NetSuite log in ,Navigate and Find help:

You need to answer the security questions when you log in from another device. You need to answer the security questions when you log in from another device.

Manging roles and access

User is a role who has access to a NetSuite accounts

A role is a defined access configuration that includes a set of associated permissions and can be assigned to users.

Navigate NetSuite Roles.

Roles are configured and assigned to users who perform similar functions in the organization. Each role includes a set of associated permissions that determine which information you can view, create, and edit, and which tasks you can perform in NetSuite.

If you have more than one role, you can select a default role to log in. You can switch among different roles and accounts using the Roles list.

Production

Sandbox

Development

Release preview.

Compare permissions and centers.

Permissions are divided into different access level.

View - just to view.

Create - creating new files.

Edit - access allows you to view, create, and change record information.

Full - access allows you to view, create, change, and delete records.

In NetSuite, each role is associated with a specific menu configuration called a centre.

Centres are tailored to the business needs of a business in a specific functional area, such as accounting or sales.

When you log in to NetSuite, the centre configuration of a role determines the pages that you view and optimizes user efficiency by quickly accessing the necessary information and tasks.

Navigate dashboards and portlets Overview

The home page, also called a **dashboard**, is a collection of real-time data relevant to the role of the user viewing the page.

Dashboard content is displayed in a variety of **portlets**, which are dynamic data display windows. Some portlets provide direct access to raw data.

Other portlets display data synthesized into critical business metrics, such as key

performance indicators (KPIs), performance scorecards, trend graphs, and report snapshots.

When you personalize, you can add up to 10 Report Snapshots portlets and 1 KPI portlet.

1)Company profile:

Our company is a mid-market company using CRM and ERP . selling goods and services.

We are multi subsidiary company using a OneWorld account.

Our base currency is USD and we conduct business in Different currency.

We have been in business for about 7 years.

We do business with:

Customers both Domestic and foreign. Sales transactions are supported by multiple currency.

Includes B2B(Business to Business) and B2C(Business to Customer).

Approved customers get accessed to web based customer centre portal . This gives access to the costumer to view ,find and print their orders and invoices that they have placed. They might also have access to the credits, returns payment history and open support cases.

Vendors both Domestic and foreign. Purchase transactions are supported by multiple currency.

Purchase activity can include stock replenishment and drop shipments.

Approved vendors get accessed to web based vendor centre portal . This gives access to the vendor to view ,find and print their orders and invoices that you have placed. They might also have access to the credits, returns payment history and open support cases.

Partners help to generate sales and provide resell capabilities

Use to advanced partner centre may be considered in the future.

**2)Reasons for choosing NetSuite for the company:**

**NetSuite is Software as a Service(SaaS) Model.**

**A**pplication is Hosted all over the internet(log in from anywhere).

The account is configurable and customizable.

**NetSuite uses a relational database management structure(RDMS).**

which provides a single source of data connecting the business functional units together, delivering a single point of business.

uses data common to multiple tables to link them together, allows customizable business process and internal control capabilities.

it is the predominant choice in storing financial records, manufacturing, and logistical information, as well as personnel data.

**What are the benefits of a Relational Database?**

A Relational Database Management Structure incorporates many unique tables. It is defined with rows or unique lines of information. In this example, we are showing the following tables, Customer, Partner, Sales Rep, and Item. The tables are related to each other to form another table. In this example, a Transaction, these four pieces of information are displaced for one piece of information.

To review, you can locate the forms using the following menu paths,

 Customization>Forms>Entry Forms, or Customization>Forms>Transaction Forms.When you are viewing either list, a Filter is available at the top of the page.

**A business rule** is a constraint which is applied to a database, for example, before an order is fulfilled, the sales manager must approve it. Documenting business rules is essential for a good system design and deployment.

**business processes** can help an organization achieve goals, remove obstacles, reduce mistakes, improve communication, comply with laws, and increase  customers loyalty.

**3)Basic Navigation**

The Center is the grouping of tabs that a user will see across the top of their dashboard.

Beneath our Center is where we'll find what is referred to as the dashboard. This is a visual workspace where the user can most likely access the majority of the parts of NetSuite that they need in order to do their job.

On the dashboard, we have what's referred to as portlets, or windows.These are the square areas of information that you see here. So for example, we have a Reminders portlet.

What is the purpose of forms and records in NetSuite?

