **Expense** field row and click the **Move To Top** button or drag and drop the row to the appropriate position.
5. Click **Save** when you have finished.
6. End.

Exercise 04: Turn Off Auto-Generated Numbers

Time: 2-5 minutes

Scenario: The Chatham Company will identify its customers by name. In this exercise:

- Turn off the auto-generated numbers feature.

1. Navigate to **Setup > Company > Auto-Generated Numbers.**
   a. Under the **Entities** subtab remove any existing checkmarks in the Enable column.
      i. Note: Subpartners, under Within Parent Group column, is checked. No action is required.
   b. Review the **Document Numbers** subtab and review any checkmarks under Allow Override.
2. Click **Save**.
3. **End**.

Exercise 05: Set General Preferences

Time: 2-5 minutes

Scenario: Setting preferences at the company level applies these preferences for all users. In this exercise:

- Verify and set preferences for all users and disallow users' ability to change specific preferences
- Do not uncheck any options, unless instructed.

1 Navigate to **Setup > Company > General Preferences**. Set the following values:

   a. Date Format: **MM/DD/YYYY**

   b. Long Date Format: **Month DD, YYYY**

   c. Time Format: hh:mm **AM/PM**

   d. Number Format: **Your choice, consider your currency**

   e. Negative Number Format: **Your choice**

   f. Phone Number Format: Your choice – Interesting note, by defining a phone number format, this will carry over to any external forms that you create for your account. We will see this in a later module, when we create an Online Marketing Form.

   g. First Day of Week: **Sunday**

2 Check or confirm that the following choices are checked:

   a. **Pre-Populate contact Address** to have the contact's address fields pre-populated from the Customer Address fields.

   b. **Show Employees as Contacts** box to create a contact record for each employee record.

   c. **Show Display Name with Item Codes** box. When you turn on this preference, both the item name and its item code display in the drop-down lists.

3 Continue down and define the following:

   a. **Password Policy**: leave as Weak. This is not recommended, but we are doing it for our training environment.

   b. **Minimum Password Length** leave as eight (8). Be sure to review the field help for additional information.

   c. **Password Expiration in Days**: review field help, but do not enter in any value.

      i. **Best Practice on Passwords NOT in a training account,** but in your production account, use the following settings: Password Policy should be set at strong. Set a **Minimum Password Length:** 10 characters, at least 3 of these four-character types — uppercase letters, lowercase letters, numbers, non-alphanumeric ASCII characters

4 Scroll down and review field help for the **Horizontal Labels** checkbox. You do not have to check it.

5 On the right-hand side **review current settings** and **field help** for the following:

a. **Log System Notes** on Update Only

b. **Show List When Only One Result** to provide users with a consistent view of search results. **Please select this.**

c. **Default Customer Type** – leave as Company

d. **Default Vendor Type** – leave as Company

e. **Default Partner Type**– leave as Company

f. Maintenance Complete Email Notification

6 On the lower half of the page are several preferences that you can check or uncheck to allow or prevent users from overriding.

7 Uncheck the following settings:

a. Customer Credit Limit Handling

b. Date Format

c. Phone Number Format

d. Vendor Credit Limit Warnings

8 Click **Save** when you are done.

9 **End**.

Exercise 06: Set Printing, Fax & Email Preferences

Time: 2-5 minutes

Scenario: The company's preferences can be set for Printing, Fax, and Email. In this exercise:

- Set check printing preference, review FAX information
- Enable Email button

1 Navigate to **Setup > Company > Printing & Fax**.

2 The **Printing** subtab displays.

3 In the **Check Printing** section, select **Voucher** for the **Default Check Type**.

   a. Standard option prints three checks to an 8.5-by-11-inch sheet without any voucher/stubs.

   b. Voucher option prints a single check per page with voucher information at the bottom.

4 Go to the **Fax** subtab and review the information.

5 Click **Save**

6 Navigate to **Setup > Company > Email Preferences**

7 On the **Transactions** subtab, In the **Transactions** section, check **Use Popup For Main Transaction Email Button.**

   a. Note: If you do not see this, the associated feature may have been turned off. Go to Setup > Company > Enable Features, then the CRM subtab, and on the right-hand side select the Mail Merge feature

8 Go to the **Sandbox and Release Preview** subtab, **Sandbox Options** and **Release Preview Options** sections. Please review field help and the Help Center for more information.

9 Click **Save** when you are done.

10 End.

Exercise 07: Create New Subsidiaries *OneWorld*

Time: 2-5 minutes

Scenario: Per the BRD, the Chatham Company currently has two subsidiaries and these subsidiaries will process transactions in their local currency. In this exercise:

- Create two subsidiaries.
- IMPORTANT: If you create and save the subsidiary with incorrect information, you may not be able to edit that information. If necessary, mark the incorrect subsidiary inactive and enter in a new subsidiary with correct information.

1 Navigate to **Setup > Company > Subsidiaries > New**.

2 Enter the following details for the new subsidiary record:

   a. Name: **Germany**

   b. Subsubsidiary of: **Parent Company**

   c. Uncheck Subsidiary is Inactive, if checked

   d. Document Number Prefix: **DE** (as in Deutschland)

   e. Currency: **Euro** (If the currency field is not visible, you may not have enabled all the features in Exercise 02

   f. Country: **Germany**

   g. Note: The **Edition** field defaults to XX upon choosing the Country.

3 If the Accounting Advanced Feature for Multiple Calendars was enabled, two additional fields are visible: Fiscal Calendar and Tax Fiscal Calendar. If these fields are displayed, you may review field help for **Fiscal Calendar** and **Tax Fiscal Calendar**, but no changes are required. At this time, Chatham is only maintaining a single, Standard Fiscal Calendar.

4 Click **Save** when you have finished. (If you are returned to the Subsidiaries page, then click the **View** link next to the Germany subsidiary.)

5 Select the **Nexuses** subtab and see that a Nexus has been created for the Germany subsidiary.

6 Go to **Actions** and select **New**.

7 Repeat these steps to create a subsidiary for Italy using the following details for the new record:

   a. Name: **Italy**

   b. Subsubsidiary of: **Parent Company: Germany**

   c. Uncheck Subsidiary is Inactive, if checked

   d. Document Number Prefix: **IT**

e. Currency: **Euro**

f. Country: **Italy**

g. **Note**: After we study how to create a new currency, we will create two more subsidiaries (including another Subsubsidiary of Germany).

8 Click **Save** when you have finished.

9 End.

Exercise 08: Create Elimination Subsidiaries *OneWorld*

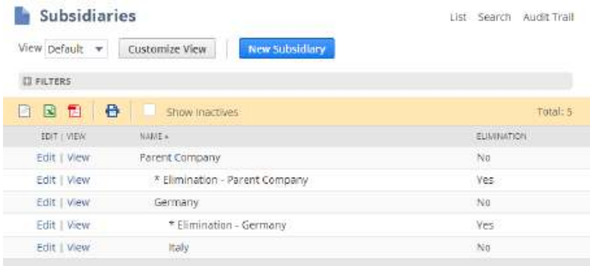
Time: 2-5 minutes

Scenario: Use elimination subsidiaries to eliminate transactions when doing business between subsidiaries. In this exercise:

- Create elimination subsidiaries for each parent subsidiary.
- IMPORTANT: If you create and save the subsidiary with incorrect information, you may not be able to edit that information. If necessary, mark the incorrect subsidiary inactive and enter in a new subsidiary with correct information

1. Navigate to **Setup > Company > Subsidiaries > New**.
2. Enter the following details for the new elimination subsidiary record:
    a. Name: ***Elimination – Parent Company**
    b. Subsubsidiary of: **Parent Company**
    c. Uncheck Subsidiary is Inactive, if checked
    d. Select **California** from the State/Province dropdown list
    e. Country: **United States**
        i. Note: The **Edition** field defaults to US when you choose the Country.
    f. Currency: **US Dollar or USA** (Set the currency BEFORE checking Elimination)
    g. Elimination box: **Checked**
3. Click **Save & New** when you have finished.
4. Repeat these steps to create an elimination subsidiary for Germany:
    a. Name: ***Elimination – Germany**
    b. Subsubsidiary of: **Parent Company: Germany**
    c. Uncheck Subsidiary is Inactive, if checked
    d. Currency: **Euro** (Set the currency BEFORE checking Elimination)
    e. Elimination box: **Checked**
    f. Country: **Germany** (Edition defaults to XX)
5. Click **Save** when you have finished.

6 Navigate to **Setup > Company > Subsidiaries** and confirm that your company structure looks like this:



7 If you structure does not look like the above, then edit.

8 Click **Edit** next to the subsidiary you want to correct

a. In the subsidiary record and mark **Inactive**.

9 Now enter the subsidiary correctly.

10 End.

Activity: True or False

Indicate if the statement is true or false.
1. The Setup Manager guides you through the tasks to setup NetSuite for your company.
2. Administrators can set company-wide formatting preferences.
3. Anybody can use the "Delete All Data" function.
4. *OneWorld:* Plan and design your company hierarchy before entering subsidiaries
5. *OneWorld:* Elimination subsidiaries should be set for each Parent.

Additional Resources

NetSuite Help Center:

- Account Setup

SuiteAnswers Learning Center: Training Videos

- New Feature Training
- NetSuite OneWorld
- Administration/Data

NetSuite Data Model

About this Module

NetSuite is your single, data source for the data your company collects:

- How is data classified, sorted and recorded?
- What determines who can access the data?

