SuiteSocial

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SuiteSocial

SuiteSocial is NetSuite's social collaboration tool that enables you to more tightly connect social interactions to your NetSuite data and track important changes to that data. With the interactive news feed, you can see updates posted by your colleagues, and be notified when relevant NetSuite records are created or edited. You can post your own messages or status, and access the records you are following.

With SuiteSocial, you can:

- Follow colleagues and NetSuite records like you would follow a person on Twitter or Facebook. Any updates posted by your colleagues, or any changes made to the record will be visible in your news feed.
- Get real-time updates on key business events.
- Get social collaboration features natively in NetSuite.
- Change your user interface language.

> **ⓘ Note:** SuiteSocial is a SuiteApp that is built on the SuiteCloud platform—made up primarily of custom records and client/server SuiteScripts.

Setting Up SuiteSocial

If you are a NetSuite administrator, you must configure SuiteSocial before granting users access to the SuiteApp.

To configure SuiteSocial to work according to your company's business needs, complete the following procedures:

- Prerequisites for SuiteSocial
- Installing SuiteSocial
- Using the SuiteSocial Admin Setup Assistant
- Disabling SuiteSocial
- Changing Language Preference

Prerequisites for SuiteSocial

Before you install SuiteSocial, make sure that the following NetSuite features are enabled:

- Client SuiteScript
- Server SuiteScript
- Custom Records

You must also be an account administrator to install SuiteSocial.

To install SuiteSocial, see Installing SuiteSocial.

Installing SuiteSocial

SuiteSocial is implemented as a SuiteApp that is listed on NetSuite's Enable Features page. It is a managed bundle and is automatically updated whenever there are improvements or new added features. These defect fixes and enhancements are available after the SuiteApp is updated in your account.

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To install SuiteSocial:

1. Go to Setup > Company > Setup Tasks > Enable Features (Administrator).
2. Under the Social, click the link to SuiteSocial.
3. On the SuiteApp Details page, click **Install**.

⚠ **Important:** During installation or bundle upgrade, the system sets the **SuiteSocial Auto Post** and **SuiteSocial Tab** event scripts to inactive to prevent system disruptions. The scripts return to their previous state upon the completion of installation or upgrade procedures.

ⓘ **Note:** To properly re-enable SuiteSocial, you must check that all workflows created with the SuiteSocial Add Entry workflow action have been removed.

Supported NetSuite Records

You can activate SuiteSocial functionality on custom records and standard records. For more information, see Step 4: Enable Records.

The following is a list of standard NetSuite records where you can enable SuiteSocial:

- Build/Assembly Item (assemblyitem)
- Campaign
- Case
- Cash Refund
- Cash Sale
- Check
- Competitor
- Contact
- Credit Memo
- Customer
- Download Item
- Employee
- Estimate
- Event
- Inventory Part (inventoryitem)
- Invoice
- Issue
- Item Demand Plan
- Item Fulfillment
- Item Receipt
- Journal Entry
- Lead
- Lot Numbered Build/Assembly Item (lotnumberedassemblyitem)
- Lot Numbered Inventory Item (lotnumberedinventoryitem)

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- Non-Inventory Part (noninventoryitem)
- Opportunity
- Other Charge Item
- Partner
- Phone Call
- Project
- Prospect
- Purchase Order
- Sales Order
- Serialized Build/Assembly Item (serializedassemblyitem)
- Serialized Inventory Item (serializedinventoryitem)
- Service Item
- Task
- Vendor
- Vendor Bill
- Vendor Credit
- Vendor Payment
- Vendor Return Authorization

Changing Language Preference

You can choose the language in which NetSuite displays the following in SuiteSocial:

- SuiteSocial News Feed
- SuiteSocial Admin Setup Assistant pages
- System-generated posts

NetSuite displays the messages that you post exactly as they are entered and are not translated.
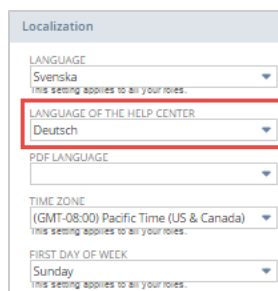
> ⚠️ **Important:** This preference is available only if an account administrator has enabled the Multi-Language feature at Setup > Company > Enable Features, on the Company subtab.

To set your language preference:

1. Go to Home > Set Preferences.
2. On the **General** subtab, select a language in the **Language** field under Localization. The following languages are supported:
   - Chinese (Simplified)
   - Chinese (Traditional)
   - Czech
   - Danish
   - Dutch
   - English (International)

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- English (U.S.)
- French
- French (Canada)
- German
- Italian
- Japanese
- Korean
- Portuguese (Brazilian)
- Russian
- Spanish
- Spanish (Latin America)
- Swedish
- Thai

3. In the **Language of the Help Center** field, select your preferred language for the Help Center. The following languages are supported:

The following languages are available:

- English
- Deutsch (German)
- 日本語 (Japanese)
- Español (Spanish)

> ⓘ **Note:** You can also set this preference directly from the NetSuite Help Center using the dropdown list at the top right corner of the page.
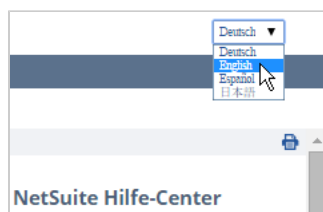
Whether you select the language preference directly in the Help Center or from Home > Set Preferences, the preference is maintained until you change it.

4. Click **Save**.

For more information, see the help topic Choosing a Language for Your NetSuite User Interface.

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Using the SuiteSocial Admin Setup Assistant

> ℹ **Note:** To view the SuiteSocial Admin Setup Assistant pages in another language, go to Home > Set Preferences and select your preferred language on the General subtab. For more information, see Changing Language Preference.

Each user who will use SuiteSocial needs a SuiteSocial profile record. SuiteSocial typically create profiles automatically for all users in your account.

Use the SuiteSocial Admin Setup Assistant to configure SuiteSocial and deploy it to users in your company. To access the SuiteSocial Admin Setup Assistant, go to Setup > Customization > SuiteSocial Setup. The SuiteSocial Admin Setup Assistant will guide you through the following configuration steps:

- Step 1: Create Profiles
- Step 2: Grant Permissions
- Step 3: Set Up Channels
- Step 4: Enable Records
- Step 5: Set Up Default Record Subscriptions
- Step 6: Set Up Preferences
- Step 7: Summary

Step 1: Create Profiles

Each user who will use SuiteSocial needs a SuiteSocial profile record. SuiteSocial typically create profiles automatically for all users in your account. The Create Profiles step in the SuiteSocial Admin Setup Assistant displays the percentage of users who have had SuiteSocial profiles successfully created. When you click Next from this step, SuiteSocial profiles will be created for users who do not yet have SuiteSocial profiles. You will receive email confirming the completion of the profiles creation or a message informing you that an error has occurred during the process.

> ℹ **Note:** The Create Profiles step will only be displayed if there are users without SuiteSocial profiles in your system or if the completion status of the automatic profile creation is not yet 100%. This step is a fail-safe mechanism that enables the administrator to manually initiate profile creation if the automated process fails during the installation of the SuiteApp.

Step 2: Grant Permissions

Use the Grant Permissions step to grant SuiteSocial permissions for all roles or specific roles in your account.

> ℹ **Note:** Newly added roles are not automatically reflected. You must manually add these roles. You must also revoke a role's access to SuiteSocial before you can deactivate the role.

By default, you can either start from a list of all roles or a blank list, and then manually update the list to remove or add roles to whom you want to give access.

> ⚠ **Important:** Changing between default settings of providing access to all roles or specific roles prior to clicking Save can cause your current modifications to disappear.

To grant permissions for all roles:

1. In the **Enable** field, select **All Roles**.

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2. Click **OK** when you are prompted to wait for the process to complete.

3. All standard and custom roles are added to the **Role** list.

4. Optionally, click the **x** icon next to the role to remove it from the list of roles that will be granted SuiteSocial access.

5. Click **Save** to save your changes, or click **Save and Next** to save your changes and proceed to the Set Up Channels step.

To grant permissions for selected roles:

1. In the **Enable** field, select **Only Selected Roles**.

   The Roles list is displayed with a list of roles that have previously been granted SuiteSocial access. The Roles list is empty on your first access of the SuiteSocial Admin Setup Assistant.

2. To add a role, select a role from the dropdown.

3. Click **Add**.

4. Optionally, click the **x** icon next to the role to remove it from the list of roles that will be granted SuiteSocial access.

5. Click **Save** to save your changes, or click **Save and Next** to save your changes and proceed to the Set Up Channels step.

Step 3: Set Up Channels

Channels can be used to categorize SuiteSocial news feed posts, for example by areas of interest, and include SuiteSocial record and status changes. When users subscribe to a channel, users will see posts associated with that channel in their news feed.

> **Note:** Creating subscription channels is optional. Users can post SuiteSocial messages without a subscription channel.

There are three pre-configured channels in SuiteSocial, namely:

- **Private Messages** – Messages directly posted to your news feed by other users. Only the sender and recipient can see a private message.
- **Record Changes** – Updates that are posted on your news feed every time a record that you are subscribed to changes.
- **Status Changes** – Updates that are posted on your news feed every time a colleague that you are subscribed to posts a status message.

To set up a channel:

1. To add a new SuiteSocial channel, enter a name for the channel on the list and then click **Add**.

2. To configure a channel, click **Edit** next to the channel.

> **Note:** You must save the added channel first, before you can modify its settings.

