NetSuite Access and Navigation

Quick Reference Guide

Navigating the Quick Reference Guide

There are **several ways** to navigate this Quick Reference Guide (QRG):

1) Click the link in the Table of Contents.
2) For PDF formats:
    a. Open the page thumbnail or bookmarks panel.
    b. Expand bookmarked headings as needed.
    c. Click a page thumbnail or bookmarked document heading.
3) For Microsoft Word formats:
    a. Click the View tab and select Navigation Pane (in the Show group).
    b. Expand the headings as needed.
    c. Click an area of interest.

Note: Your NetSuite interface may differ from the instructions provided, but the tools and concepts in this document are applicable in your environment.

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Log In to NetSuite

Log In

Steps

1) Open an Internet Browser (Mozilla Firefox, Google Chrome, or Internet Explorer).
2) Enter **http://www.netsuite.com** into the address bar.
3) Enter your **Email Address** and **Password**.

   Note: Passwords must be changed every 90 days.

4) Click **[Log In].**

Change Password

Steps

1) Locate the **Settings** Portlet on the Home dashboard. Click the **Change Password** link.
2) Enter your **Old Password**.

   Note: Enter the assigned temporary password here when you are prompted to change into your personal password.

3) Enter a New Password.

   Note: The **New Password** must meet the requirements for length and complexity as described on the right.

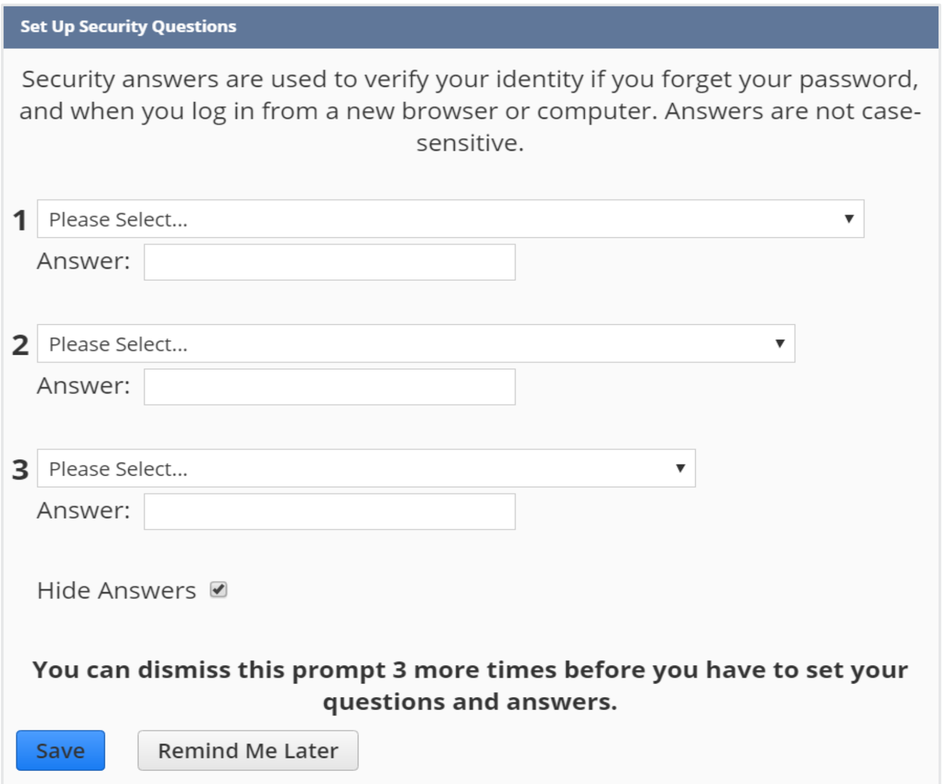
4) Confirm the password.
5) Click **[Save]**.

Set Up Security Questions

Upon the first login you will be prompted to set up security questions. This is a requirement for resetting the account password. As a validation measure, you will be prompted to answer one of these questions whenever you log in via a new device or browser.

Steps

1) A pop-up box to **Set Up Security Questions** will appear.



2) Select questions from the predefined list and provide an answer for each.

Notes:
- Unselect the Hide Answers to prevent unintentional typos while you fill these out.
- Answers are not case-sensitive.

3) Click **[Save]**.

Manage Roles and Access

View Roles and Set Default Role

Steps

1) Hover over your user name in the upper right corner of the screen. Select **View My Roles**.
2) On the **My Roles** page, click the 3 dots sign on the default role of your choice and choose Make Default.

Review Permission Levels

Roles are designed to optimize a job function by controlling the level of access to records and information.