Objectives

1. Describe the major record types in NetSuite
2. Review relationships between records
3. Consider customization and records
4. Describe dependent and independent entities and how they work together
5. Review the use of forms to access records
6. Examine database relationships
7. Apply NetSuite's data segmentation features to your data sets

NetSuite Data Tables

Utilize one of the following standard tables, which support records, or create a custom record that results in a new table being created:

- **Entity:** people and organizations that you do business with
  - For example: leads, prospects, customers, contacts, employees …
- **Transaction:** represent a financial exchange or value adjustment
  - For example: Sales orders, bank deposits, inventory adjustments …
- **CRM:** activities with customers
- **Item:** goods and services you buy and sell; line items on sales and purchase order forms
- **Custom:** addresses unique needs of your business
  - Use Case: NetSuite Training Services uses a custom record for our course evaluations

Entity Table Types

Entities can be people or companies:

- Customers buy from you, may be a company or an individual
- Vendors sell to you (those who you pay), may be a company or an individual
- Partners are Marketing or Sales Partners, may be a company or an individual
- Employees work for you
- Contacts are people who work for companies and may be associated with multiple companies!
  - **Important!** Employees and contacts are always individuals, not companies
- Parent: Child relationships can be set up for customer, partners, and vendors

Transaction Table Types

Transactions involve the movement of money or adjustment of values:

- **Bank**: tasks conducted with your bank and recorded in NetSuite
  - For example: Make Deposits, Transfer Funds
- **Purchases / Vendors:** Purchasing from vendors, recording bills from vendors
- **Sales:** transactions with your customers
  - Includes such activities as Opportunities, Orders, and Accepting Payments
- **Employees**: includes expense reporting, time tracking, and payroll activities
- **Inventory**: includes inventory management and adjustments

Customer Relationship Management Table Types

Used to help us better how we conduct Customer Relationship Management (CRM):

- **Activities:** using tasks, phone calls, and events to communicate
- **Project Tasks**: part of Advanced Projects and include defining tasks, resources, and gannt charts
- **Cases**: working with support and IT (Help Desk cases)
- **Solutions:** part of issue management
- **Campaigns**: marketing

Item Table Types

What we reflect on sales and purchase order forms:

- **Discounts**
- **Other Charges**
- **Inventory items**
  - Impact the balance sheet
- **Non-inventory items**
  - Do not have a balance sheet impact
- **Service items**

Activity: Complete the Table

Can you think of examples for each type of record?

Type of record	Example
Entity	
Transaction	
CRM	
Item	
Custom	

Customization

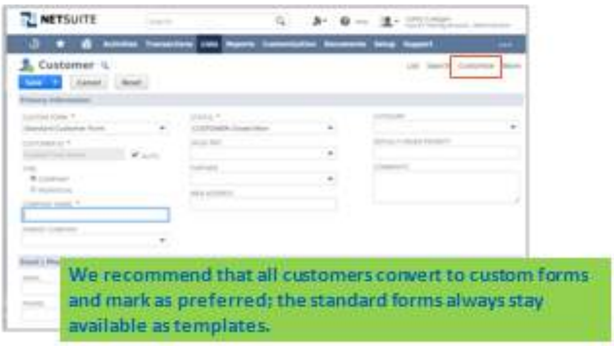
Use customization to capture what you need:

- Modify standard NetSuite records or create new custom records
- Go to the **Customization** menu, review your options
- **Use Case 1**: Capture specific information on a customer record by adding new entity fields
  - **Customization > Lists, Records, & Field > Entity Fields > New**
- **Use Case 2:** Create new record type to capture course evaluations
  - **Customization > Lists, Records, & Field > Record Types > New**

Access Records with Forms

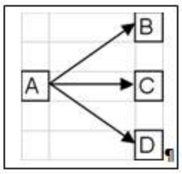
Consider the creation of different form versions for different user roles. Each form can be assigned to a specific role:

- Sales Role can see some subtabs on a customer record:
  - General, Qualification, Sales, Marketing, Address information
- Operations can see additional subtabs on a customer record
  - All the above subtabs
  - Can also view Financial, Access, Workflow



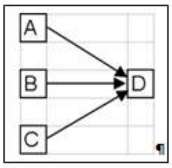
Database Relationships

Within a database, four core methods for relating data together exists.



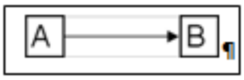
One : Many

- Send One marketing newsletter to many customers
- Create One invoice with Many items



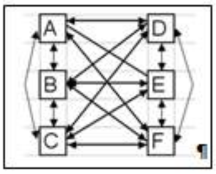
Many : One

- Many people are attending One event
- Many students fill out evaluations for One course



One : One

- One item has One serial number



Many : Many

- Many contacts can be associated with Many companies

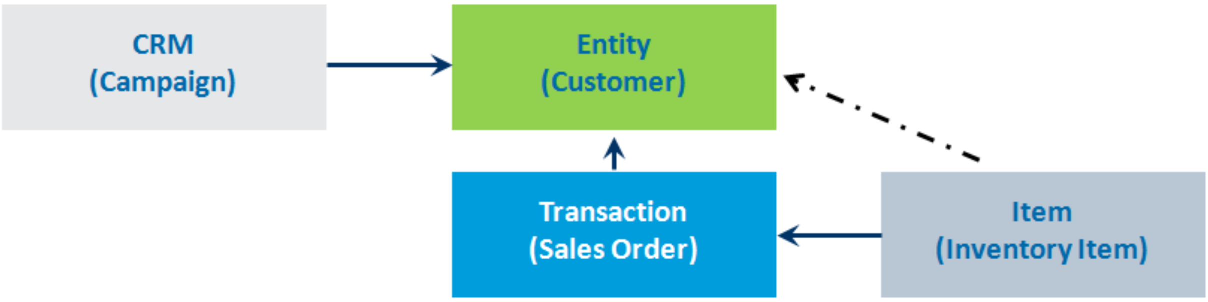
Relationships between Records

Transactions and CRM records are associated to Entities:

- Transactions roll up to a related entity record.
    - E.g. sales orders and campaigns are associated with a customer

Associate Items to Entities and Transactions

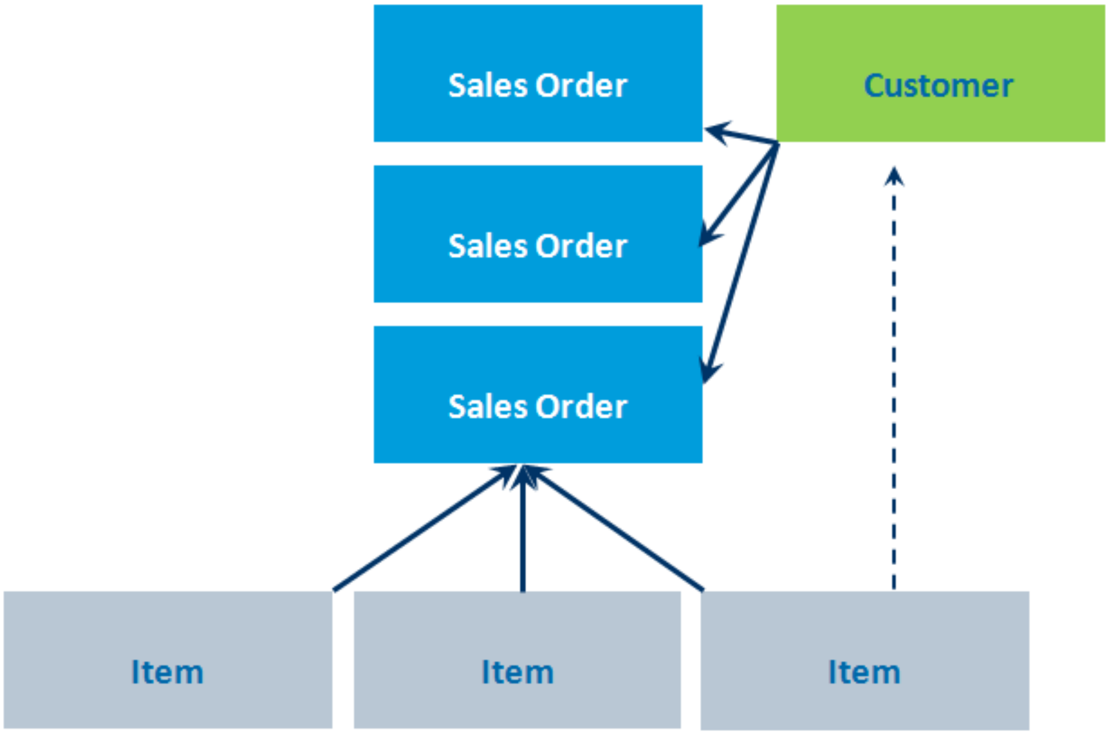
- Tie item records to entities to track purchase history of a customer, then you can offer promotions based upon their purchases
- Associate an item with a sales order



Note: It is important for you to understand how records are related so that you can organize data to fit within the NetSuite database. Likewise understanding the record's relationships is critical for retrieving customer data when generating reports and searches.