3. Enter the following information in the fields:

Field	Description
Name	Enter a name for the channel.
Inactive	Check this box if you want to deactivate the channel. When you mark a channel as inactive, it remains in the system for future reference. You can reactivate the channel in the Summary step of the SuiteSocial Admin Setup Assistant.

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Field	Description
Departments	Select the departments you want to make the channel available to.
Locations	Select the company or branch locations you want to make the channel available to.
Roles	Select the roles you want to make the channel available to.
Individuals	Select the users that you want to make the channel available to.
Allowed Posters	Select the users that can post to the channel.
Auto Subscribe	Check this box if you want users to automatically subscribe to news feeds from this channel. If this box is cleared, users will only see news feeds from this channel if they select it from the Channels list of their SuiteSocial News Feed.
Allow Comments	Check this box if you want to let users post comments to news feeds from the channel.
Subsidiary	Select the subsidiaries you want to make the channel available to. ⓘ **Note:** You can select only one subsidiary as a channel filter for this version of SuiteSocial.

4. Click **Save**.

5. Click **Edit** next to the channel to modify the information, or click **X** to delete the channel.

6. After adding channels or configuring existing channels, click **Save** to save your changes, or click **Save and Next** to save your changes and proceed to the Enable Records step.

Step 4: Enable Records

The Enable Records step lets you choose the record types where you want to enable SuiteSocial. SuiteSocial features on records include:

- **SuiteSocial subtab** — SuiteSocial-enabled record types have a SuiteSocial subtab that lets you see the posts that have been made on the record, create new posts about the record or enter comments on record posts, and view the followers of the record. For more information, see Viewing Record Posts and Posting a Message and Adding Comments to a Record.

- **Follow** — SuiteSocial-enabled record types have a **Follow** text which you click to indicate that you want posts about the record to automatically show up in your SuiteSocial News Feed. For more information, see Following a Record.

- **Auto Subscription Posts** — SuiteSocial-enabled subscriptions (such as record, related record, related transaction, and saved search subscriptions) generate automatic posts every time there are corresponding changes made . Auto subscription posts appear in the SuiteSocial News Feed of users who are subscribed to that particular record or record type. Administrators can specify what types of record users can automatically subscribe to .

- **Auto Post on Create** — SuiteSocial-enabled record types generate automatic posts every time a record of that type is created. Auto posts on create are posted to news feeds of users who are subscribed to that particular record type, and who have roles associated with those specific records (for example, a Sales Rep assigned to a Lead.)

  ⓘ **Note:** Enabling automatic subscriptions and automatic posts on record types may cause unnecessary system posts on your news feed. You should use a saved search on **Auto Subscription Posts** and **Auto Post on Create** to limit the number of records that generate system posts to the news feed.

- **Scheduled Posts** — SuiteSocial-enabled record types can be used to generate metrics (for example, total count of records) based on the results of saved searches. The results of these saved searches,

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plus a custom message entered by an Admin, are posted to news feeds of users who are subscribed to that particular metric.

> **Note:** The internal ID for some of the records is enclosed in parenthesis.

Enabling SuiteSocial on Record Types

1. On the Enable Records page, click **Add Row** at the bottom of the table.

2. In the **Record Name** dropdown, select the type of record where you want to enable SuiteSocial.

3. In the **Autopost on Create** column, check the box if you want SuiteSocial to send a post to subscribers every time a record of that type is created, and to users with roles that are associated with the record of that type. For more information, see Adding a Record Subscription.

4. Click **Add**.

5. Click **Save**. Wait for the Save dialog to appear.

6. In the Save dialog, click **OK**.

7. Enter the following information in the fields:

Field	Description
Inactive	Check this box if you want to deactivate SuiteSocial for that record type. When you mark a SuiteSocial record as inactive, it remains in the system for future reference, but is not available for selection. You can reactivate the SuiteSocial record in the Summary step of the SuiteSocial Admin Setup Assistant.
Autopost on Create	Check this box if you want SuiteSocial for that record type to send a post to subscribers every time a record is created.

8. On the Edit SuiteSocial Record page, click **Save**.

9. Optionally, in the **Delete** column, click the **x** icon of a record type to delete it from the list.

10. Click **Save** to save your changes, or click **Save and Next** to save your changes and proceed to the Set Up Default Record Subscriptions step.

Configuring SuiteSocial Functionality on Record Types

After adding the record types where you want to enable SuiteSocial, you can start editing the SuiteSocial functionality for each record type.

In the **Edit Details** column of the Enable Records page, click **Edit** to configure the following SuiteSocial functionality:

- Adding Tracked Fields
- Adding Scheduled Posts for the Record Type
- Adding Record Subscriptions
- Adding Related Record Subscriptions
- Adding Saved Search Subscriptions

Adding Tracked Fields

1. In the **Tracked Field** subtab, click **New Tracked Field**.

   All changes to the field that you select for the record type will generate SuiteSocial news feed posts. The posts will be displayed on the news feeds of users who are subscribed to the record type.

2. Enter the following information in the fields:

- **Inactive** — Check this box to deactivate the tracked field. When you mark a tracked field as inactive, it remains in the system for future reference, but it is not available for selection. You can reactivate the tracked field in the Summary step of the SuiteSocial Admin Setup Assistant.
- **Field** — Select a field on the form that you want to track.
- **Visible to Customers** — Check this box if you want customers to see updates to this field on their news feed.

3. Click **Save**.

4. When you are finished setting up SuiteSocial for the record type, click **Save** on the SuiteSocial Record page.

Adding Scheduled Posts for the Record Type

Schedule posts are saved search-based metrics (for example, total count of records) generated from SuiteSocial-enabled records. The results of these saved searches, plus a custom message entered by an Administrator, are posted to news feeds of users who are subscribed to that particular metric.
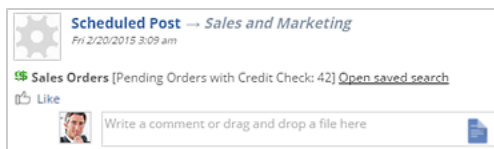
1. In the **Scheduled Posts** subtab, click **New Scheduled Post**.

2. Enter the following information in the fields:
   - **Inactive** — Check this box if you want to deactivate the scheduled post. When you mark a scheduled post as inactive, it remains in the system for future reference. You can reactivate the scheduled post in the Summary step of the SuiteSocial Admin Setup Assistant.
   - **Name** — Enter a name for the scheduled post.
   - **Saved Search** — Select a saved search.

     You should use a summary result when creating the saved search. Each record that results from a saved search will create a scheduled post, and having numerous results may flood the news feed. For more information, see the help topic Saved Searches.

     > ⚠ **Important:** For the scheduled post to work, make sure that you select all employees in the **Audience** subtab of the saved search.

   - **Post Text** — Enter a message that will be posted with the results of the scheduled post.

     For example, if you want your scheduled post to show the number of employees based on an employee count saved search, you enter the following information in this field:

     "There are {1} employees."

     The tag "{1}" represents the saved search results column that the metric comes from. It follows the order of columns in the search results including those columns that are not shown in summary mode. It is usually used with a Count or Sum summary grouping in the saved search.

   - **Icon** — Select an icon that will appear with the scheduled post message.
   - **Post on Weekends?** — Check this box if you want SuiteSocial to post results of scheduled posts on weekends.
   - **Channel** — Select a channel where results of the scheduled post will be posted to.

3. In the **Time of Day** column, enter a time when you want the scheduled post to run. You can enter the time of day in 24:00 or hh:mm AM/PM format.

4. Click **Add**.

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5. Click **Save**.

6. When you are finished setting up SuiteSocial for the record type, click **Save** on the SuiteSocial Record page.

Adding Record Subscriptions

A record subscription is a type of SuiteSocial subscription that automatically sends news feed posts to certain users about records they are associated with, without them having to manually follow each record. For example, a sales person could receive SuiteSocial updates about any Customer they are assigned to.

When creating a record subscription, you must define the field that links the record type to the user, and the roles to whom you want to deploy the subscription. You can also define a saved search to further filter the subscription to records that meet the saved search criteria.

1. In the **Record Subscriptions** subtab, click **New Record Subscription**

2. Enter the following information in the fields:

   - **Inactive** — Check this box to deactivate the record subscription. When you mark a record subscription as inactive, it remains in the system for future reference, but it is not available for selection. You can reactivate the record subscription in the Summary step of the SuiteSocial Admin Setup Assistant.

   - **Name** — Enter a name for the record subscription.

   - **Field** — Select a field from the record type that you selected in the Record Type field. The values available are fields on the selected record type that are linked to users (such as Assigned, Sales Rep, Supervisor, Approver, and so on).

   - **Saved Search** — Select a saved search.

     > ⚠️ **Important:** Make sure that saved searches used are public and do not use the '-Mine-' keyword for a user's current filters.

   - **Description** —Enter a short description for the record subscription.

3. In the **Role** column, select a role that you want to deploy the record subscription to.

4. Click **Add**.

5. Repeat steps 3–4 to add more roles.

6. Click **Save**.

7. When you are finished setting up SuiteSocial for the record type, click **Save** on the SuiteSocial Record page.

Adding Related Record Subscriptions

A related record subscription is a type of SuiteSocial subscription that automatically sends news feed posts to certain users about records related to records they are following, either manually or via record subscription. For example, a sales person could receive updates about Cases filed by Customers they are following in SuiteSocial.