Steps

1) Navigate to **Setup > User/Roles > Manage Roles.**
2) On the Manage Roles page, **Edit** or **Customize** a role.
3) Navigate to **Permissions > Transactions** subtab and select a Level for a permission:
    - **View** access allows you to see and search for a record, but not to create or change its information.
    - **Create** permission allows you to view and create new records.
    - **Edit** access allows you to view, create, and change an individual record.
    - **Full** access allows you to view, create, edit, and delete a record.

Compare Roles and Centers

Each role is associated to a particular set of menus called a Center.

Steps

1) Log into your Employee Center role.
2) Review the Center tabs available in your current role.
3) Hover over your username in the upper right corner of the screen and select a different role.
4) Notice that the focus of menus changes to optimize the main tasks assigned to a specific role.

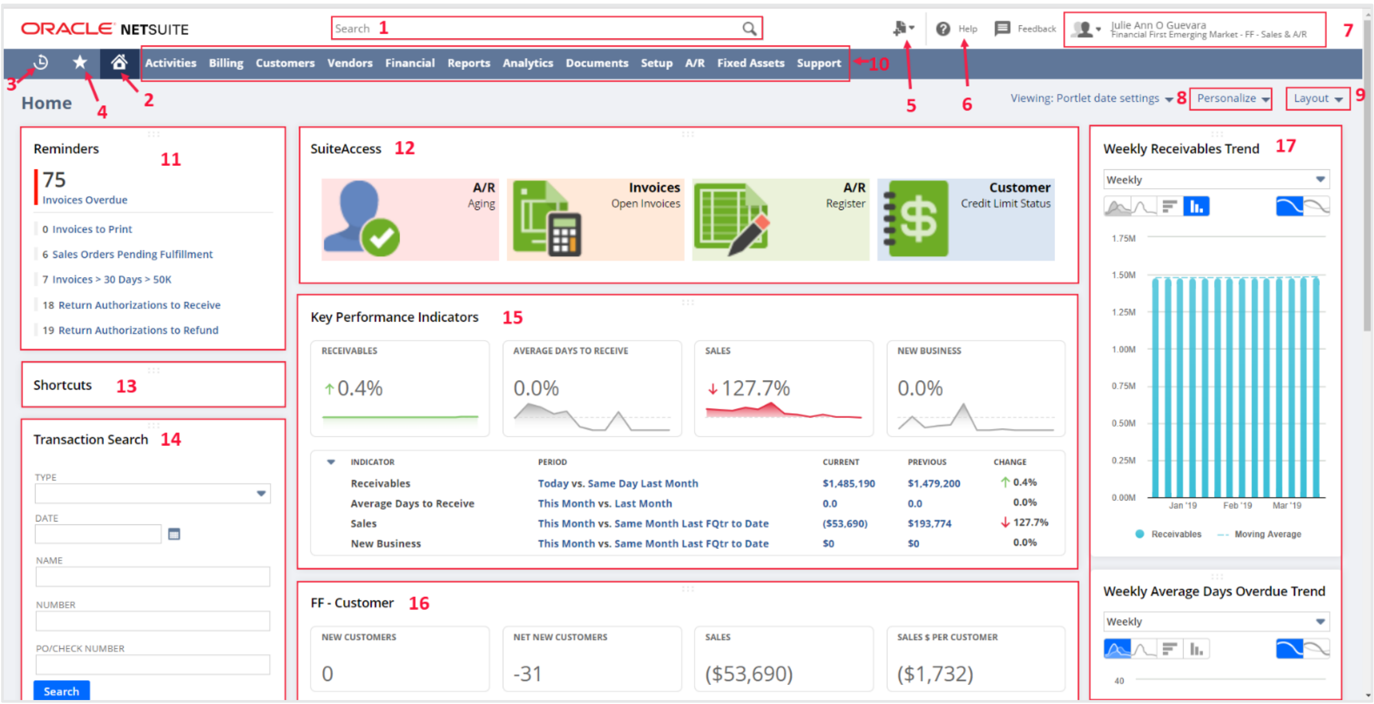
   Below is a summary of centers and its corresponding roles:

Center	Standard Roles
Accounting Center	A/P Clerk, A/R Clerk, Accountant, Accountant (Reviewer), Bookkeeper, CFO, Payroll Manager, Revenue Accountant, Revenue Manager
Classic Center	Administrator, Full Access, Payroll Setup
E-Commerce Management Center	Store Manager, Intranet Manager
Engineering	Engineer, Engineering Manager, Issue Administrator, QA Engineer, QA Manage
Executive Center	CEO, CEO (Hands Off)
Marketing Center	Marketing Administrator, Marketing Manager, Marketing Assistant
Project Center	Consultant
Sales Center	Sales Administrator, Sales Manager, Sales Person
Shipping Center	Warehouse Manager
Support Center	PM Manager, Product Manager, Support Administrator, Support Manager, Support Person
System Administrator	System Administrator

Navigate Dashboard and Portlets

Review Dashboard Key Elements

Your Home Dashboard is your landing page in NetSuite. It is already pre-configured with elements and portlets which help you to perform your day-to-day tasks.