One-to-one (1:1) and **One-to-Many (1:M)** relationships can exist between records

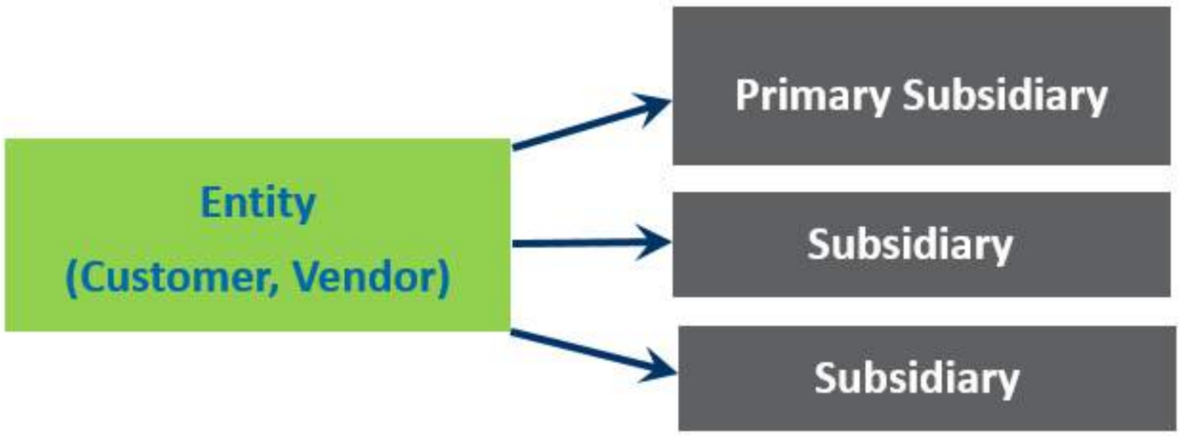
- Each sales order references a single Customer therefore **(1:1)**
- Each Sales Order may have many items thus **(1:M)**
- Each customer may have many sales orders **(1:M)**



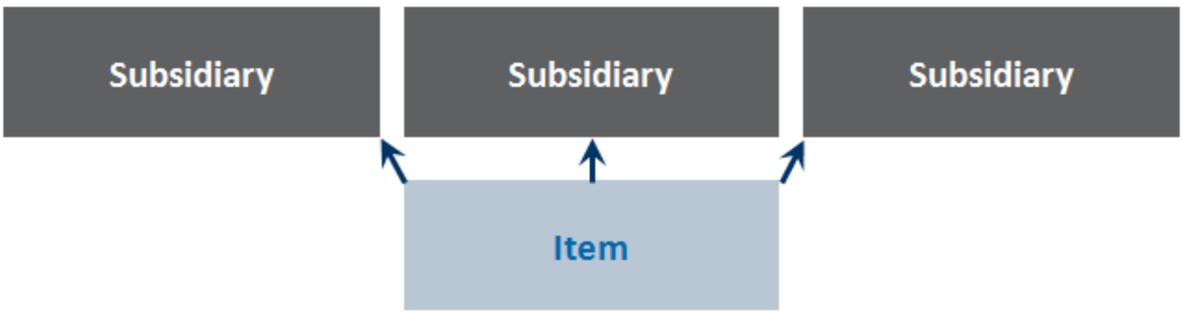
Subsidiary Relationships with Entities and Items

One World allows tying subsidiaries to entities and items:

- An Entity can be associated with multiple subsidiaries
- Enable **Multi Subsidiary Customer** feature
- Turn off Non-compatible other features
    - **Accounting** subtab, **Advanced Features:** Consolidated payments and Intercompany Time & Expenses
    - **Transactions** subtab, **Billing** section: Bill Costs To Customers, Advanced Billing, Charge-Based Billing, and Billing Operations.



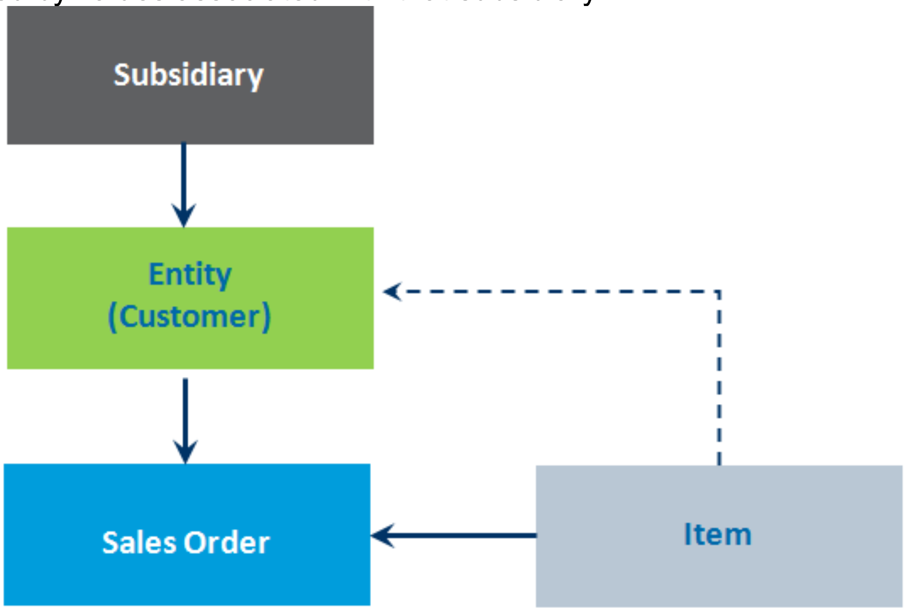
- An Item can be associated with multiple subsidiaries



OneWorld: Subsidiary Relationship with Transaction and Item

Transactions and Items are associated with an Entity. Data displayed, on the Transaction and Items records, is restricted by the Subsidiary associated with the Entity record.

- Transactions inherit their subsidiary from the selected entity (customer or vendor)
- Only items associated with the transaction's subsidiary will be available on that transaction
- Other records (items, departments, locations) referenced on transaction are limited by values associated with that subsidiary

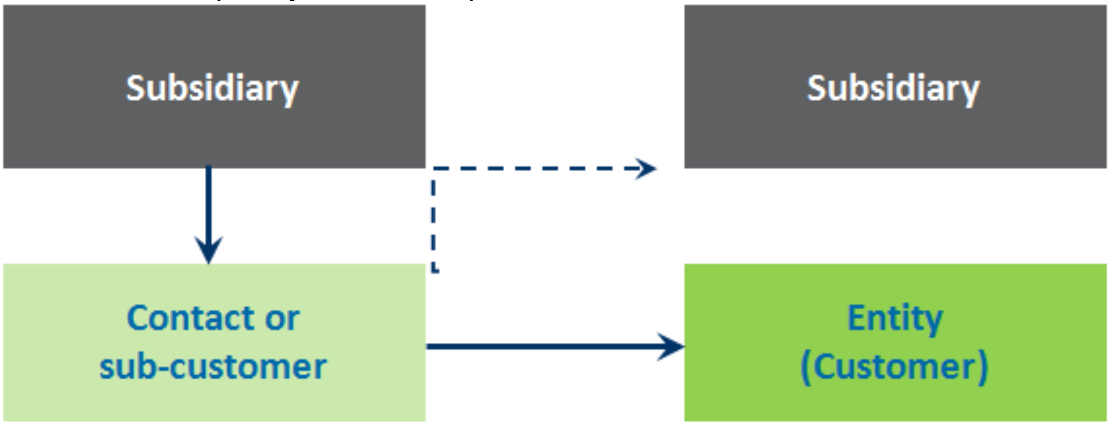


OneWorld: Subsidiary Association

Entities from one subsidiary may be linked to an entity associated with a different subsidiary:

- Contacts associated with one subsidiary can be linked to customer, partner or vendor records associated with another subsidiary
    - Contacts may be associated with more than one subsidiary, because transactions are never entered against the contact
    - Subsidiary is a mandatory field on the Contact Record
        - Contacts are not restricted to the subsidiary; rather the contact is associated with the subsidiary. When you associate a contact with an entity, it does not inherit the characteristics of the entity
- Sub-Customers associated with one subsidiary can be linked to parent customers associated with another subsidiary, only if “Accept Payments at Top Level” is disabled

    Sub-Customers and customers can have different base currencies when “Accept Payments at Top Level” is disabled



Data Segmentation

Organize data to extract and view Business intelligence through alternative lenses, different perspectives and insight:

- Data segmentation groups information in different ways:
    - Entities (Customer, Vendor, Employee, Contacts and Partners)
        - Type
        - Statuses
        - Categories
        - Classifications (can act to restrict Employee access)
        - Demographic Elements (City, DoB, Size)
    - Transaction
        - Statuses
        - Classifications:
            - Departments, Classes, & Locations

Classifications

Measure your business with classifications to track records such as: financial, transactions and employees

- **Departments**: Designate transactions' owner and resources as part of internal team
- **Locations**: Are interrelated with Classes and Departments, and are best applied to places of the business whether virtual or real.
- **Classes**: For wider categorization within your business (Business Unit)
- For example: A cleaning company may want to track income and expenses separately for household and a commercial customer.
    - Setup classes for each of these account types providing the ability to track the financial performance over any given period.
    - The same cleaning company may want to track income and expenses for different departments including; operations, sales & administration.

Use Classifications to **restrict access to system information**

- The impact of classifications (departments and classes) on permissions/role and users' ability to see/do is dependent upon the restrictions set within their roles.

<u>OneWorld Impact</u>

- Departments, Classes and Locations can be restricted to a subsidiary
- Departments and Classes can go across subsidiaries, but locations are a 1:1 relationship and can only be associated with one subsidiary

Walkthrough: Creating a Record

Create a Customer Record

Use Case/Scenario: The administrator is going to enter in a test customer record to examine how information is entered in the NetSuite account.

Create a Customer

Go to **Lists > Relationships > Customers > New:**

- Complete required and optional fields in the different field groupings, such as:
    - Primary Information
    - Email | Phone | Address
    - Classification
- Continue entering information on subtabs such as: Subsidiaries, Relationships, Communication, Address …
- If you want to record contacts for the customer:
    - **Save the customer record first and then add the contact**
        - Populates the contact record with email, phone, address and other information and can be edited
- If you need to update the saved contact's role, go to the customer record and relationship subtab:
    - Click **Update Primary Contact** button, then **Edit** in the pop-up window
    - Change the contact's role and click **Save**

Now It's Your Turn

01: Create Customer Record and Enter Contact

02: Create Customer Record and Enter Contact *OneWorld*

03: Create a Vendor Record and Enter a Contact

04: Create a Vendor Record and Enter a Contact *OneWorld*

05: Enter New Employees

Use Case/Scenario: Become familiar with record entry

- Enter new entity records, Customer and Vendor
- Add a new employee
- Allow 30 - 40 minutes

Exercise 01: Create Customer Record and Enter Contact

Time: 5 minutes

Scenario: The Chatham Company will import most of its existing customers using the Import Assistant. We can also enter data for new entity records manually. In this exercise:

- Enable or Confirm the Multi-Subsidiary Customer feature and disable incompatible features
- Create a new customer record with related contacts
- Enter US phone numbers; allow formatting to be applied

1 Go to **Setup > Company > Enable Features**

   a. **Company** subtab, **ERP** section: Confirm or select **Multi Subsidiary Customer** per the BRD Chatham company wants to use this to create customers across subsidiaries.

   o Disable any incompatible features

      ▪ **Accounting** subtab, **Advanced Features:** Consolidated payments and Intercompany Time & Expenses

      ▪ **Transactions** subtab, **Billing** section: Bill Costs To Customers, Advanced Billing, Charge-Based Billing, and Billing Operations.

   o **Save.**

2 Navigate to **Lists > Relationships > Customers > New**. The Customer Form should be displayed.

3 Enter the following details for the new customer record:

   a. **Company Name**: TEST ABC

   b. **Email**: abc@TEST ABC.com

   c. **Phone**: 6506271000

   d. **Fax**: 6506271001

   e. **Primary Subsidiary**: Parent Company

   f. Note: The Status defaults to CUSTOMER–Closed Won. Leave this default value.

