



Working with NetSuite Records Timeline

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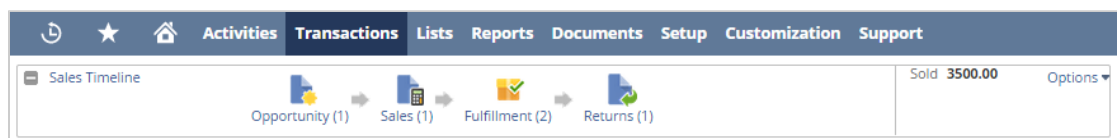
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Chapter 1 Working with NetSuite Records Timeline (Beta)

NetSuite Records Timeline (Beta) offers a visual representation of your records in NetSuite. You can use NetSuite Records Timeline, for example, to track your sales transaction workflow. You can customize your timeline to include the records you often use and organize them in groups that make sense for your business.

Note: The latest release of this SuiteApp includes support for custom and other standard NetSuite records, which enables you to create a timeline using any record type. The SuiteApp, previously named Transaction Timeline, was renamed to NetSuite Records Timeline to reflect this update.

The timeline bar has two components:



- **Timeline** – Shown on the left of the timeline bar, this displays the configured groups, the related transactions or records, and the number of records within each group.
- **Summary** – Shown on the right of the timeline bar, this displays the summary information as configured by your administrator. The information you see will depend on the access granted to your role.

Setting General User Preferences

You can define custom NetSuite Records Timeline preferences for your account. From the Set Preferences page, you can configure the following:

- Specify the default location of the timeline bar and how it is displayed when viewing a record page
- Enable or disable the NetSuite Records Timeline tutorial
- Enable or disable NetSuite Records Timeline in your account

To set General User preferences:

1. Go to Home > Set Preferences, and then click the **Custom Preferences** subtab.
2. In the NetSuite Records Timeline section, select a **Timeline Location** from the list.

- **Top (Inline)** — Select this option to display the timeline bar at the top of the page.
- **Bottom (Inline)** — Select this option to display the timeline bar at the bottom of the page.
- **Bottom (Docked)** — Select this option to dock the timeline bar at the bottom of the page.

Note: If you do not specify a timeline location, the SuiteApp will use the default location configured by your account administrator.

You can also change the timeline location from the **Options** menu on the timeline bar.

3. Check or clear the **Suppress Tutorial** box to enable or disable the NetSuite Records Timeline tutorial.

Note: You can also view the tutorial by clicking the **Help** link from the **Options** menu on the timeline bar.

4. Check or clear the **Enable NetSuite Records Timeline** box to enable or disable NetSuite Records Timeline on all record pages.
5. Check or clear the **Collapse NetSuite Records Timeline** box if you want to display the timeline bar in a Collapsed or Expanded form when you load a record page.

The expanded view loads the timeline bar immediately; whereas the collapsed view hides the timeline bar.

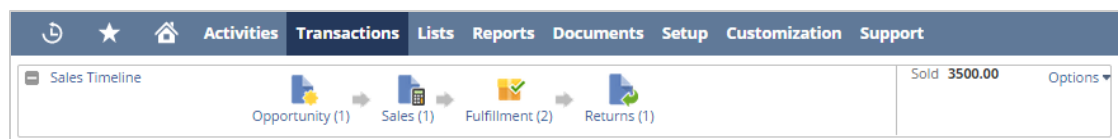
6. Click **Save**.

Using the Timeline Bar

When you have successfully completed the setup procedure, the Timeline bar will be visible on supported record pages in View or Edit mode. The timeline is populated according to the defined record groups.

Note: The timeline bar is not displayed on the following records: Customer Payment, Customer Refund, Bill Credit, Bill, and Vendor Payment.

A tutorial shows you how NetSuite Records Timeline works. To go through the tutorial, click the navigation links at the bottom of the tutorial window.



Timeline groups with existing records appear in the timeline. The number of records within each group is shown next to the Group Name.

Viewing a Record from the Timeline Bar

To view a Record from the Timeline bar:

1. Open a record in View or Edit mode.
2. From the timeline bar, click a group icon to view the records for the group.
A popup report lists transactions and related records belonging to the group.
3. To change the order of the columns in the report, drag and drop a Column Label to the desired location.

NetSuite Records Timeline - Fulfillment							
ITEM FULFILLMENT							
Number	Date	Period	Tax Period	Type	Name	Account	Amount
2	2/4/2015	Jan 2014		Item Fulfillment	1 Timeline Company		.00
ITEM RECEIPT							
Number	Date	Type	Tax Period	Name	Account	Amount	
1	2/4/2015	Item Receipt		1 Timeline Company		.00	

4. From the **Number** column, click the numbered link that corresponds to the transaction that you want to view.

The transaction page opens in a new window.

Note: You will not be able to view the page if you do not have access to the record.

5. Click **Close** to go back to the main transaction page.

Changing the Active Timeline

To change the Active Timeline:

1. Open a record in View or Edit mode.
2. From the timeline bar, click the **Options** menu.
3. Select the timeline type that you want to display on the timeline bar.

The timeline bar reloads to display the selected timeline type.

Note: The timeline types are arranged according to the specified priority.