The following table describes the elements available on your Home Dashboard:

Element	Description
1) Global Search	Search for records using search terms, wildcards, and record prefixes.
2) Home Icon	Click to return to the Home Dashboard at any time.
3) Recent Records	Displays up to the 12 most recently viewed records. Only individual records appear in this list. Searches, reports, and lists DO NOT display in this menu. *Note:* Avoid using the browser Back button. Screens do not automatically refresh.
4) Shortcut Menu	Add shortcuts for easy access to most frequently used records, transactions, lists, and/or reports.

5) Create New menu	Use this for quick record creation. *Note*: Click **Personalize** to add, remove, and move items on the bar.
6) Help Center	Browse or search for information, download user manuals, and access SuiteAnswers.
7) Change Roles	Users assigned to multiple roles can quickly switch between roles by clicking **Role.**
8) Personalize	Click to open the **Personalize Dashboard** interface to find portlets to add into the dashboard.
9) Layout	Choose from two-column, three-column, or single-column formats. *Note*: Select your layout before adding or rearranging portlets.
10) Center-Menus	Each role comes along with one Center and each Center tab unfolds into the respective menu.
11-17) Portlets	These are windows which display dynamic data and important information in NetSuite.

Review Portlet Types

The following content is available for the dashboard portlets:

Type	Description
11) Reminders	Shows important tasks of selected types, usually that are past due or soon due to be completed.
12) Custom Tiles	Provides easy access links to important reports and tasks of the current role.
13) Shortcuts	Shows links to selected pages, so you can navigate quickly to frequently used pages.
14) Quick Search	Shows a form where you can quickly search for records of a selected type, using one selected filter field and entered keywords.
15) Key Performance Indicators (KPI)	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. You can define up to four KPIs as headlines.
16) KPI Scorecard	Shows a performance scorecard with comparisons of selected key performance indicator (KPI) data.
17) Trend Graphs	Shows up to three Key Performance Indicators (KPIs) in a single chart with time-based X axis.

Note: Refer to the Help Center: Portlet Types Table for more information.

Personalize Portlets

One leading practice is to add the following portlets to your Home Dashboard:

- Activities, Calendar, and Phone Calls
- Reminders
- Tasks
- Shortcuts
- Quick Search
- Key Performance Indicators

Steps to Add a Portlet

1) Click **Personalize** on the Home Dashboard.
2) The **Personalize Dashboard** window displays a number of portlets arranged into categories. Under the **Standard Content** tab, click to view the range of portlets.
3) Select a portlet.
4) On your recently added portlet, hover your cursor over the right corner of the header bar to display the menu .
5) Select **Set Up**. A settings window displays.

Note: Access to **Set Up** and the options available for setup will vary depending on the portlet type.

6) Click **[Save]**.

Note: Click to display the most recent information within the portlet. Closing and reopening your browser will not automatically refresh your portlets.

Steps to Remove a Portlet

1) Hover over the right corner of the header bar to display the menu ⋮ .
2) Click **Remove**.

Steps to Rearrange a Portlet

1) Click and hold the portlet header.

Notes:

- Click the header bar once to collapse a portlet. Click the header again to expand it.
- Collapse the portlet before rearranging it.

2) Drag-and-drop the portlet to the preferred dashboard location.

Locate Help Resources

Access the Help Center

The Help Center is context-specific, providing information based on the page you are currently viewing.

Steps

1) On the **Home Dashboard**, click the ? Help at the top of the screen.
2) On the **Help Center** page, you can:
   - Enter a topic in the **Search** bar
   - Browse the **Table of Contents**
   - Download **User Guides**
   - Locate **SuiteApps** information
   - Navigate to and learn more about NetSuite **Training**
   - Access **SuiteAnswers**

View SuiteAnswers

Steps

1) Navigate to **Support > Go To SuiteAnswers.**
2) On the **SuiteAnswers** page, enter a topic in the **Enter your keywords** search engine.
3) On the **Results Overview** page, you can:
   - Select a help resource from the list of results
   - Read related **Support Articles**
   - View **Training Videos**
   - Access **Help Topic** information
   - **[Contact Support]**

Use Field Help

Steps

1) On a record or form, click the name of any field.

Note: All standard fields in NetSuite give you filed level help.

2) A pop-up box displays describing the purpose of the field and provides instructions for how to fill in the field.

View Performance Details

Steps

1) Double click the NetSuite logo on the application interface.
2) The **Performance Details** window displays the response times in each part of the network path.
3) Click **[OK]**.

View Status Page

Steps

1) Enter **status.netsuite.com** in the address bar.
2) On the **NetSuite Status** page, you can see the system wide up-time statistics, alerts, and recent posts on the past seven days.