When creating a related record subscription, you must define the record type field, and the roles to whom the automatic posts will be sent.

1. In the **Related Record Subscriptions** subtab, click **New Related Record Subscription**.

2. Enter the following information in the fields:

   - **Inactive** — Check this box to deactivate the related record subscription. When you mark a related record subscription as inactive, it remains in the system for future reference, but it is not available for selection. You can reactivate the related record subscription in the Summary step of the SuiteSocial Admin Setup Assistant.

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- **Name** —Enter a name for the related record subscription.
- **Related Record** — Select a related record to the SuiteSocial record subscription to which you want users to be automatically subscribed to.
- **Related Record Field** — Select a field from the related record that you selected in the Related Record field. The values available are fields that are on the selected related record, and that are of the currently selected record type.
- **Description** — Enter a short description for the related record subscription.

3. Click **Save**.
4. When you are finished setting up SuiteSocial for the record type, click **Save** on the SuiteSocial Record page.

Adding Saved Search Subscriptions

A saved search subscription is a type of SuiteSocial subscription that automatically sends news feed posts to certain users about records that meet the criteria of the saved search, without them manually following those records.

This subscription type is particularly helpful for users who do not have a direct link to a record type. For example, a CEO with no direct link to a sales person could use a saved search subscription to get posts about all Customers in a particular industry.

Saved search subscriptions can stand alone as opposed to a saved search field of record subscriptions. However, it is possible that when users subscribe to a saved search, they will not receive posts because they do not have access to the record type used by the saved search. The posts may be seen in the SuiteSocial News Feed but the record links will not work for security reasons.

1. In the **Saved Search Subscriptions** subtab, click **New Saved Search Subscription**.
2. Enter the following information in the fields:
   - **Inactive** — Check this box to deactivate the saved search subscription. When you mark a saved search subscription as inactive, it remains in the system for future reference, but it is not available for selection. You can reactivate the saved search subscription in the Summary step of the SuiteSocial Admin Setup Assistant.
   - **Saved Search** — Select a saved search.

   > ⚠️ **Important:** Make sure that saved searches used are public and do not use the '-Mine-' keyword for a user's current filters.

   - **Description** — Enter a short description for the saved search subscription.
3. Click **Save**.
4. When you are finished setting up SuiteSocial for the record type, click **Save** on the SuiteSocial Record page.

Step 5: Set Up Default Record Subscriptions

Default record subscriptions enable roles to be automatically subscribed to a record type by way of a field in that record, that associates a user with the record; for example, Sales Rep.

> ℹ️ **Note:** If you are defining default record subscription for roles, make sure the roles you use are roles provided with SuiteSocial permission.

When you access the Set Up Default Record Subscriptions step and SuiteSocial detects that there are no default record subscriptions yet, you will be asked if you want SuiteSocial to automatically save the following default record subscriptions:

- My Cases
- My Customers
- My Issues
- My Leads
- My Opportunities

⚠️ **Important:** For SuiteSocial to automatically save and apply the five suggested default record subscriptions, make sure that either the required NetSuite features for corresponding records used in these subscriptions are enabled (through Setup > Company > Enable Features), or the required roles for these subscriptions (such as Support Person and Sales Person) do exist and are not inactive.

For more information about enabling NetSuite features, see the help topic Enabling Features. For more information about managing NetSuite roles, see the help topic NetSuite Roles Overview.

To set up the suggested default record subscriptions:

1. When you are prompted to save the default record subscriptions, click **Yes**.

2. If you are prompted that a default record subscription type was not added for your company, click **OK**.

   ℹ️ **Note:** You can opt to manually add your company's default record subscriptions by clicking **New Default Record Subscription**, or you can opt to know more about the possible reasons why the subscriptions were not automatically added by clicking **Click here for details >>**. In cases where this option is not yet supported by your browser, a standard, longer message alert appears instead, with all the possible reasons noted.

3. Click **Save** to save your changes, or click **Save and Next** to save your changes and proceed to the Set Up Email Preferences step.

To set up new default record subscriptions:

1. Click **New Default Record Subscription**.

   The New Record Subscription page opens.

2. In the **Record Type** dropdown, select the record type that you want roles to be automatically subscribed to by default.

3. Check **Inactive** if you want to deactivate the default record subscription. When you mark a default record subscription as inactive, it remains in the system for future reference. You can reactivate the default record subscription in the Summary step of the SuiteSocial Admin Setup Assistant.

4. In the **Name** field, enter a name for the default record subscription.

5. In the **Field** dropdown, select a field under the record type.

   Changes made to the selected field will trigger the creation of a SuiteSocial post that will be posted to the role that you define in the next steps.

6. In the **Saved Search** dropdown, select a saved search.

   Changes made to the record that meet the saved search criteria will trigger the creation of a SuiteSocial post that will be posted to the role that you define in the next steps.

7. In the **Description** field, enter a short description for the record subscription.

8. In the **Role** column, select a role that you want to be automatically subscribed to the record by default.

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Users who are assigned the role that you selected will automatically receive news feed posts on the default record subscription.

9. Click **Add**.

10. Repeat Steps 7 through 8 to add more roles.

11. Click **Save** to save your changes, or click **Save and Next** to save your changes and proceed to the Set Up Email Preferences step.

Step 6: Set Up Preferences

Use the Set Up Preferences step to configure email and general preferences for SuiteSocial digests, scheduled post notifications, and error messages. SuiteSocial digests are email summaries of posts on your SuiteSocial News Feed. You get summaries of posts from records, colleagues, and channels that you are subscribed to. Scheduled posts email notifications are email summaries of posts from default record subscriptions. SuiteSocial error message recipient is the email recipient for all SuiteSocial error messages.

You can also configure general preferences for SuiteSocial that determines how the news feed appears to the users and what additional options are available to them.

> **ⓘ Note:** A NetSuite administrator is usually selected as the email sender, recipient, or both. If the SuiteSocial error message recipient is not defined, all users with administrator privileges will receive the SuiteSocial error notification.

To set up email preferences:

1. Provide values for the following fields:

   - **SuiteSocial Digest Sender** — Select the email sender for SuiteSocial Digests.

   - **SuiteSocial Scheduled Post Sender** — Select the email sender for SuiteSocial scheduled posts.

   - **SuiteSocial Error Message Recipient** — Select the email recipient of SuiteSocial error messages.

   - **Email Language** — Select the language to be used in the email.

   - **SuiteSocial Email Capture Address** — Enter the email capture address for SuiteSocial. Replies to posts made through email will be sent to this address.

     > **ⓘ Note:** The SuiteSocial Email Capture address is available in the Manage Plug-ins page. You must first enable the email capture feature to obtain the email address. For more information, see Enabling SuiteSocial Email Capture.

2. Click **Save** to save your changes, or click **Save and Next** to save your changes and proceed to the Summary step.

To set up general preferences:

1. Set the following preferences:

   - **Enable Image Preview** — Check this box to display an image preview of files uploaded in SuiteSocial.

   - **Allow Customers to Upload Files** — Check this box to enable customers to upload files to the news feed.

   - **Show Colleague Pane for Customers** — Check this box to show the colleague pane on customers' news feed.

   - **Integration to Kudos** — Check this box to integrate Kudos to SuiteSocial. This will enable you to give kudos to other users through SuiteSocial.

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> **Note:** This preference is available if the Kudos feature is enabled on your account. To enable Kudos, go to Setup > Company > Enable features, and then click the Employees subtab. Under Performance Management, check the **Kudos** box.

- **Create and Edit Channel from News Feed** — Check this box to enable users to create and edit a channel from the news feed.

- **Show User Restriction Details** — Check this box to display the user's details beside the restriction fields when you create or edit a channel from the news feed. For example, when the setting is enabled, the Department restriction setting will display the name of the department that the current user belongs to (e.g. Department: Finance).

2. Click **Save** to save your changes, or click **Save and Next** to save your changes and proceed to the Summary step.

Step 7: Summary

The Summary step lets you review the settings that you made in the preceding SuiteSocial Setup Assistant steps. You can view the summary of configured permissions, channels, records, and default record subscriptions. Also, you can reactivate inactive settings in this step.

To view setup summary:

1. In the **Permissions** list, check the roles that you granted SuiteSocial access to.
2. In the **Channels** list, check the channels that you added.
3. In the **Records** list, check the records that you enabled.

   If you want to make further changes, click the link for the record name, tracked field, scheduled post, the record subscription, the related record subscription, or the saved search subscription.

4. In the **Default Record Subscriptions** list, check the default record subscriptions that you added.

   If you want to make further changes, click the default record subscription name link.

5. Click **Finish** to complete the SuiteSocial Admin Setup Assistant steps.

Enabling SuiteSocial Email Capture

Enabling the email capture feature lets users reply to posts, comments, and private messages in SuiteSocial through email.

1. Go to Customization > Plug-ins > Manage Plug-ins.
2. Check the **SuiteSocial Email Capture** box.

   > **Important:** Take note of the email address in this field. This will be used to set up the email capture address.

3. Click **Save**.

   To set up the email capture address, see Step 6: Set Up Preferences.

Linking the News Feed to the SuiteSocial Menu Tab

You can configure a presentation tab for the SuiteSocial menu tab so that it displays your news feed when you click on it. Before doing so, you must hide the SuiteSocial tab that came with previous versions of the SuiteApp.

