

Dashboards Guide



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Table of Contents

Dashboards Overview	1
Dashboard Portlets	2
Portlet Types Table	2
Dashboard Personalization	6
Dashboard Layouts	7
Adding a Portlet to a Dashboard	7
Arranging Dashboard Portlets	9
Setting Up Dashboard Portlet Content	9
Calendar Portlets	11
Custom Portlets	13
Custom Search Portlets	23
KPI Meter Portlets	24
KPI Scorecard Portlet	24
Key Performance Indicators Portlet	25
List Portlets	25
Quick Add Portlet	26
Quick Search Portlet	28
Project Tasks Portlets	29
RSS/Atom Feed Portlets	29
Reviewing Recent Records	31
Setting Up Reminders	32
Report Snapshot Portlets	41
Search Form Portlet	42
Settings Portlet	42
Shortcuts Portlet	43
SuiteApp Portlets	45
Tasks Portlet	46
Trend Graph Portlets	46
Printing and Exporting Dashboard Content	46
Customer Dashboards	47
Key Performance Indicators Overview	49
Setting Up the Key Performance Indicators Portlet	49
Viewing Key Performance Indicator Data	51
Setting Up KPI Comparisons	53
Highlighting KPIs	54
Standard Key Performance Indicators Table	55
KPI Meters	63
Trend Graphs	65
Setting Up Popup Trend Graphs	69
Setting Up Trend Graph Portlets	72
Custom KPIs	74
Selecting an Existing Search to be a Custom KPI	75
Creating a New Search to be a Custom KPI	76
Adding a Custom KPI to the Key Performance Indicators Portlet	76
Using a Custom KPI in a KPI Scorecard	77
KPI Scorecards Overview	79
Enabling the KPI Scorecards Feature	80
Adding a KPI Scorecard Portlet to a Dashboard	80
Creating a KPI Scorecard	81
Entering Basic Scorecard Information	82
Defining KPI Scorecard Comparisons	83
Defining KPI Scorecard Formulas	83
Defining KPI Scorecard Date Ranges or Periods	88

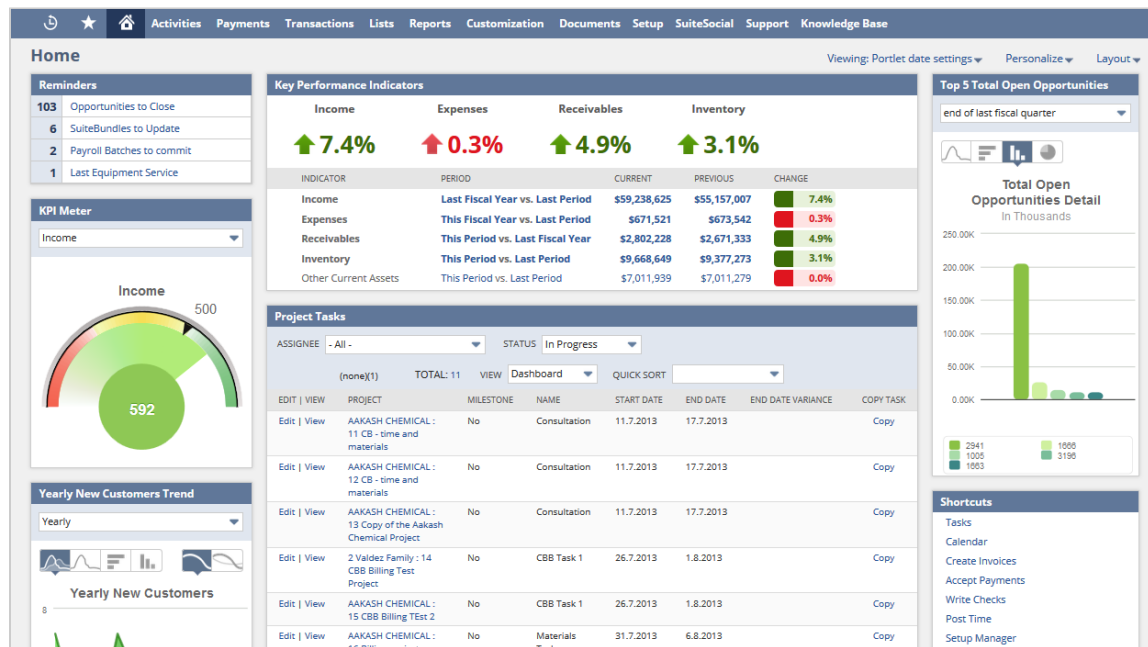
Highlighting KPI Scorecard Results	99
Sharing a Custom KPI Scorecard	100
Editing a KPI Scorecard	101
Financial Ratios Scorecard	101
Financial Ratios Scorecard Formulas	102
Report Snapshots Overview	104
Adding a Report Snapshot Portlet	105
Standard Report Snapshots Table	106
Setup Options for Comparative Sales Report Snapshots	110
Creating Custom Report Snapshots	112
Deleting a Custom Report Snapshot	113
Reports Available for Custom Report Snapshots	113
Sales Management Snapshots	115
Setting Up a Report Snapshot Portlet	116
Publishing Dashboards Overview	119
Publish Dashboards Permission	120
Publishing a Dashboard	121
Assigning Published Dashboards to Users	123
Restricting Users' Dashboard Personalizations	124
Applying Changes to Published Dashboards	124