4 On the **Subsidiaries** subtab, in the subsidiary column field, review the available subsidiaries

   a. Select Germany

   b. Click **Add.**

5 Click the **Address** subtab, go to the far-right column, find the **Edit pencil**; click to open a pop-up window.

6 Enter /Confirm the following information, in the pop-up window:

   a. **Country**: United States
   b. **Address 1**: 2955 Campus Drive
   c. **Address 2**: Suite 100
   d. **Zip**: 94403
   e. Click the tab key, on your keyboard, to see City (San Mateo) and State (California) populate.
   f. Click **OK** to close the pop-up window.
   g. Click the **Add** button, to record the address entered.

7 Go to the **Financial** subtab; in the **Account Information** section confirm that the **Primary Currency** has defaulted to US Dollar. If necessary, select it from the dropdown list.

8 Go to the **Currencies** sublist, **Currency** column field, and select **Euro** (this is for the Germany subsidiary).

9 Click **Save** and note the "**Confirmation: Customer successfully Saved**" message at the top of the page.

10 On the **TEST ABC** customer page, scroll down and click the **Relationships** subtab

11 On the **Contacts** sublist, click the **New Contact** button to open a pop-up Contact window.

12 Enter the following information to add the contact with the same address and phone number as the customer record.

   a. **Contact**: this field will populate with information entered in to the Name fields
   b. **Role**: Decision Maker
   c. **Name**: Amy Andrews
   d. **Job Title**: CEO
   e. **Email**: amy@testabc.com

13 Click **Save** to save the contact information.

14 On the **Relationship** subtab, **Contacts** sublist, go to the line for Amy Andrews and see that she is listed as the Decision Maker.

15 Click on the **name** to open the contact pop-up window. Notice that the contact is attached to the customer record. Close the pop up window by clicking on the X.

16 **End.**

Exercise 02: Create Customer Record and Enter Contact *OneWorld*

Time: 5 minutes

Scenario: In this exercise, for OneWorld accounts:

- Create new customer records with related contacts in a subsidiary.
- TIP: Go to NetSuite and refer to the Best Practice "OneWorld Intercompany Order Processing" for more information on setting up customers in a OneWorld Account.

1. Navigate to **Lists > Relationships > Customers > New**. The Standard Customer Form should be displayed.
2. Enter the following details for the new customer record:
   a. Company Name: **TEST German Customer**
   b. Email: **123@TestGermanCust.com**
   c. Phone: **49-69-696-0 (**This is an international number; our defined phone number formatting will not work for international numbers)
   d. Primary Subsidiary: **Germany**
   e. Note: The **Status** defaults to **CUSTOMER–Closed Won**. Leave this default value.
3. On the **Subsidiaries** subtab, in the subsidiary column field, review the available subsidiaries
   a. On a new line, select Italy
   b. Click **Add.**
4. Click the **Address** subtab, go to the **Edit** pencil and click to open a pop-up window
5. Enter the following information, in the pop-up window:
   a. Address 1: **Bergen Strasse 123**
   b. City: **Frankfurt**
   c. Zip: **D-65046**
6. Click **OK** to close the pop-up window.
7. Click the **Add** button.
8. Click S**ave** and note the "**Confirmation:** Customer successfully Saved" message.
9. Scroll down and click the **Relationships** subtab.
10. On the **Contacts** sublist, click the **New Contact** button to open a pop-up Contact window.

11 Enter the following information to add the contact with the same address and phone number as the customer record.

a. Contact: this field will populate with information entered the Name fields

b. Role **Decision Maker**

c. Name: **Dieter Hoch**

d. Job Title: **CEO**

e. Email: **hoch@TestGermanCust.com**

12 Click **Save** to save the contact information.

13 Notice on the under **Relationships** subtab, **Contacts** sublist, Deiter Hoch is listed as the Decision Maker with his other information.

14 End.

Exercise 03: Create a Vendor Record and Enter Contact

Time: 5 minutes

Scenario: In this exercise:

- Create a new vendor record with a related contact. This is the vendor that Chatham will be buying goods and services from and the primary subsidiary will be the Parent Company.

1. Navigate to **Lists > Relationships > Vendors > New**.
2. Enter the vendor's information:
   a. Company Name: **TEST Widget Works**
   b. Email: **info@testwidgetworks.com**
   c. Phone: **6503065555**
   d. Primary Subsidiary**: Parent company**
      i. **Note:** NetSuite allows a vendor to be associated with more than one subsidiary. We will look at this in a later module.
3. Click the **Address** subtab, go to the **Edit** pencil and click to open a pop-up window
4. Enter the following information, in the pop-up window:
   a. Address 1: **20 Kelly Avenue**
   b. Zip: **94019**
   c. Click the tab key on your keyboard; **City** (Half Moon Bay) and **State/Province** (California) fields are automatically populated when the **Zip Code** is entered; for USA only
5. Click **OK** to close the pop-up window.
6. Click the **Add** button.
7. Click **Save** and note the "**Confirmation: Vendor successfully Saved**" message.
8. Scroll down and click the **Relationships** subtab.
9. On the **Contacts** sublist, click the **New Contact** button to open a pop-up **Contact** window.
10. Enter the following information to add the contact with the same address and phone number as the customer record:
    a. **Contact:** this field will populate with information entered in the Name fields
    b. Role: **Primary Contact**
    c. Name: **John Brown TEST**

   d. Job Title**: Account Manager**

   e. Change the email from info@testwidgetworks.com to jbrown@testwidgetworks.com

11 Click **Save** to save the contact information.

12 Notice on the **Relationships** subtab, **Contacts** sublist, **John Brown TEST** is listed as the **Primary Contact** with his other information.

13 Click **Home.**

14 **End.**

Exercise 04: Create a Vendor and Enter Contact *OneWorld*

Time: 5 minutes

Scenario: In this exercise, for your OneWorld account

- Create a German Vendor that Chatham can purchase from when doing business in their German subsidiary.

1 If still viewing TEST Widget Works, Select New from the Actions dropdown list. Or, navigate to **Lists > Relationships > Vendors > New.**

2 Enter the Vendor's information:

   a. Company Name: **Test German Vendor**

   b. Primary Subsidiary: **Germany**

   c. **Note**: NetSuite allows a vendor to be associated with more than one subsidiary. We will look at this in a later module.

3 Click the **Address** subtab, go to the Edit pencil and click to open a pop-up window

4 Enter the following information, in the pop-up window:

   a. Address 1: **Heidermanstrasse 164**

   b. City: **Munchen**

   c. Zip: **D-80939**

5 Click **OK** to close the pop-up window.

6 Click the **Add** button.

7 Click **Save** and note the "**Confirmation**: Vendor successfully Saved" message.

8 Scroll down and click the **Relationships** subtab.

9 On the **Contacts** sublist, click the **New Contact** button to open a pop-up **Contact** window.

10 Enter the following information to add the contact with the same address and phone number as the customer record.

   a. Contact: this field will populate with information entered the Name fields

   b. Role **Primary Contact**

   c. Name: **Mark Schwarz TEST**

   d. Job Title: **Account Manager**

11 Click **Save** to save the contact information.

12 Notice on the under **Relationships** subtab, **Contacts** sublist, **Mark Schwarz TEST** is listed as the Primary Contact with his other information.

13 **End.**

Exercise 05: Enter New Employees

Time: 5 minutes

Scenario: To better understand how records are stored, you are going to investigate the employee record.

In this exercise:

- Enter two (2) new employees, Amy and Bob
- They will be early testers of the NetSuite Account during the implementation project

1. Navigate to **Lists > Employees > Employees > New**.
2. Enter the employee Name: **Amy Nguyen**.
3. Enter **Support & Sales Rep** as the Job Title.
4. In the **Classification** section choose **Parent Company** under **Subsidiary**.
5. Go to the **Human Resources** subtab. In the **Job Information** section, click the **Sales Rep** checkbox.
6. (In a later module, **Customer Support and Service** feature will be enabled, allowing the display of a **Support Rep** field is available on the **Human Resources** subtab)
7. Click the **Save and New** button to save the employee record and add a second employee.
8. Repeat steps 2 to 4 and add **Bob Smith** as an employee. Make him a Sales Rep. Enter **Sales Rep** as the **Job Title**. Choose **Parent Company** under **Subsidiary**.
9. On the **Human Resources** subtab, click the **Sales Rep** checkbox.
10. Click **Save**.
11. Navigate to **Lists > Employees > Employees**.
12. **Confirm that both Amy Nguyen and Bob Smith are in listed**. If not, enter in the missing employee.
13. **Note**: Cathy Cadigan was set up at the time the account was provisioned. If the display of her name as Cathy Cadigan Cathy Cadigan, this is due to the original naming configuration when the account was set up.
14. **End.**

NetSuite Help Center:

- Account Setup: Using Departments, Classes, and Locations
- NetSuite Basics: Working with Records

SuiteAnswers Learning Center:

- New Feature Training
- Items/Fulfillment/Billing

NetSuite Roles and Permissions

About this Module

Roles are the foundation for data security in your NetSuite account:

- Roles are defined by permissions and restrictions
- Permissions define a user's access to data and govern the user's authority to work with that data
- Understanding the function of Roles and Permissions is important as you set up users in the account

Objectives

1. Describe NetSuite's standard Roles and Permissions
2. Create custom Roles based on NetSuite standard Roles
3. Define Permissions to custom Roles controlling access to data
4. Use Global permissions
5. Add new employees to the account
6. Assign roles to employees
7. View the Login Audit Trail

Roles Overview

A set of **Standard Roles** is provisioned in your NetSuite account:

- **Note:** NetSuite recommends creating and assigning custom roles, which we will cover in a later module

A **User** is anybody with access to your NetSuite Account: employee, customer, partner, or vendor

A **role** is a configured access that is assigned to users, and defined by:

- A set of permissions
- A level that is set for each granted permission
- Restrictions that modify permissions

Implementation Considerations

The following are some questions that you may need to consider:

- What Roles are needed in your company?
- How many users per Role?
- Who will manage these Roles?
- What are the high-level functions/Permissions the Roles will need?
- What are sensitive areas of information that need to have limited access?
- What do I NOT want these Roles to see/access?
- Are there issues with Sales Reps seeing or having access to other Reps' customers?
- What standard NetSuite Role can I start from?