To Hide the SuiteSocial Tab:

1. Go to Customization > Centers and Tabs > Center Tabs.
2. On the Custom Center Tabs page, click the **Edit** link next to SuiteSocial.
3. On the **Audience** subtab, clear the **Roles** box.
4. Click **Save**.

To Add a Presentation Tab:

1. Go to Lists > Web Site > Tabs > New.
2. On the New Tab page, click **New Presentation Tab**.
3. On the Presentation Tab page, set values for the following fields:

Field	Value
Label	SuiteSocial
Meta Tag HTML	<script> window.location = nlapiResolveURL("SUITELET", "customscript_suitewall", "customdeploy_suitewall"); </script>
Display in Web Site	No

> **(i) Note:** Keep the default selection for the **Web Site** and **Welcome Page Portlet Alignment** fields.

4. On the **Audience** subtab, check the **Employees** box to display the tab to all employees.
5. Click **Save**.

Setting Up the SuiteSocial File Drag and Drop Folder

Files uploaded to the SuiteSocial news feed are stored in the File Drag and Drop folder that is automatically created during installation. If the folder was not successfully created, you have to manually set it up to enable the File Drag and Drop feature for SuiteSocial.

Creating an Admin Group

1. Go to Lists > Relationships > Groups > New.
2. On the Create Group page, set the values for the following fields:
   - What kind of group would you like to create? – **Dynamic**
   - What kind of members would you like to include? – **Employee**
3. Click **Continue**.
4. On the Create Dynamic Employee Group page, set the values for the following fields:
   - Name – **SuiteSocial Admin Group**
   - Saved Search – **SuiteSocial Administrators Search**
5. Click **Save**.

Creating the File Drag and Drop Folder

1. Go to Documents > Files > File Cabinet > New.

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2. On the Document Folder page, set the values for the following fields:

   - Folder Name – **SuiteSocialFileDragAndDrop-BE24A047-916C-44F8-B840-5068CB75D6B6**
   - Restrict By Group – **SuiteSocial Admin Group**

   > **ⓘ Note:** Ensure that the **Sub-Folder Of** field is blank so that the folder is created on the root of the file cabinet.

3. Click **Save**.

Assigning a SuiteSocial Integration Role to an Employee

> **⚠ Important:** Adding the integration role to an existing employee is not recommended.

1. Create a new employee.

   Enter values for the Name, Email, and Subsidiary field. For more information, see the help topic Adding an Employee Record e.

2. On the employee record, click the Access subtab, and then select the **Give Access** box.
3. Enter a password, and then retype the password in the appropriate field to confirm.
4. In the Roles sublist, select the integration role to assign to this employee record:

   a. **SuiteSocial Integration Read Access** – This role includes read-only access to SuiteSocial custom records.

   b. **SuiteSocial Integration Full Access** – This role includes full access to SuiteSocial custom records.

   > **ⓘ Note:** Both roles have read-only access to Employee and Subsidiary records.

5. Click **Add**.
6. Click **Save**.

Disabling SuiteSocial

You cannot disable SuiteSocial on the Enable Features page. Because this feature is implemented as a SuiteApp, you must uninstall the SuiteApp to disable the feature from your account.

To Uninstall SuiteSocial:

1. Go to Customization > SuiteBundler > Search & Install Bundles > List.
2. In the **Action** column dropdown for SuiteSocial, click **Uninstall**.

   > **ⓘ Note:** You can also click the **Name** column link to go to the SuiteApp Details page for SuiteSocial, and click **Uninstall**

3. Wait for the process to complete.

Working with the SuiteSocial News Feed

You can view your entire SuiteSocial news feed in a full window by clicking the **SuiteSocial** tab. See Navigating the SuiteSocial News Feed for information about what you can do with the interactive news feed. For information about managing your SuiteSocial profile, including your subscriptions and email notification settings, see Working with SuiteSocial Profiles.

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You can add the SuiteSocial News Feed portlet if you want to view your news feed on your dashboard. For more information, see Adding the SuiteSocial News Feed Portlet.

On SuiteSocial-enabled records, you can access the news feed for the record on the **SuiteSocial** subtab. For more information, see Working with Records in SuiteSocial.

Navigating the SuiteSocial News Feed

The SuiteSocial News Feed displays:

- Updates from a channel, record, or colleague that you subscribe to
- Automatic posts that your profile receives based on the configuration set up by your NetSuite account administrator
- Status messages of colleagues you are following

Instructions in this guide refer to key elements in the SuiteSocial News Feed. To guide you with the names used to refer to elements and sections, refer to the following screenshot and table.

	Page Element or Section	Description
1	Colleague view	Click the dropdown arrow to view display options for the colleagues pane. You can select Tile or List view.

Page Element or Section	Description
2 Colleague search field	Use this box to search for colleagues. For more information, see Following and Searching for Colleagues from the News Feed.
3 Colleague subscription lists	Click the **Following** list to view the colleagues you are following. You can view posts from these colleagues in your news feed. Click the **Followers** list to view the colleagues who are following you. Your followers will be able to see the files, messages, and status changes that you post, on their news feed. ⓘ **Note:** You cannot follow SuiteSocial users who are customers.
4 Channels list	Use the Channels list to filter posts in your news feed. All the channels that you are subscribed to are available for selection. Click **Expand Channels** to show the list of channels you are not currently subscribed to.
5 News feed search	Enter partial or complete keywords, a string separated by 'AND', 'OR', and spaces, a string enclosed in double quotes, or a hashtag to automatically filter the posts currently displayed in your news feed panel.
6 New Message	Click **New Message** to send a private message to other SuiteSocial users. You can send a message, with file attachments, to one or more recipients.
7 Edit profile	Click this icon to edit your SuiteSocial Profile page. For more information, see Working with SuiteSocial Profiles.
8 News feed composition area	Compose a message in this text area to share updates on your news feed. You can drag and drop a file or photo to this text area to attach them to your post. You can also manually upload files by clicking the icon on the right side of the text area.
9 File upload progress indicator	When you attach a file to your post, you can see a progress bar below the composition area. When the file upload is completed, the file icon and the file name will appear below the composition area.
10 Channel selector	This is where you select the channel where you want your message to post. The default channel is Public. You can share posts to channels that you are currently subscribed to.
11 News feed panel	This section displays your posts and posts from colleagues, records, or channels that you follow. Use the Channels list or a hashtag to filter the posts. For more information, see Viewing and Deleting News Feed Posts. Use the news feed search box to search for posts. For more information, see Using Search to Find News Feed Posts.
12 Like	Click the like icon to like a post or comment. You can see the other users who have also liked the post.
13 Hashtag	Add a hashtag to your posts or comments to find related content. You can click the hashtag link or search for a hashtag to view related posts.

The SuiteSocial News Feed page also includes a question mark icon next to the page name. Click the icon to display help content for the various elements of the page.

With the SuiteSocial News Feed, you can do the following:

- Viewing and Deleting News Feed Posts
- Using Search to Find News Feed Posts
- Accessing QuickView on News Feed Record Links
- Posting a Message to a Channel

- Sending a Private Message to a Colleague
- Adding Comments to a News Feed Post
- Posting a Status Message
- Following and Searching for Colleagues from the News Feed
- Linking Posts to Records

Viewing and Deleting News Feed Posts

SuiteSocial displays your news feed unfiltered indicated by the default channel selection, Public. You can filter posts on your news feed by selecting a channel.

1. Click the **SuiteSocial** tab, or go to SuiteSocial > News Feed > View.

2. To view news feed posts made in a particular channel, select a channel from the list.

   All channels you are subscribed to are available for selection, and channels you are not currently subscribed to are available when you click **Expand Channels**. The news feed refreshes to show only the posts for the selected channel. For more information, see Adding a Channel Subscription.

   > **ⓘ Note:** You can view records in QuickView if you have permission to view the record or record type. For more information, see Accessing QuickView on News Feed Record Links.

3. You can click the images in the news feed to view them in a popup window. You can add, like, and delete comments, and upload files from the popup window.
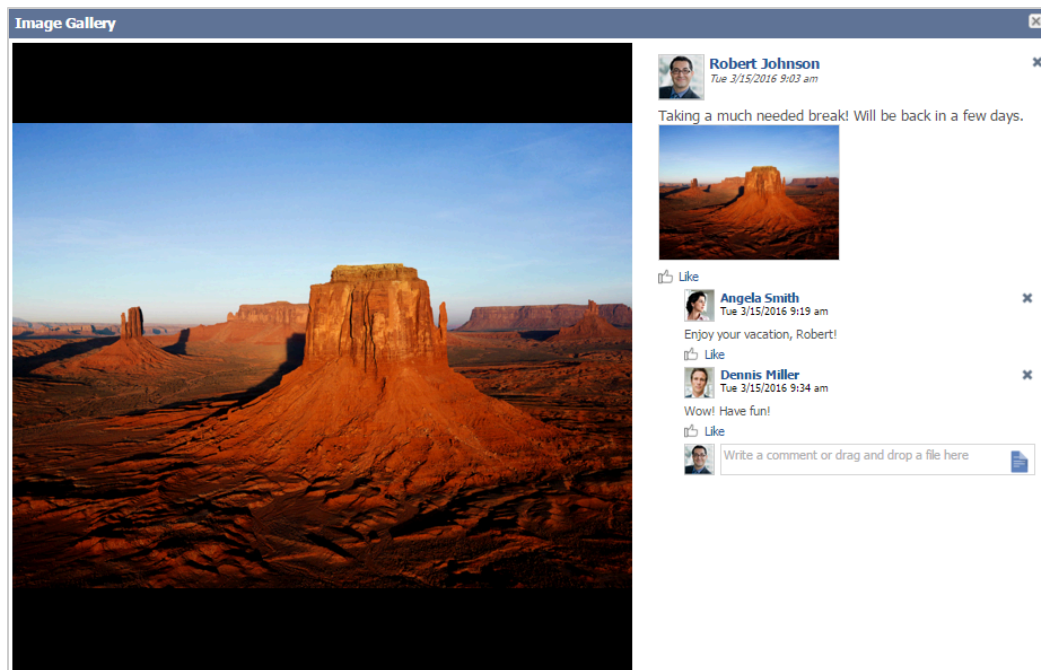
4. To delete a news feed post, click the **X** icon in the top right corner.