The form is the interface that is used to interview and modify data. The record is how that data is stored in the database. For example,customer datais entered into a customer form. When the form is saved, the customer record is created.

**4)Overview of account configuration and processes**

The Billing section and a payment processing, notice that both Electronic Funds Transfer (Deduct approved amounts from customers bank account)and ACH (using ach transactions to deposit approved amounts into your vendors bank account and to pay employee expense report) Vendor Payment  require agreements to terms of service. Credit cards payments.

Basic features on the Transactions subtab support Order to Cash, Purchasing, and Returns. The NetSuite Approvals workflow provides a sophisticated approval routing and includes the three way match Vendor Bill Approval.

**Order-to-cash:**

**Estimates:** *prepare Estimates or quotes to send to customers*

**Sales Orders:** *Track customer orders and covert to* invoices

**Purchase Orders:** *create and track vendors purchase order*

**Return Authorization/Vendor Return Authorization**: track customer returns using authorization numbers/ track Vendors returns using authorization numbers.

**Related enabled SuiteApp-NETSUITE enabled workflow:**

* *Sophisticated approval routing.*
* *Includes 3 way match vendor bill approval.*

**4)NetSuite Data Model:**

**NetSuite data tables:**

**Entity**: individuals and organizations that you do business with Entity table types can include leads, prospects customers, contacts, competitors, vendors, partners, and employees.

**Transaction:** A Transaction table type is an interaction, a process, with or between the entities.

**CRM:** Customer Relationship Management, tracks various activities with customers.

**Item:** Item table types are the record type for goods and services that you sell to customers and purchase from vendors.

**A subsidiary** *(sub) is a business entity or corporation that is fully owned or partially controlled by another company, termed as the parent, or holding, company. Ownership is determined by the percentage of shares held by the parent company, and that ownership stake must be at least 51%.*

*Instagram is a subsidiary of Facebook.*

*YouTube is a subsidiary of google.*

* *Customization allows for the modification of standard records and then the creation of custom records for unique business needs.*
* *Entity table types, customers, vendors, employees, and partners are types of Entity data. You may find a need for creating a hierarchy in your customer and partner records using parent/child relationships. You might wonder if there is a limit to parent/child relationships in NetSuite. It does not seem that we have any documented or coded limits. The limitation is more about usability or practicality.*
* *Transaction table types fundamentally involve the potential movement of money or a value adjustment. Bank transactions are recorded in NetSuite. And those might include writing checks, making deposits, transferring funds. We could have purchases with vendors. We could have purchasing, billing, and payment records*
* *Sales are various transactions with your customers and may include an opportunity, an estimate, sales order, invoice, or a cash sale. Employee transactions normally relate to expense reports, time reports, and payroll. And finally, inventory transactions involve adjustments to inventory, order items, bin put away, and transfer orders.*
* *CRM, or Customer Relationship Management, table types provide us with different records for tracking our interactions with customers. It gives us activities, different avenues, to use and record in our communication. Project tasks are part of the project management. Those provide for task definition, resource assignment, and Gantt charts. Should you use marketing within NetSuite, campaigns track your marketing efforts.*
* *Item table types accomplish two things. Number one, they link the transaction to the general ledger, based on defined account and segmentation on the Item record. And number two, they identify items that we buy, sell, and resell.(* *A general ledger is a record of all of a company's, and its subsidiaries', assets, liabilities, expenses, income and equities. General ledgers are generally broken down into records of accounts and account balances and financial transactions and from there, if necessary, into subledgers).*
* *how tables relate to each other in NetSuite. What kind of relationships can they have? There are four core methods for relating data together. One-to many,  we'd have one customer ordering multiple items. A many-to-one, where numerous students could be taking one course. A one-to-one relationship, where each computer might have a unique serial number. And finally, a many-to-many, multiple contacts or individuals can be shared by multiple companies.*

*8)item master*

* *When defining your item strategy, consider these best practices. The inventory costing method must be set up in advance of the item creation. If you sell software items, use the non-inventory item type. You can sell associated services as either non-inventory or service items. If you sell physical goods or products, set those up as inventory items. For physical inventory, consider the use of units of measure to provide greater flexibility and accuracy when tracking and selling inventory. And if you sell only software and/or services, use this feature if you are setting up statistical accounts to be used in your general ledger.*