Defining Permission Levels for the User

A **set of permissions** is provided in your NetSuite Account:

- Governs and defines a user's access and view of your account data

Each granted permission is assigned an **access level**

A permission can be **removed** to disallow access

Security Layers on a Role

T Security layers are applied to a role and govern interaction with data, for example: ***Sales person / rep type of role and that role will work with sales orders***

- **Permission to Edit Sales Order** = Edit sales orders (from anyone)

- **Restrict to** only edit **OWN order -** this modifies the permission
  - Edit own sales orders, or those belonging to my department, location

- **Open fields** for assignment/ viewing, e.g. assign any rep to an order
- **Assign a Custom form** to control the view; assign to the role

Centers Overview

Role–specific centers determine the set of tabbed pages that displays, to optimize navigation for the role:

- A list of the standard Centers is available in Help.
- Administrator defaults to **Classic Interface**:
  - Includes Transactions and Lists between Activities and Reports
- The following centers are examples of different menus displayed between Activities and Reports
  - **Accounting Center** for accounting and finance staff: Customers, Vendors, Payroll and HR, Financial
  - **Shipping Center** for warehouse staff**:** Shipping, Receiving, Inventory
  - **Sales Center** for sales staff**:** Leads, Opportunities, Customers, Forecast
- Roles, other than the Administrator, can switch to the Classic Interface:
  - ***Home > Set Preferences > Appearance > Use Classic Interface***

Center | Role Relationship | Navigation

The Navigation paths control access to data and relates to tasks for a role; this is a portion of a list, in Help, of NetSuite standard centers and their supported roles.

- Administrator role navigation for customer or inventory tasks:
  - For example: Transactions > Sales > Enter Sales Orders
  - For example: Transaction > Inventory > Adjust Inventory
- Sales Role has tasks associated with working with customers:
  - For example: Customers > Transactions > Sales Orders > New
  - Warehouse Role has tasks associated with shipping and inventory: For example: Inventory > Inventory > Adjust Inventory

Here are **pages common to all centers**:

- Home
- Activities
- Documents
- Setup

Switching Between Multiple Roles

Employees can use different roles to do their work:

- Hover over your login profile, top-right side of the page, to view assigned roles
- If necessary, click on View All Roles
- Click the role to select from the assigned roles list

Set a different color scheme for each of your assigned roles under Home > Set Preferences > Appearance

Standard and Specialty Roles

Standard Roles are typical company positions with predefined Permissions:

- Accountant
- Warehouse Manager
- Sales Rep, and so on
- Review the Standard Roles Permission Table in Help

NetSuite recommends that Standard roles should *always be customized* to meet your company's specific needs. Again, review the Standard Roles Permission Table in Help.

Other types of roles are available, review Help for more information:

- Specialty Roles: Customer Center, Vendor Center, Partner Center
- Discounted Roles: Employee Center, Advanced Partner Center

Activity: True or False

Indicate if the statement is true or false.
1. A role is a set of permissions governing access to NetSuite data
2. A NetSuite center is where you can find help
3. A user can have multiple roles

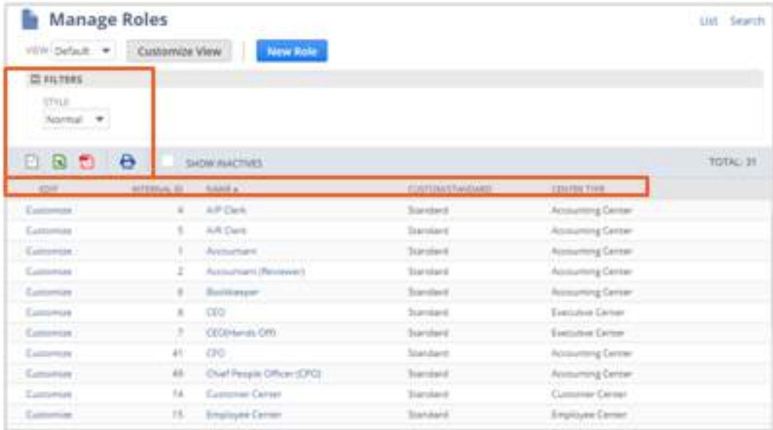
Walkthrough: Review Standard Roles and Compare

- Access Standard Roles
- Discuss Administrator Role
- Show Role Differences

Use Case/Scenario: Prepare to work with roles:

- Look at the standard list of roles, and associated centers, provided in the NetSuite account
- Discuss the Administrator Role
- Identify difference between roles

Access Standard Roles



- Go to **Setup > Users/Roles > Manage Roles**
- List may be sorted, for example sort on Name or Center Type
- This is the starting point for creating custom roles

Administrator Role

Your NetSuite account is provisioned with an Administrator Role:

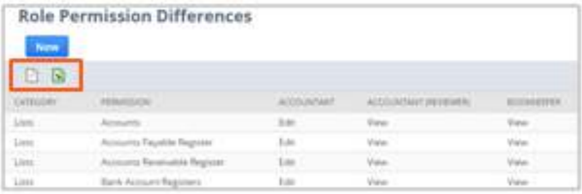
- The Administrator role is a global role that applies to the entire NetSuite account and cannot be customized
  - This may designate the primary administrator for your company
- This is a Full Access Role; the role has ALL permissions at ALL levels
  - Administrators, and users with Full Access roles, must use two-factor authentication in newly-provisioned accounts
- The Administrator role does not show up in access reports, list of roles for reporting, nor a list of roles and permission assignments
- The **role cannot be customized**:
  - Navigate to **Setup > Users/Roles > Manage Roles** and note that Administrator/Full access role is not listed
  - As an alternate solution, you can customize the System Administrator role; the access levels per permission are all set to Full, Edit or View
- Assign a backup administrator with the Administrator role:
  - If your administrator leaves and you do not have a backup, you must contact support
- Administrator versus System Administrator, what is the difference?
  - The administrator has complete control over the account, including being able to delete all data and close account
  - The System Administrator has fewer permissions than the Administrator and cannot use delete

Show Role Differences:

Go to **Setup > Users/Roles > Show Role Differences**
Ability to view and compare differences in Permissions between Roles:

- Define the **Base** and **Compare** to roles, and check **Only Show Differences**

- The **Role Permission Differences** page displays; permissions are listed by category (Lists, Reports, Transactions, Setup)
    - Review assigned permissions and level of permissions
    - This list may be exported out of NetSuite



Walkthrough: Create Custom Role

Select a Standard Role

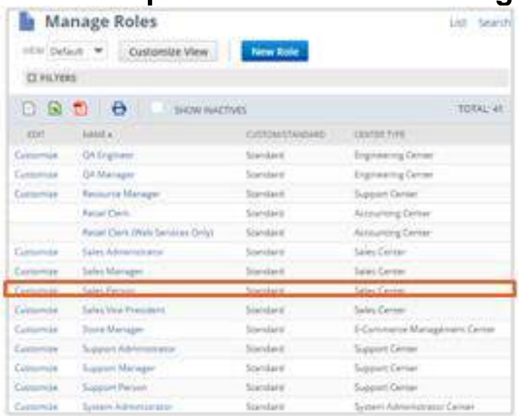
Customize a Role

Use Case/Scenario: Sales management has asked that a custom sales role be created:

- Create a custom sales person role, based on a standard role in NetSuite, paring down some permissions
- Define the Customer form for Sales, custom form, as the preferred form for this role
- This custom role can be assigned to new and existing sales people

Select a Standard Role:

Go to **Setup > Users/Roles > Manage Roles**



NetSuite recommends not using Standard Roles for your users:

- May require frequent changes for your user
- Does NOT meet the best practice of granting the least number of permissions, for any given user to do their job, and could jeopardize account security

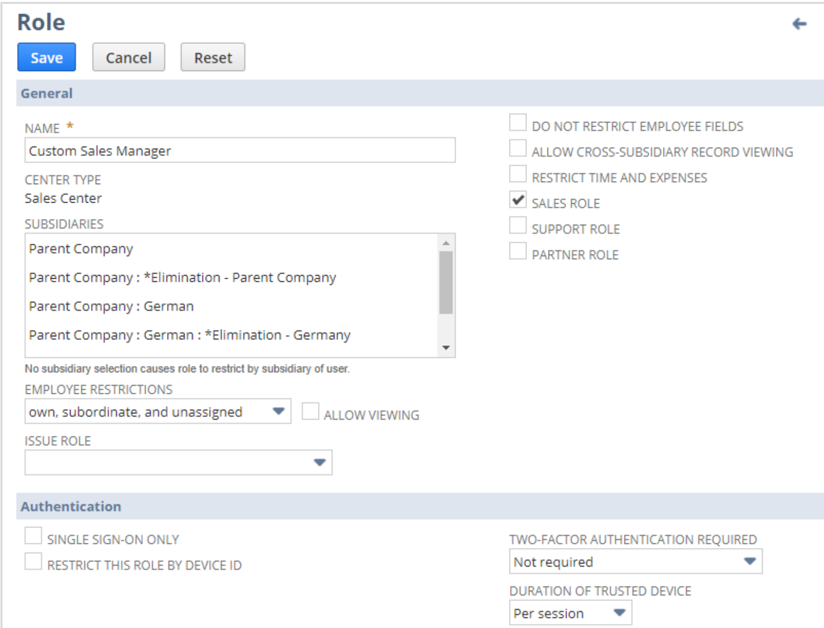
Select the role that will be the basis for your custom role:

- Go to **Setup > Users/Roles > Manage Roles**
- The Manage Roles page displays and may be sorted on any of the columns, e.g. the Name column
- Click the **Customize link** for the Standard Role you are interested in using, e.g. Sales Person

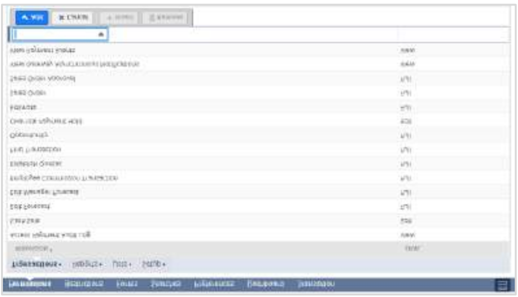
Customize a Role

Select the appropriate standard role and customize the Custom Role page displays:

- Rename the role using your company prefix, e.g. ABC: Sales Person



- Review **General and Authentication** sections
  - Review **Employee Restrictions** and define
  - Open fields for viewing and assigning
  - Review optional **Authentication** fields and Field Help
- Assign **Permissions** (Layer 1)
  - Which records can the role see and with what level of access (None – remove the element, View, Create, Edit, Full)



- Review **Employee Restrictions** (Layer 2)
  - These controls are applied over level 1
  - Includes departments, class, location and subsidiaries.

- Set it to either “none - default to own”, “own, subordinate, and unassigned” or “own and subordinates only” and then you can check the box the “Allow Viewing” box.
- Permission Open Field check boxes:
  - These determine restrictions, such as do not restrict record viewing and do not restrict list of values.
- **Forms:** assign various forms to the role
  - Tailor the level of access you want to give to users
  - Control the entry and transaction forms they use to enter data.
- **Restrictions:** Set department, class and location restrictions; new record name will display, e.g. Warehouse if renamed.
- Administrator can also set preferences by role. The preferences set for a role serve as the defaults for any users who log in with that role.
- Support of translation of custom role names**,** in accounts where the Multi-Language feature is enabled, is available.

Customize Role: Other Subtabs

Spend some time getting familiar with the other subtabs on a role:

- **Searches**: set default searches to be used by users with this role
- **Preferences:** Administrators can set preferences to the needs of a role; preferences are also available under User Preferences
  - The following chart compares the different preference levels (This is available in Help)

Preference Type	Applies To	Set By	Set On	For details, see
User	Current user only	User	*Home > Set Preferences* page	Setting Personal Preferences
Role	Users logging in with the role	Account Administrator	Role record, Preferences subtab	Setting Role-Based Preferences
Subsidiary (OneWorld only)	Users assigned to the subsidiary	Account Administrator	Subsidiary record, Preferences subtab	Editing Subsidiary Records
Company	All users in the account	Account Administrator	*Setup > Company > Preferences > General Preferences* page	Setting Company Preferences

- **Dashboard:** select a published dashboard to assign to all users with this role
- **Translation**: works with the multi-language feature; translate custom role names

Walkthrough: Assign a Role and Global Permissions

Assign a Role to an Employee

Enable Global Permissions Feature

Define Global Permissions on Employee Record

Use Case/Scenario: NetSuite recommends using custom roles, which are created by selecting a standard role and then customize it.

Assign a Role to an Employee

Edit **the** Employee Records:

- Navigate to **Lists > Employees > Employees** and select **Edit** for the employee
- Go to the **Access** subtab, **Roles** sublist
- Select each **Role** and **Add**

Global Permissions Overview

Administrator assigns employees' permissions that apply to all their assigned roles:

- User must have one or more roles assigned – **Access** subtab, **Roles** sublist
- These can be useful for temporary or unique permissions, but use with caution.

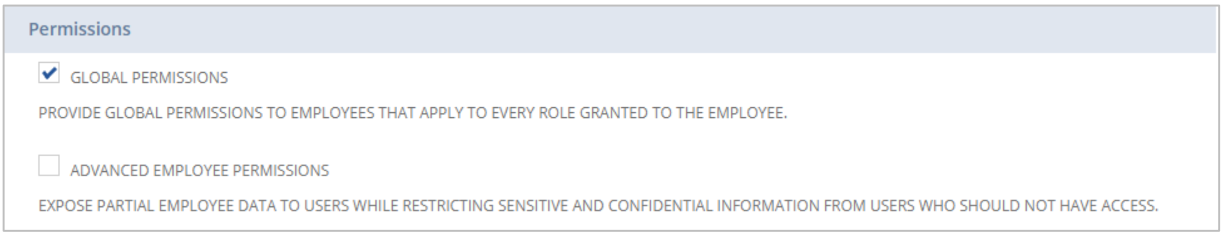
Useful to handle exceptions; e.g., cover daily responsibilities when person is on leave.

- They are employee specific permissions and override the role permissions.
    - E.g.: An AP clerk role can print checks. You hire a temporary AP assistant, but you want the assistant only to be able to view checks. This is when you use global permissions to assign temporary permissions.
    - *OneWorld*: An AP clerk works in different subsidiaries; a different role for each subsidiary. Due to some nuance in the roles or the subsidiary, you would use global permissions to execute those differences.

Enable Global Permissions

Setup > Company > Enable Features > Employees subtab, **Permissions** section:

- Select **Global Permissions**

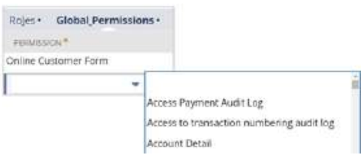


- Review field help for **Advanced Employee Permissions** and refer to the **Help Topic: Advanced Employee Permissions:**
    - This gives administrators more flexibility and control over what employee information certain roles can access in NetSuite

Define Global Permissions on an Employee Record

Edit an Employee record; go to the **Access** subtab, **Global Permissions** sublist:

- Go to the **Access** subtab, **Global Permissions** sublist
- Add **Permissions** and define the **Level**
    - Overrides role permission levels
    - There are no defined Layer 2, 3, 4 control levels



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Walkthrough: Additional Administrator Tasks

Test Custom Role

Use Administrator Tips

Use Case/Scenario: Administrators need to complete additional tasks after working with roles:

- Test any custom role
- Use some tips and tricks

Test Custom Role

Sign on as the Administrator:

- Go to the function and copy the URL from the function
  - For Example: Transactions > Sales > Enter Sales Order

Change Role to the custom role that is being tested:

- Paste the same URL in your browser; review the error message

Administrator Tips

Administrators can better serve their users:

- Assign each role, being used, to yourself:
  - Test the role
  - View NetSuite in the user's view
- When assisting a user, direct them to the classic interface:
  - This is a familiar view to the administrator
  - User navigates to **Home > Set Preferences > Appearance**
- Ensure that any role that needs to see Customer or Vendor transactional information has the following Permission enabled:
  - **Edit** the role
  - Go to the **Permissions** subtab and the **Lists** sublist
  - Add the **Financial History** permission to view; allows viewing transactions related to the entity

Walkthrough: Add an Employee

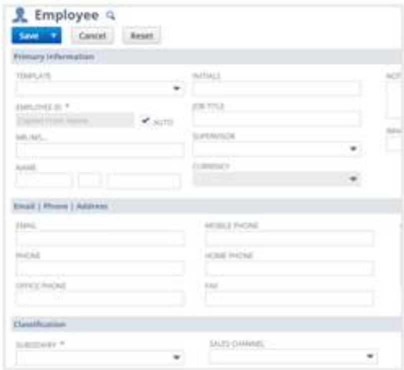
Enter a New Employee and Define Access

Use Case/Scenario: All employees need to be entered in the NetSuite account and their access must be controlled and defined.

Enter a New Employee

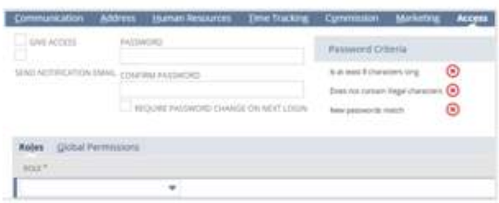
Navigate to a form to enter in a new employee record:

- Go to **Lists > Employees > Employees > New**



- Complete required and optional fields in the different field groupings, such as:
  - Primary Information
  - Email | Phone | Address
  - Classification

Define Access
Navigate to the **Access** subtab:



- Click **Give Access** when you are ready to have this user login
- Select **Send Notification Email**
- Provide the **Password** and **Confirm Password;** review the **Password Criteria**
- Select **Password Change on Nest Login**
- **Add** each required **Role**
  - An employee may have multiple roles; this does not affect your license count

OneWorld: Employees, Roles and Subsidiaries

All employees/ users have roles:

- By default, standard roles have no subsidiaries attached to them
    - Defining the subsidiary (subsidiaries) is optional and if used then the users can only see data in subsidiaries associated with the role

Assigning an employee to a subsidiary does the following:

- Determines the currency of their direct transactions (i.e. Commissions, expense reports, salary)
- Restricts the Employee to accessing data only associated with this subsidiary
- If the assigned role (s) do not have subsidiary restrictions, NetSuite reverts to employee record to determine their subsidiary restrictions

OneWorld: Employee Access to Multiple Subsidiaries

All employees/ users have roles. By default, standard roles have no subsidiaries attached to them. Defining the subsidiary (subsidiaries) is optional and if used then the users can only see data in subsidiaries associated with the role

Assigning an employee to a subsidiary does the following:

- Determines the currency of their direct transactions (i.e. Commissions, expense reports, salary)
- Restricts the Employee to accessing data only associated with this subsidiary
- If the assigned role (s) do not have subsidiary restrictions, NetSuite reverts to employee record to determine their subsidiary restrictions

To give an employee access to multiple subsidiaries:

- Configure a role and associate it to multiple subsidiaries
- Grant this role to the employee (gives the employee access to the multiple subsidiaries)
- Level of access is restricted by Permissions and level of access associated with that Role

Walkthrough: Login Audits

View and Use Login Audit Trail

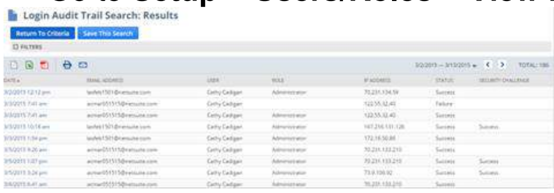
Review My Login Audit Portlet

Use Case/Scenario: The administrator can audit all user activity in the account. Individual users can audit their login activity.