   The **X** icon only appears on posts and comments that you published.

5. Click **Yes** in the confirmation dialog.

News feed posts for saved search subscription do not take precedence over the posts of other subscription types (like record subscription or related record subscription). If an update on a record qualifies for two types of subscriptions (for example, manual and saved search), the normal post will be shown.

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Using Hashtags to Filter News Feed Posts

You can add a hashtag to posts or comments on SuiteSocial to categorize them. Hashtags will appear as a link on the news feed. You can click a hashtag link or search for a hashtag to view related posts. Right-click on the hashtag to copy the link and share it to others.

Note that search results will initially show the posts where the hashtag was used. When searching for a hashtag in a comment, you may need to expand the comments section to see the hashtag.
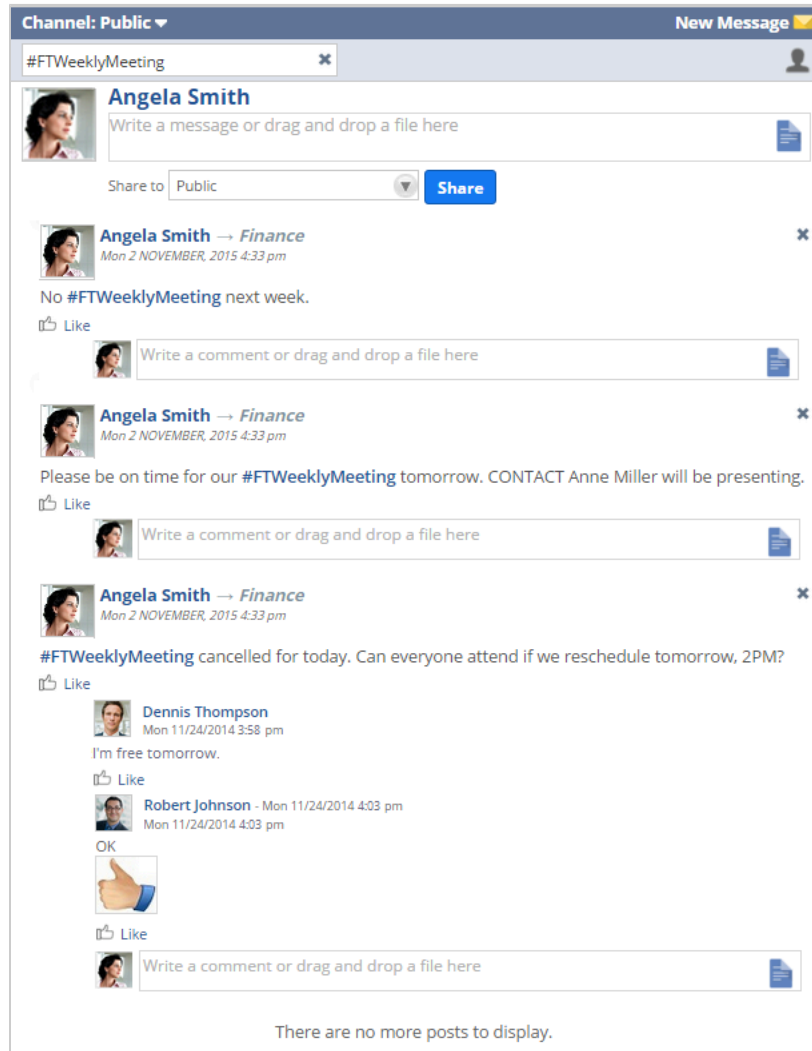
SuiteSocial Posts Display Rules

In SuiteSocial, the posts displayed on your news feed will vary depending on the following scenarios:

Scenario	Posts Displayed on the News Feed
When selected channel is Public	- Posts you published - Posts from subscribed channels - Changes to records you follow - Posts from colleagues you are following

| Scenario	Posts Displayed on the News Feed
When selected channel is Private Messages	All private messages you sent and received
When selecting a channel other than Public	All post from the selected channel
When viewing the SuiteSocial subtab on a record page	▪ Posts for the record ▪ Posts that link to the record ⓘ **Note:** You must have access to the channel where the post was created.
When selecting a colleague	▪ Posts you sent to and received from the selected colleague ▪ Posts from the selected colleague, if you have read access to the channel where the post was created
When you exclude updates to a tracked field	▪ If the excluded field is updated together with another field, to which you are subscribed, you will see a notification for all the tracked fields updated on the record. ▪ If only the excluded field is updated, you will not see a notification for the tracked field updated on the record.

Using Search to Find News Feed Posts

Using the search box above the news feed panel, you can search for any post in your SuiteSocial News Feed.
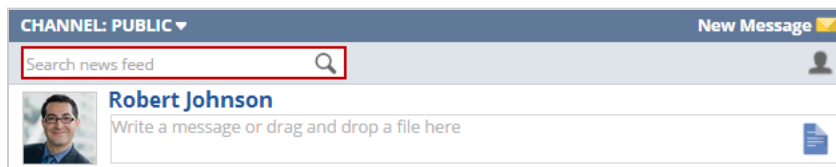
Searching filters the posts currently displayed in your news feed panel to show only the posts that contain matches per keyword. You can enter any of the following in the search box:

▪ Partial or complete keywords

▪ A string separated by 'AND', 'OR', and spaces, or enclosed in double quotes

▪ Hashtags used in posts or comments

Searching is not case sensitive. Clear the search box or click **X** in the search box to go back to the previously displayed news feed.

To run the same search in another channel, or in a colleague's posts from your subscription lists, select the channel or colleague name link without clearing the Search box. A message indicates if no matches are found.

Accessing QuickView on News Feed Record Links

You can access a QuickView hover window for records tagged or linked to posts in your SuiteSocial news feed. To view the record in QuickView, point your mouse to the QuickView icon next to the record link. For more information about the record, click **View**. If you want to modify the record, click **Edit**.

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If you do not have permission to view a record or record type, you cannot view it in QuickView. For more information, see the help topic Using QuickViews.

> **ⓘ Note:** QuickView is not available on Competitor and Download Items records.

Posting a Message to a Channel

You can post messages or files to a channel that can be viewed by users who are subscribed to that channel on the SuiteSocial News Feed page or in the portlet.

To post a message to a channel:

1. Enter your message or drag and drop a file to the composition area. You can upload files manually by clicking the icon on the right side of the composition area.

   To refer to a record within your message, enter **@** followed by global search syntax to find the record and link the record in your post. For more information, see Linking Posts to Records.
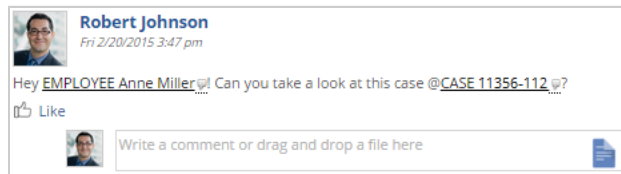
2. In the **Channel** dropdown, select the channel where you want to post your message.

   > **ⓘ Note:** If you do not select a channel, your message will be posted in the default channel, Public. Only users who are subscribed to your profile will see the message in their news feeds. Users who are not following you can still view your post when they search for colleagues and click the View Previous Posts link.

3. Click **Share** or press Ctrl + Enter to post your message.

   All users who are subscribed to your selected channel will see your post in their news feed.

Supported File Types

Icon	File Type
	HTML files
	XML files
	Excel files
	Word documents
	Powerpoint presentations
	Text files

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Icon	File Type
▣	Unknown file types
▣	PDF files
▣	Compressed file types (.zip and .rar)
▣	Image files

> **ⓘ Note:** This icon is displayed for image files when the Enable Image Preview option is not enabled.

Adding Comments to a News Feed Post

You can add and 'like' comments, or add files to messages appearing in your SuiteSocial News Feed. If you have enabled email alerts, you can also comment on a post by replying to the notification email.

1. On the SuiteSocial News Feed page or in the portlet, click the **Comment** link for the news feed post.

   To like a comment, click the like icon below the comment.

   To find the post you want to comment on, filter the news feed by channel or search for the post. For more information, see Viewing and Deleting News Feed Posts and Using Search to Find News Feed Posts.

   Alternatively, if you have enabled the email capture feature, you can add a comment to a post by replying to the SuiteSocial email alert. You can also include a single file attachment to add a file to your comment. For more information, see Enabling SuiteSocial Email Capture.

   > **ⓘ Note:** The reply via email feature is fully supported on Gmail and Outlook clients. On other email clients, replies made through email may have formatting issues when posted on the SuiteSocial news feed.

2. Enter your comment or drag and drop a file in the message box that appears below the post.

   To tag or link records in comments, type **@** followed by a part of or the entire record name as you would use NetSuite's global search, and select the record in the results. For more information, see Linking Posts to Records.

3. Click **OK** or press Ctrl + Enter to post your message.

4. The SuiteSocial News Feed loads with your comment.

   If the post you are commenting on is linked to a record, all users who are subscribed to that record will see your comment. If the post you are commenting on is from a channel, all users who are subscribed to that channel will see your comment.

Sending a Private Message to a Colleague

On the SuiteSocial News Feed page or in the portlet, you can send messages or files directly to colleagues. Only the sender and the recipient can see private message posts in their news feed.

1. Do any of the following to select the colleague that you want to send a private message to:
   - On the upper right portion of the news feed pane, click **New Message**.

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- From your **Following** or **Followers** list, click the name of the colleague you want to send a private message to. On the popup that appears, click **Send message**.

- Search for your colleague using the search box on the colleague pane. Enter at least three characters that map to the colleague's name to run the search. On the search results, click **Send message**.

  For more information, see Following and Searching for Colleagues from the News Feed.

- From your SuiteSocial news feed, click the name of the user that you want to send a private message to. On the popup that appears, click **Message**.

2. On the Private Message dialog, do the following:

   - To add more recipients for your message, type the user's name in the **To:** field.

   - Enter your message or drag and drop a file in the message composition area. You can also categorize your private messages by adding a hashtag.

   - To tag or link records in private messages, type **@** followed by a part of or the entire record name as you would use NetSuite's global search, and select the record in the results. For more information, see Linking Posts to Records.

3. Click **Send** or press Ctrl + Enter to send your message.

   The private message is posted in the SuiteSocial news feed of the recipient. You can also like a private message by clicking the Like icon.

Giving Kudos to Other SuiteSocial Users

Kudos lets you give recognitions to other employees for their exemplary performance or significant contributions to a project. If you enabled the **Kudos** feature and the **Integration to Kudos** preference on your account, you can give kudos to other users through SuiteSocial. For more information on enabling Kudos, see Step 6: Set Up Preferences.

To give Kudos to other SuiteSocial users:

1. From the Colleague pane or the news feed, click the name of the SuiteSocial user that you want to give Kudos to.

2. On the popup that appears, click **Give Kudos**.

3. On the Kudos dialog, do the following:

   a. On the recipients field, enter the name of additional users that you want to give Kudos to.

   b. Enter a short description about the recognition you are giving.

   c. From the Supported Values list, select one or more value that best describes the recognition.

   d. Click **Give Kudos**.

   The kudos will be posted to the **Recognition** channel.

Posting a Status Message

On the SuiteSocial News Feed page or in the portlet, you can view the status messages of all colleagues that you are subscribed to. The portlet refreshes every time you or a colleague posts a status message.

You can post status messages, files, or images to let colleagues following you (or subscribed to your profile) know your status updates, such as what you are currently working on or changes about your contact availability.

1. On the SuiteSocial News Feed page or in the portlet, select **Status Changes** from the **Channels** list.

2. Enter your message or drag and drop a file in the message box.

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> **ⓘ Note:** Tagging records in status messages is not available. For more information, see Linking Posts to Records.

3. Click **Share** or press Ctrl + Enter to post your status message.

The SuiteSocial News Feed loads with your status message. On your profile page, the **Last Status** field is updated with your last status post.

Select **Status Changes** in the Channels list to view status messages in your news feed.

Following and Searching for Colleagues from the News Feed

You can search for colleagues to add or remove them from your Following list, send private messages to, or view their previous posts.

You can enter any of the following in the search box above the Colleague list:

- Keywords that map to all or part of a colleague's name.
- Use a wildcard (%) followed by a few characters to display all colleagues whose name contains the specific characters used in the search.
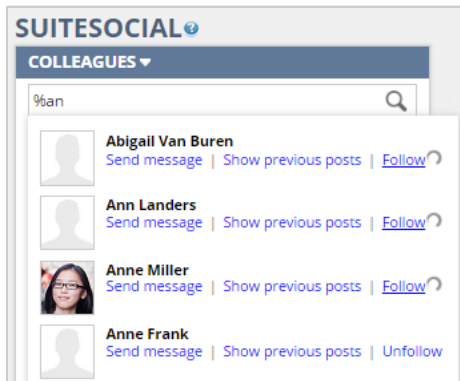
In the search results, you can do the following:

- Click the **Send message** link for a colleague, to send him or her a private message (see Sending a Private Message to a Colleague).
- Click the **Show previous posts** link to view a colleague's previous posts including private messages sent to you in your news feed.

  When you do this, the message box in the newsfeed composition area becomes inactive, and the Channel dropdown changes to display the name of the colleague by whose previous posts the news feed is filtered.

- Click **Follow** to subscribe to the colleague's posts, or **Unfollow** to stop your subscription.

  You can click the follow links simultaneously to subscribe to multiple colleagues. Your colleague subscription list automatically updates to add or remove the colleague's name.

> **ⓘ Note:** You cannot follow SuiteSocial users who are customers.

Linking Posts to Records

You can tag or link records in your posts by typing @ followed by a part or all of the record name like you would use NetSuite's global search, for example: @cust:Wolfe, and selecting the record in the results. You can link more than one record in a post.

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> **ⓘ Note:** You can link records to all posts except status messages.

You can view records linked in posts in QuickView. For more information, see Accessing QuickView on News Feed Record Links.

For more information about using the global search syntax, see the help topic Global Search.

Working with Channels

SuiteSocial channels lets you categorize your posts and share them to specific groups of users. You can create a channel for your team members, where you can share posts that are relevant only to the people who can access the channel. Users who do not have access to the channel will not be able to see messages you post on the channel, even if they are subscribed to your profile.

Creating a Channel from the News Feed

To create a channel:

1. From the SuiteSocial news feed, click the channel selector, and then select **Create Channel**.
2. On the Create New Channel popup, provide the following details:

   - **Channel Name** — Enter a name for the channel.
   - **Auto Subscribe** — Check this box to automatically subscribe users to this channel.
   - **Allow Comments** — Check this box to enable users to comment on posts on this channel.

   For account administrators, provide the following details:

   - **Subsidiary** — Restrict channel access to users within the specified subsidiary. You can enter only one subsidiary.

     > **ⓘ Note:** This option is available only on One World accounts.

   - **Departments** — Restrict channel access to users within the specified departments. You can enter one or more departments.
   - **Locations** — Restrict channel access to users within the specified locations. You can enter one or more locations.
   - **Roles** — Enter the roles that can access this channel.
   - **Individuals** — Enter the names of users who can access this channel. The specified users will be automatically subscribed to the channel.
   - **Allowed Posters** — Enter the names of users who can post to this channel.

   For regular SuiteSocial users, provide the following details:

   - **Restrictions** — Check one or more option to restrict channel access to users within your department, location, subsidiary, and role.

     The option to restrict channel access to your department and location is available only if the **Department** and **Location** feature is enabled. If the feature is enabled, but a department and location has not been set on your account, you will not be able restrict channel access to your department or location. Contact your account administrator to enable or set your department and location.

> **(i) Note:** When the administrator enabled the **Show User Restriction Details** preference, the user's details will appear beside the restriction fields. For example, when the setting is enabled, the Department restriction setting will display the name of the department that the current user belongs to (e.g. Department: Finance).

- **Individuals** — Enter the names of users who can access this channel. The specified users will be automatically subscribed to the channel. Note that selecting an individual will remove the channel restrictions that you have defined.

> **(i) Note:** This option is available for regular SuiteSocial users with the Sales Manager role.

3. Click **Create**.

   The channel will be visible on the channel selector when you click **Expand Channels**.

Editing a Channel from the News Feed

You can view and subscribe to channels that are created by other users, if you have access to the channel. As a regular SuiteSocial user, you can edit only the channels that you have created. NetSuite account administrators can modify or delete any SuiteSocial channel. Account administrators modifying a user-created channel will see the

To edit a channel:

1. From the SuiteSocial news feed, click the channel selector.
2. Click Expand Channels, and then click the Edit icon next to the channel you want to modify.
3. On the Edit Channel popup, update the following details:
   - **Channel Name** — Enter a new name for the channel you are modifying.
   - **Auto Subscribe** — Check this box to automatically subscribe users to this channel.
   - **Allow Comments** — Check this box to enable users to comment on posts on this channel.

   For account administrators, provide the following details:

   > **(i) Note:** The Edit Channel popup may display fewer options if you are modifying a channel created by a regular SuiteSocial user.

   - **Subsidiary** — Modify subsidiary restrictions for this channel. You can enter only one subsidiary.

   > **(i) Note:** This option is available only on One World accounts.

   - **Departments** —Modify department restrictions for this channel. You can enter one or more departments.
   - **Locations** — Modify location restrictions for this channel. You can enter one or more locations.
   - **Roles** — Modify the roles that can access this channel.
   - **Individuals** — Modify the names of users who can access this channel. The specified users will be automatically subscribed to the channel.
   - **Allowed Posters** — Modify the names of users who can post to this channel.

   For regular SuiteSocial users, provide the following details:

   - **Restrictions** — Check one or more option to restrict channel access to users within your department, location, subsidiary, and role.

The option to restrict channel access to your department and location is available only if the **Department** and **Location** feature is enabled. If the feature is enabled, but a department and location has not been set on your account, you will not be able restrict channel access to your department or location. Contact your account administrator to enable or set your department and location.