Login Audit Trail

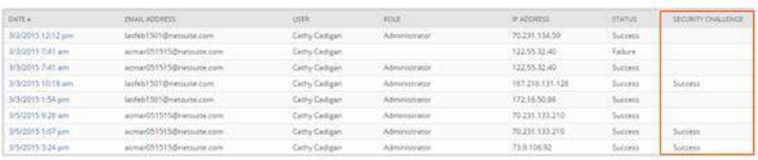
View Login Audit Trail provides a specialized search tracking user activity in the account; information is pulled from system notes:

- Go to **Setup > Users/Roles > View Login Audit Trail** and define search criteria



- View the **Login Audit Trail Search: Results**
    - Drill into results
    - Export results
    - ***Note***: If you receive no results, this indicates that the user was logged into NetSuite, but did not “create” nor “edit” any records
- Results: view the success of each login attempt and **Security Challenge** column

Security Challenge



DATE	EMAIL ADDRESS	USER	ROLE	IP ADDRESS	STATUS	SECURITY CHALLENGE
3/2/2015 12:12 pm	lasfeb1501@netsuite.com	Cathy Cadigan	Administrator	70.231.134.59	Success	
3/3/2015 7:41 am	acmar051515@netsuite.com	Cathy Cadigan		122.55.32.40	Failure	
3/3/2015 7:41 am	acmar051515@netsuite.com	Cathy Cadigan	Administrator	122.55.32.40	Success	
3/3/2015 10:18 am	lasfeb1501@netsuite.com	Cathy Cadigan	Administrator	167.218.131.128	Success	Success
3/3/2015 1:54 pm	lasfeb1501@netsuite.com	Cathy Cadigan	Administrator	172.16.50.86	Success	
3/5/2015 9:20 am	acmar051515@netsuite.com	Cathy Cadigan	Administrator	70.231.133.210	Success	
3/5/2015 1:07 pm	acmar051515@netsuite.com	Cathy Cadigan	Administrator	70.231.133.210	Success	Success
3/5/2015 3:24 pm	acmar051515@netsuite.com	Cathy Cadigan	Administrator	73.9.106.92	Success	Success

The **Login Audit Trail Search: Results** displays a column for **Security Challenge:**

Security Challenge: an instance when a user is prompted to answer a security question in order to login and is triggered by any of the following:

- User attempts to use a new browser or computer
- User forgets their NetSuite password
- Or, if it has been more than 90 days since the user’s last login
- If this column does not display either Success or Failure for a row, it means no security challenge occurred for that login
- Assists administrators in detecting hacking attempts, which can be evidenced by a high number of failures in a short period
- Possible outcomes: Correct login = Success; 6 consecutive wrong logins = Failure

My Login Audit Portlet

Personalize the Home Dashboard; add My Login Audit portlet to monitor the usage and security of your login:

- Setup the portlet to meet your needs; review each subtab and associated settings:
  - **Last Login**
  - **Successful Logins**
  - **Login Failures**
  - **Password Updates**
  - **Mobile Devices**
  - **Web Services**

Best Practices:

- **Do not assign** Standard Roles to users; they almost never meet the "least privileges" standard, for a given function
- Use NetSuite Roles as templates to copy; rename Custom Roles with your company's prefix
- Always weigh and evaluate reasons for assigning a user multiple roles or providing a single custom role:
  - It may be easier for the user to only have one role
- Design and test new and custom roles before assigning to users:
  - Verify the user/role has all Permissions and access to necessary data from beginning-to-end of a process
- Assign new and custom roles before a new user starts accessing the account:
  - Do not rename a former employee to a new employee;
  - The new employee would inherit all records of former employee
- When an employee leaves immediately remove their access to NetSuite:
  - Mark them inactive, also you can remove roles and global permissions
  - ***Why is this so important?***

Now It's Your Turn

01: Rename Roles with Your Company's Prefix

02: Customize a Sales Manager Role

03: Show Role Differences

04: Customize a Sales Administrator Role *OneWorld*

05: Add a NetSuite User

06: View the Login Audit Trail

Use Case/Scenario:

- Learn to work with custom roles
- Add a user
- Audit activity
- Allow 30 – 45 minutes

Exercise 01: Rename Roles with Your Company's Prefix

Time: 3-5 minutes

Scenario: As a best practice, rename all the standard roles with your company's prefix. Use these renamed roles to provide the roles you need for your organization, protecting the standard template roles provided by NetSuite.

In this exercise:

- Rename roles with the CC prefix

1. Navigate to **Setup > Users/Roles > Manage Roles.**
2. Click **Customize** next to the **Employee Center** role.
3. In the **Name Field** enter **CC: Employee Center**.
4. Click **Save.**
5. Click **Customize** next to the **Sales Manager** role.
6. In the **Name Field** enter **CC: Sales Manager**
7. Click **Save**
8. On the list of roles, sort on role names; your custom roles should be grouped together
9. If you are not on the list of roles, then navigate to **Setup > Users/Roles > Manage Roles.**
10. How are these roles identified on the list of roles?
    a. Answer:
11. Do the original, NetSuite Standard roles still exist?
    a. Answer:
12. How can you identify a NetSuite Standard role?
    a. Answer:
13. **End.**

Exercise 02: Customize the Sales Manager Role

Time: 5-10 minutes

Scenario: Your Company has some specific requirements for your Sales Manager.

In this exercise:

- Edit the CC: Sales Manager role to meet the Company's requirements.
- Add and assign this role to yourself – Cathy Cadigan (Administrator)
- Sign in with this role and test that the modified (CC: Sales Manager) role has the correct permissions associated with it.

Examine the default values associated with the CC: Sales Manager Role

- We start from the standard sales manager role and pare it down to meet your company's requirements.
- As we are looking at the few examples that follow please use this thought process to apply to all areas of the roles' responsibilities.

1. Navigate to **Setup > Users/Roles > Manage Roles.**
2. Click the **Edit** link next to the CC: Sales Manager role.
3. Do you want your Sales Manager to just see his, his subordinates and unassigned transactions?
   a. If so, choose "own, subordinate and unassigned" on the dropdown list next to **Employee Restrictions.**
4. Do you want to allow other users to view records assigned to others but not edit them?
   a. If so, check the box next to "**Allow Viewing**."
5. Navigate to the **Permissions** subtab and then the **Transactions** sublist; some of the questions you need to ask for this role:
6. Does your Sales Manager need to approve Sales Orders, but not delete sales orders? If so, under the **Permissions** subtab, **Transactions** sublist, click on the **Sales Order Approval** record, select **Edit** from the Level dropdown list.
7. **Click OK.**
8. Does your Sales Manager need to see Purchase Orders? If yes, under **Permissions** subtab, **Transaction**s sublist; from the Permissions dropdown list select **Purchase Order** and set the Level to **View.**
9. Click **Add.**

10 Does your Sales Manager need to access Customer Payments? If so, what level? **Permissions** subtab, **Transactions** sublist, from the Permissions dropdown list select **Customer Payment** and set the Level to **View.**

11 Click **Add.**

12 Does your Sales Manager need to access Credit Memos? If yes, **Permissions** subtab, **Transactions** sublist, add the **Credit Memo** Permission and set the Level to **View.**

13 Click **Add.**

14 Does your Sales Manager need to be able to export lists from NetSuite (i.e. customer list)? If not, **Permission**s subtab, **Lists** sublist, select the **Export Lists** record, and then click **Remove** button.

15 Click **OK**. (Note: this list is in alphabetical order, the "export lists" permission is midway in the list.)

16 Does the Sales Manager need to see the Financial Reports? If not, **Permissions** subtab, **Reports** sublist and make sure that Financial Statements is not there, if it is remove it!

17 Does the Sales Manager need to see the Financial History? If yes, **Permissions** subtab, **Lists** sublist and add **Financial History** permission with **View** level.

18 Click **Add.**

19 Click **Save.**

Test the Role

20 Add this role to your Login or whichever login name is at top-right of page; go to **Lists > Employees > Employees**

21 Pick the person you are logged in as, named at the top-right of the page (e.g. Cathy Cadigan, Ed Baumann)

a. Click **Edit** and navigate to the **Acces**s subtab.

b. Go a blank line and from the **Roles** dropdown list select **CC: Sales Manager Role** from the list.

c. Click on **Add**. You should have both the **Administrator** and **CC: Sales Manager Role**.

22 Click **Save**

Change Roles

23 Go to top-right hand side of your page and switch roles to the CC: Sales Manager.

a. *Note: If Change Role does not display in the upper-right hand corner of your page, please log out of NetSuite and log back in.

b. Select Administrator as the Default Role, on the **View All Roles** page and then click on CC: Sales Manager role to enter as the CC: Sales Manager.

24 If prompted, use the **Set Up Security Questions** pop-up window displays:

a. Select **three security questions** of your choice

b. Uncheck **Hide Answers**

c. As your **Answer,** enter the **last word of each question**; for example:

i. **Question:** What was your childhood **nickname**

ii. **Answer**: nickname

25 Click **Save** and click **Close** in the **Security Questions Complete** pop-up window

26 Test that you can see all items you gave permissions for and test that you can't see financial reports.

27 Is there a **Setup** tab? What are some of the menu listings under this role's setup tab?

a. **Answer**:

b. Why?

28 **End.**

Exercise 03: Show Role Differences

Time: 3-5 minutes

Scenario: To familiarize yourself with roles, compare permissions between two roles: 1) Sales Manager and 2) Sales Rep

1. Change back to **Administrator** role, if necessary.
2. Navigate to **Setup > Users/Roles > Show Role Differences**
3. Ensure that the **Only Show Differences** box is checked, top right-hand side of the page.
4. Click in the **Base Role** field.
5. From the **Base Role** dropdown list, select the **Sales Manager** role.
6. In the **Compare To** field, from the **Compare To** dropdown list, select any other Sales role in the account.
7. Click the **Show** button.
8. What are the differences between these roles? Just make note of some of the differences in Lists, Reports, Transactions, and Setup
9. End.

Exercise 04: Customize a Sales Administrator Role *OneWorld*

Time: 3-5 minutes

Scenario: The Chatham Company's Sales Administrator will work in multiple subsidiaries. In this exercise:

- Create and work with a customized Sales Administrator role to assign to employees in different subsidiaries

1. Navigate to **Setup > Users/Roles > Manage Roles**.
2. Click **Customize** next to the Sales **Administrator** role.
3. In the **Name** field enter **CC: Sales Administrator**.
4. Click **Save.**
    a. **Note:** We did not choose a subsidiary when we customized this role.

Assign employee record to a subsidiary

5. Now **Add** the role to your Login (or whichever login name is at the top-right of page) and assign your employee record to the Germany subsidiary.
6. **Lists > Employees > Employees**
7. Pick the person you are logged in as, named at the top-right of the page (e.g. Cathy Cadigan, Ed Baumann).
    a. Click the **Edit** link
    b. **Subsidiary = Germany**
    c. Go to the **Access** subtab
    d. Add the role for **CC: Sales Administrator**
8. Click **Save.**
9. Navigate to **Change Role** in the upper-right hand corner of your page.
    a. If Change Role does not display in the upper-right hand corner of your page, please log out of NetSuite and log back in.
10. Enter NetSuite as the **CC: Sales Administrator**.
11. If prompted Set Up Security Questions: Select three security questions of your choice and uncheck Hide Answers. As your Answer, enter the last word of each question; for example:
    a. Question: What was your childhood nickname
    b. Answer: nickname

12 Click **Save** and click **Close** in the **Security Questions Complete** pop-up window.

13 Navigate to **Home > Set Preferences > Restrict View** tab.

14 Which subsidiaries are listed in the Subsidiary pick list? (Subsidiary is under the Restrict View tab.)

   a. Answer:

Modify the role to restrict to specific subsidiaries

15 Modify the **CC: Sales Administrator** role so that only German and Italian employees can use this role.

   a. Navigate to **Change Role** in the upper-right hand corner of the page.

   b. Enter NetSuite as the **Chatham Company-Administrator**.

16 Navigate **to Setup > Users/Roles > Manage Roles**.

17 Click the **Edit** link next to the CC: Sales Administrator role.

18 Hold down the **Ctrl** key and select **Parent Company: Germany** and **Parent Company: Germany: Italy** in the **Subsidiary** field.

19 Click **Save**.

   a. Note: We are NOT modifying the employee record: the employee is still assigned to the Germany subsidiary.

20 Navigate back to **Change Role** and switch to **CC: Sales Administrator**. If you do not see it, you may need to log out and back in.

21 Navigate to **Home > Set Preferences > Restrict** View tab.

22 Which subsidiaries are listed in the **Subsidiary** pick list?

   a. Answer:

23 Navigate to **Change Role** in the upper-right hand corner of your page.

   a. Enter NetSuite as the Administrator.

24 If prompted Set Up Security Questions: Select three security questions of your choice and uncheck **Hide Answers**. As your Answer, enter the last word of each question; for example:

   a. **Question**: What was your childhood nickname

   b. **Answer**: nickname

25 Navigate to **Lists > Employees > Employees**.

26 Select your employee record (Cathy Cadigan). Click **Edit**.

27 In the **Classification** section, change the value in the **Subsidiary** field back to **Parent Company**.

28 Click **Save.**

29 End.

Exercise 05: Add a NetSuite User

Time: 2-5 minutes

Scenario: Administrators are responsible for entering new users and assigning roles. In this exercise, you:

- Enter a NetSuite User
- Assign a role

1 Confirm that you are in the Administrator role.

2 Navigate to **Lists > Employees > Employees > New**.

3 Confirm that you are using the **Employee** form.

4 Enter the required information:

   a. Enter employee's name in the Name fields. The employee's name is **Joe S TEST.**

   b. In the **Job Title** field, enter Sales Manager

   c. Review field help for the **Email** field, but do not enter an email now.

   d. **Subsidiary** is **Parent Company**

Assign Roles

5 Click the **Access** subtab.

   a. Review the **Give Access** box, <u>but do not check</u> yet. When this employee starts work, you can check the box.

   b. In the **Password** field, enter My_old_dog34 as the password and reconfirm the password to test the password strength.

   c. Review the Password Strength.

6 From the **Role** dropdown list, select the **CC: Sales Manager**

7 Click the **Add** button.

8 Click the **Save** button.

9 Review the **Confirmation** message 

10 End.

Exercise 06: View the Login Audit Trail

Time: 2-5 minutes

Scenario: NetSuite tracks when each user logs in, as well as transactions entered during that time. For example, an employee tells you that several of his records were changed on a day that he did not log in to NetSuite.

In this exercise:

- Practice viewing the user's login trail to see when this employee has logged in.

1. Navigate to **Setup > Users/Roles > View Login Audit Trail**.
2. If necessary, **uncheck the Use Advanced Search box.**
3. Leave **any** of as the **User filter,** select – **Mine -** from the dropdown list. (There maybe transaction changes available. If you select an employee that you have just entered, there are probably not any transactions to view.)
4. From the **Date** dropdown, select **within.**
5. Click in the next field to see your options; set the **Quick Filters** to **Month.**
    - **a.** Now scroll down and select **this month.**
6. Click the **Submit** button**.**
7. The **Login Audit Trail Search Results** lists all the dates and times when the user logged in.
8. Review the **Status** and **Security Challenge** columns**.**
9. Click any Date/Time links to view a user activity.
    - a. **Note:** if there are no results, it means the user was logged in but did not edit or create records.
10. When you are done, click the **Home** tab.

11. End.

Solution for Exercise 01: Rename Custom Roles with Your Company's Prefix

How are these roles identified on the list of roles?

- **Answer:** They have the prefix CC

Do the original, NetSuite Standard roles still exist?

- Answer: Yes

How can you identify a NetSuite Standard role?

- **Answer**: Standard Roles have a Customize link.

Solution for Exercise 02: Customize the CC: Sales Manager Role

Is there a **Setup** tab? What are some of the menu listings under this role's setup tab?

- **Answer**: Sales & Marketing Automation, Customization, Other Setup
- **Why?** Different permissions.

Solution for Exercise 04: Customize a Sales Administrator Role for OneWorld

Which subsidiaries are listed in the Subsidiary pick list? (Subsidiary is under the Restrict View tab.)

- **Answer:** Only Germany, since the Employee record is tied to Germany.

Which subsidiaries are listed in the Subsidiary pick list?

Answer: since these subsidiaries were identified on the role record. The role governs subsidiary access; we defined the role to be in Germany and Italy.

Activity: Match Game

Match the terms on the left to the task/description on the right

1. Permission	A. Controls navigation paths
2. Restrictions	B. Anybody with access to your NetSuite account
3. Center	C. Modify the permissions
4. User	D. Used to define a role with different levels of access such as: view, create, edit, and full

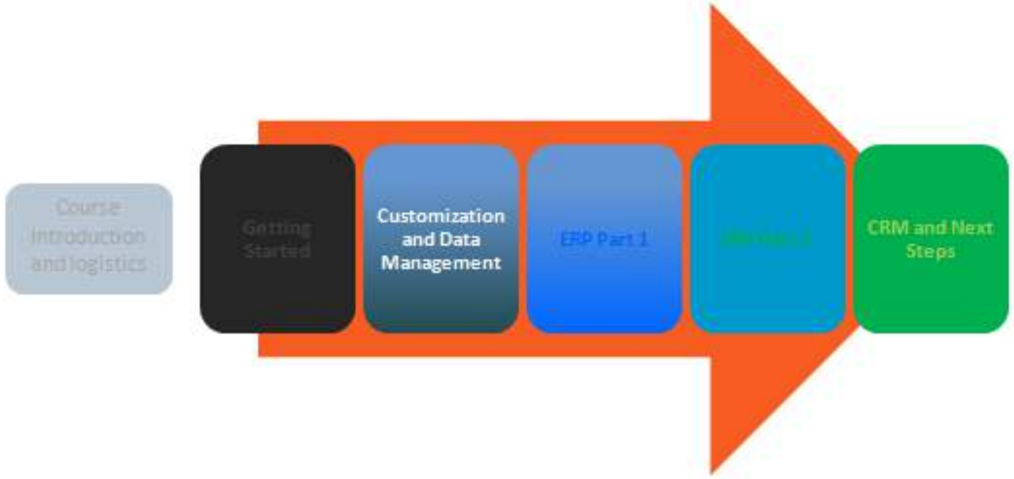
Need More Information

NetSuite Help Center:
- Account Setup: Managing Roles & Permissions

SuiteAnswers Learning Center: Training Videos
- New Feature Training
- Training Webinars

View the following video, access from the demo account, NetSuite Essentials tab:
- **Getting Started Video**: Day 1 - Getting Started: Data Security

Getting Started is done, next is Customization and Data Management



This is the end of this book