> ⓘ **Note:** When the administrator enabled the **Show User Restriction Details** preference, the user's details will appear beside the restriction fields. For example, when the setting is enabled, the Department restriction setting will display the name of the department that the current user belongs to (e.g. Department: Finance).

- **Individuals** — Modify the names of users who can access this channel. The specified users will be automatically subscribed to the channel. Note that selecting an individual will remove the channel restrictions that you have defined.

> ⓘ **Note:** This option is available for regular SuiteSocial users with the Sales Manager role.

4. Click **Update**.

> ⓘ **Note:** Account administrators can delete a channel from the SuiteSocial Admin Setup Assistant. For more information, see Step 3: Set Up Channels.

Adding the SuiteSocial News Feed Portlet

The SuiteSocial News Feed displays news feeds that you subscribe to, automatic posts that your profile receives based on the configuration set up by your NetSuite administrator, and the status messages of colleagues you are following.

1. In the Settings portlet or in the top right corner of the page, click the **Personalize Dashboard** link.

2. In the Add Content panel that appears on the left side of the page, click **Custom Portlet** to add it to a default location on the page, or drag and drop content to add it to another location.

3. In the Custom Content portlet, hover over the dropdown arrow in the upper right corner, and then click **Set Up**.

   The Custom Content pop-up appears.

4. In the **Source** dropdown, select **SuiteSocial News Feed**.

5. Click **Save**.

   The SuiteSocial News Feed portlet is added to your dashboard.

After adding and setting up the SuiteSocial News Feed portlet, you can use it according to your needs. For more information, see Navigating the SuiteSocial News Feed.

> ⓘ **Note:** To avoid problems viewing the portlet, you should place the portlet on the right column.

Working with SuiteSocial Profiles

SuiteSocial profiles are automatically created for each user. You can personalize your SuiteSocial profile by clicking the Edit Profile icon on the news feed page.

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From the Edit Profile page, you can add the channels, colleagues, and record subscription types from which you will receive SuiteSocial posts. Posts and status messages of these entities are posted on your SuiteSocial News Feed. You can also specify how you want to receive email notifications of SuiteSocial posts. You can also modify tracked fields of SuiteSocial-enabled records as a user. You can select only those tracked fields relevant to your needs. For more information, read the following help topics:

- Adding Your SuiteSocial Profile Image
- Managing Subscriptions

Adding Your SuiteSocial Profile Image

You can add an image to your SuiteSocial profile so that the image is displayed with your profile name across SuiteSocial.

1. On the SuiteSocial News Feed page, click the Edit Profile icon.

2. On the Edit SuiteSocial Profile page, add your preferred image in the Image field in one of three ways:

   - If the image you want to add is already saved in the system, enter the file name in the field and press Tab. If you do not know the file name, click the double down arrows on the field and then click **List**. Select the file name for the image in the Choose Image dialog.

   - Upload a new image. Click the double down arrows on the field and then click **New**. On the File page, attach and save the image file to the correct folder.

   - Add an edited version of your current image file. Click the double down arrows on the field and then click **Edit**. Enter the changes on the File page and click **Save**.

3. On the Edit SuiteSocial Profile page, click **Save**.

Managing Subscriptions

To manage your SuiteSocial profile subscriptions, you can do the following procedures:

- Adding a Channel Subscription
- Adding a Colleague Subscription
- Adding a Record Subscription
- Adding a Related Record Subscription
- Adding a Related Transaction Subscription
- Adding a Saved Search Subscription
- Viewing Followed Records
- Viewing Tracked Fields
- Modifying Tracked Fields
- Viewing Auto Subscriptions

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Adding a Channel Subscription

Channels are categories of news feed posts. You can add a channel subscription to receive posts that belong to a specific channel in your SuiteSocial News Feed. Your NetSuite administrator sets up the channels you can subscribe to. For more information, see Step 3: Set Up Channels.

To subscribe to a channel from the SuiteSocial profile page:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.
2. In the **Subscriptions** subtab, click **My Channels**, if not already open.
3. In the **Channel** column, select the **News Feed Channel** from which you want to receive SuiteSocial posts.
4. In the **Email Digest** column, check the box if you want to receive an email summary of posts from the channel.
5. In the **Email Alerts** column, check the box if you want to receive an email notification every time a news feed is posted on the channel.

   > **Note:** You can reply to the notification email to comment on a post.

6. Click **Add**.
7. Click **Save**.

To subscribe to a channel from the SuiteSocial news feed:

1. In the Channels list, click **Expand Channels** to show the list of channels you are not currently subscribed to.
2. Click the toggle buttons next to the channel name to subscribe or unsubscribe from the channel.

   The selected channel is added to your Channels list.

To manage your subscription to the new channel, click the line for the channel in My Channels on the **Subscriptions** subtab of the Edit SuiteSocial Profile page.

Adding a Colleague Subscription

You can add a colleague subscription to receive posts and status updates that are made by a colleague in your SuiteSocial News Feed.

> **Note:** In the SuiteSocial News Feed, you cannot see posts for record changes made by colleagues to whom you are subscribed, unless you are also subscribed to that record.

To add a colleague subscription:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.
2. In the **Subscriptions** subtab, click **My Colleagues**.
3. In the **Colleague** column, select the colleague that you want to subscribe to.
4. In the **Email Alerts** column, check the box if you want to receive an email notification every time a post is made by your colleague.

   > **Note:** You can reply to the notification email to comment on a post.

5. Click **Add**.
6. Click **Save**.

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You can also add a colleague subscription directly on the SuiteSocial News Feed page or in the portlet. For more information, see Following and Searching for Colleagues from the News Feed.

To manage your subscription to the colleague, click the line for that colleague in My Colleagues on the **Subscriptions** subtab of the Edit SuiteSocial Profile page.

Adding a Record Subscription

You can add a record subscription to receive updates about that record based on changes made to a specific field. The updates are posted in your SuiteSocial News Feed after adding the record subscription.

To add a record subscription:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.

   The Edit SuiteSocial Profile page opens.

2. In the **Subscriptions** subtab, click **Auto Subscriptions**.

   All of the available automatic subscriptions such as record subscriptions, related record subscriptions, related transaction subscription, and saved search subscriptions are shown.

3. Under Record Subscriptions, select the record you want to subscribe to.

   > ⓘ **Note:** You can enter a full or partial keyword in the **Search** field to filter the list and locate the record subscription you need.

4. Click **Save**.

Adding a Related Record Subscription

You can add a related record subscription to receive updates about records that are related to a record type you are subscribed to. For example, you can add a subscription for all lead sources of your customer records. The updates are posted in your SuiteSocial News Feed after adding the related record subscription.

To add a related record subscription:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.

   The Edit SuiteSocial Profile page opens.

2. In the **Subscriptions** subtab, click **Auto Subscriptions**.

   All of the available automatic subscriptions such as record subscriptions, related record subscriptions, related transaction subscription, and saved search subscriptions are shown.

3. Under Related Record Subscriptions, select the related record you want to subscribe to.

   > ⓘ **Note:** You can enter a full or partial keyword in the **Search** field to filter the list and locate the related record subscription you need.

4. Click **Save**.

Adding a Related Transaction Subscription

You can add a related transaction subscription to receive updates about transactions that are related to a record type you subscribe to. For example, when you add a subscription for all sales orders you automatically subscribe to all transactions, such as item fulfillment, generated from sales orders. The updates are posted in your SuiteSocial News Feed.

To add a related transaction subscription:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.

   The Edit SuiteSocial Profile page opens.

2. On the **Subscriptions** subtab, click **Auto Subscriptions**.

   All of the available automatic subscriptions such as record subscriptions, related transaction subscriptions, related record subscriptions, and saved search subscriptions are shown.

3. Under Related Transaction Subscriptions, select the record you want to subscribe to.

   You can enter a full or partial keyword in the **Search** field to filter the list and locate the related record subscription you need.

4. Click **Save**.

With related transactions, your subscription to the record type is indicated on the record as an automatic subscription.

You automatically receive posts about transactions related to the record type you are following, but the related transaction record does not indicate that it is a followed record. You can manually follow the related transaction record. For more information, see Following a Record.

Adding a Saved Search Subscription

You can add a saved search subscription to receive a post when a record that meets the saved search criteria is updated. Compared to the saved search field in the record subscription, saved search subscription can stand alone. You use this subscription type if you do not have a direct link to a record type. For example, if you are a CEO with no direct link to a sales person, you could use a saved search subscription to get posts on record updates for a sales person. However, if you are a sales manager for a sales person, it is better to use a record subscription's saved search.

> (i) **Note:** You can only see saved search subscriptions that your profile has access to. For example, if you are a sales person, you would not see a saved search subscription based on employee records, because the standard sales rep role does not have access to employee records.

To add a saved search subscription:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.

   The Edit SuiteSocial Profile page opens.

2. In the **Subscriptions** subtab, click **Auto Subscriptions**.

   All of the available automatic subscriptions such as record subscriptions, related record subscriptions, related transaction subscriptions, and saved search subscriptions are shown.

3. Under Saved Search Subscriptions, select the saved search you want to subscribe to.

   You can enter a full or partial keyword in the **Search** field to filter the list and locate the saved search subscription you need.

4. Click **Save**.

Viewing Followed Records

You can view the list of SuiteSocial records that you manually chose to follow.

To view followed records:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.

2. In the **Subscriptions** subtab, click **My Followed Records**.

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3. In the **Record** column, click the record name to view the record details. The **Status** column indicates whether or not you are currently subscribed to the record.

> ⓘ **Note:** Links are shown as underlined text.

Viewing Tracked Fields

You can view the list of company-level tracked fields that your NetSuite administrator has set for all SuiteSocial-enabled records.

> ⓘ **Note:** Tracked field apply only to related record subscriptions. Related transaction subscriptions are automatically created. For more information, see Adding a Related Transaction Subscription.

To view tracked fields:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.
2. In the **Subscriptions** subtab, click **My Tracked Fields**.

   The number of tracked fields for every record is shown in the **Tracked fFields** column.
3. To view the tracked fields for a record, click **Edit** next to the record.

Modifying Tracked Fields

You can modify the tracked fields of SuiteSocial-enabled records to select only those that are relevant to your needs.

> ⓘ **Note:** A tracked field only applies to related record subscriptions. Related transaction subscriptions are automatically created. For more information, see Adding a Related Transaction Subscription.

To modify tracked fields:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.
2. In the **Subscriptions** subtab, click **My Tracked Fields**.

   The number of tracked fields for every record is shown in the **Tracked Fields** column.
3. To modify the tracked fields for a record, click **Edit** next to the record.
4. Select or clear the fields you want.

   > ⓘ **Note:** If you exclude a tracked field, you may no longer be notified when there are updates to the field. For more information on tracked field notifications, see SuiteSocial Posts Display Rules. If you clear all tracked fields for a record, a pop-up appears warning you that you will not receive any posts for the record type. However, the tracked fields will still be listed under My Tracked Fields.

5. Click **Submit**.
6. On the Edit SuiteSocial Profile page, click **Save**.

Viewing Auto Subscriptions

You can view all of the automatic subscriptions set for SuiteSocial-enabled records such as record subscriptions, related record subscriptions, related transaction subscriptions, and saved search subscriptions.

To view auto subscriptions:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.

2. In the **Subscriptions** subtab, click **Auto Subscriptions**.

   All of the available automatic subscriptions such as record subscriptions, related record subscriptions, related transaction subscriptions, and saved search subscriptions are shown.

3. To locate a specific subscription, enter a full or partial keyword in the **Search** field.

   The list automatically refreshes to show only the relevant subscriptions based on the search keyword provided.

Modifying Email Notification Settings

You can modify email notifications settings depending on the posts you want to be notified about, and how and when you want to receive the notification.

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.

2. Click the **Email** subtab.

3. Enable the following notification options to specify when you will receive email alerts:

   > ⓘ **Note:** Except for digests, alerts on status change, and alerts on subscribed record, you can reply to the notification emails to comment on a post.

   - **Digest** — Receive an email summary of posts in your SuiteSocial News Feed.

     > ⓘ **Note:** You get email digests in addition to the channel-specific digest that you specify when adding a channel subscription.

   - **Weekend Digests** — Receive an email summary of posts in your SuiteSocial News Feed during weekends.
   - **Alert on Comment** — Notifies you every time someone comments on your posts.
   - **Alert on Private Message** — Notifies you every time you receive a private message from a colleague.
   - **Alert on Status Change** — Notifies you every time a colleague you follow changes their status messages.
   - **Alert on Subscribed Record** — Notifies you every time an update occurs on records you follow. For more information, see Adding a Record Subscription.
   - **Alert on Mention** — Notifies you every time colleagues mention you in a post.

4. In the **Time of Day** column, enter the time (in 24:00 or hh:mm AM/PM format) when you want to receive the email digests, and then click **Add**.

   > ⚠ **Important:** You will not receive any digests if you leave the Time of Day list empty.

5. Click **Save**.

Working with Records in SuiteSocial

With records in SuiteSocial, you can do the following procedures:

- Following a Record

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- Viewing Record Posts
- Posting a Message and Adding Comments to a Record
- Deleting a Record Post

Following a Record

You can follow records that have been enabled for SuiteSocial, to receive record updates. Posts made in the record page or any changes to the record will be visible on your SuiteSocial news feed. Your NetSuite account administrator sets up which types of records you can follow or subscribe to manually. For more information, see Step 4: Enable Records.

To follow a record:

1. Open the record that you want to follow.

2. If a record is enabled for SuiteSocial, a Follow text is visible next to the record name. Click **Follow** to subscribe to the record.

You will receive all posts to the record in your SuiteSocial News Feed. To manage your followed records, go to Edit SuiteSocial Profile page > Subscriptions > My Followed Records. For more information, see Viewing Followed Records.

> **ⓘ Note:** With related transaction subscriptions, you automatically receive posts about transactions related to the record type you are following but the related transaction record does not indicate that it is a followed record.

To stop following a record:

1. On the SuiteSocial News Feed page or in the portlet, click the Edit Profile icon.

2. In the **Subscriptions** subtab, click **My Followed Records**.

3. In the **My Followed Records** subtab, click **Stop following** next to the name of the record.

   All changes to the field that you select for the record type will generate SuiteSocial news feed posts. The posts will be displayed on the news feeds of users who are subscribed to the record type.

> **ⓘ Note:** You can also stop following a record by opening the record itself and clicking **Stop following** next to the record name. You can do this for all records you follow except for record types you follow under a related transaction subscription. To stop following related transaction records, go to the **Auto Subscriptions** subtab of your Edit SuiteSocial Profile page and clear the box for the record type.

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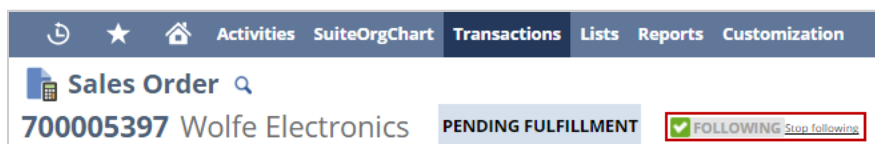
Viewing Record Posts

You can view record posts from your SuiteSocial news feed or from the record page. To view record posts from the record page, open the record, and then click the **SuiteSocial** subtab. From the SuiteSocial subtab, you can do the following:

- View messages that you, and other followers, posted on the record page.

- Post a message on the record. For more information, see Posting a Message and Adding Comments to a Record.

- Delete a message that you posted on the record. For more information, see Deleting a Record Post.

- Follow colleagues who are subscribed to the record. To do this, click the colleague's name, and then click **Follow**.

> ⓘ **Note:** All messages posted on a record's SuiteSocial subtab, along with their comments, can also be viewed on the SuiteSocial News Feed page and portlet. For more information, see Viewing and Deleting News Feed Posts.

Posting a Message and Adding Comments to a Record

Messages that you post on a record page can also be viewed by other colleagues who subscribe to the record. Record posts can be viewed in the Record Changes channel and in channels where users chose to post messages that are linked to records. For more information about enabling this SuiteSocial functionality on records, see Step 4: Enable Records.

1. Open the record that you want to post a message to, and click the **SuiteSocial** subtab.

2. On the **SuiteSocial** subtab, enter your message in the composition area next to your profile image.

   - To mention colleagues within your message, or tag other records, type **@** followed by the user name or the global search syntax in NetSuite. For example, you can enter **@John** or **@emp:John** to bring up employee search results.

   - To add a file to your post, drag and drop a file to the composition area, or click the file upload icon.
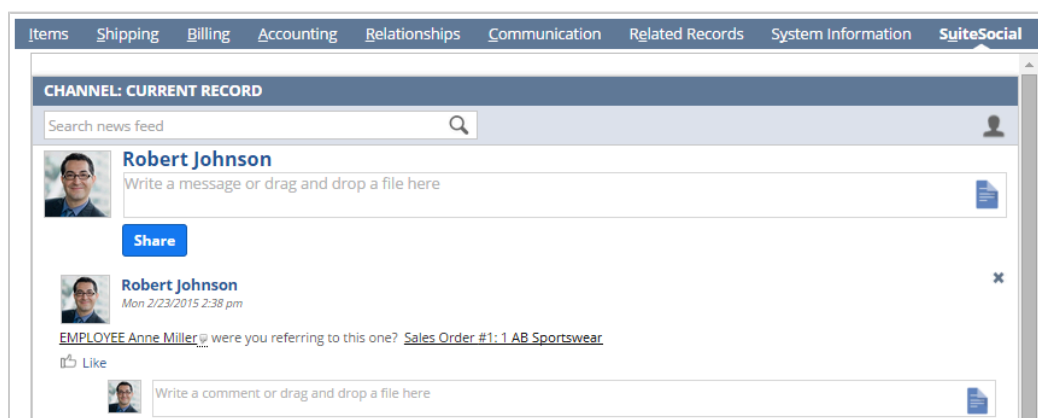
   Note the label **Channel: Current Record** is displayed on top, indicating that you are posting a message on the record you have opened.

3. Click **Share**.

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Your message shows up right at the top of the news feed. The SuiteSocial News Feed page also refreshes with your post.

To delete a record post, see Deleting a Record Post.

4. To add a comment to a record post, enter your comment on the message composition area below the post, and then click **OK**.

Deleting a Record Post

> ⓘ **Note:** You cannot delete system-generated posts and posts by other users.

You can delete a record post you created, either on the **SuiteSocial** subtab of the record or on the SuiteSocial News Feed page or portlet. To delete a record post, click the **X** icon in the upper-right corner, and click **Yes** in the confirmation dialog.

To post a message on a record or enter comments on record posts, see Posting a Message and Adding Comments to a Record.

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