Dashboards Overview

You can create a unique dashboard setup to ensure maximum efficiency and ease when you use NetSuite. For each user, NetSuite displays a variable set of tabbed pages, called a **center**. The center is based on the user's assigned role. Each NetSuite center provides the pages and links that users with the same role need to do their jobs.

Most tabbed pages of each center display a collection of real-time data relevant to the page and to the role of the user viewing the page. This collection, called a **dashboard**, provides a visual workspace that gives users instant, uninterrupted access to accurate information. A dashboard is available not only on your home page, but on every page you see in NetSuite except the Documents, Setup, and Customization pages. On your dashboards, you can view the data you need to make decisions, and edit records.

Dashboard content is displayed in a variety of **portlets**, dynamic data display windows. Some portlets provide direct access to raw data, and others display data that has been synthesized into critical business metrics, such as key performance indicators (KPIs), performance scorecards, trend graphs, and report snapshots. Other portlets enable you to display data from website RSS feeds.



For each page, NetSuite provides a default dashboard configuration that can be changed to meet individual users' business needs. Administrators can personalize the dashboards for one or more pages and **publish** them to a group of users so that they all see a consistent interface. The dashboards that users see depend on their roles. Administrators can choose whether to give individual users the ability to personalize their own dashboards further.

To set up dashboards, you need to understand the following:

- The different types of content available. See [Dashboard Portlets](#).
- How to modify a default dashboard to include the content you need. See [Dashboard Personalization](#).
- How to publish dashboards to groups of users. (You must have the Publish Dashboards permission for this task.) See [Publishing Dashboards Overview](#).

Note: NetSuite dashboards include functionality provided by HighCharts JS, which is software owned by and licensed through Highsoft Solutions AS.

Dashboard Portlets

NetSuite offers many types of content for dashboard portlets. To see the content available on a particular page, click the Personalize Dashboard link in the Settings portlet or the Personalize link in the upper right corner of the page. The Personalize Dashboard panel displays the content that you can add to your dashboard on tabs for Standard Content, Report Snapshots, and Trend Graphs. The portlets that you are currently using appear on the Currently Used tab.

Custom dashboard pages have the same limits on portlets as the standard Home page.

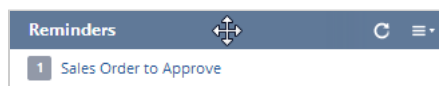
For descriptions of dashboard content, see [Portlet Types Table](#).

Using portlets


Portlet controls are hidden until you move your pointer over the portlet.

If a dashboard contains a portlet that is extremely slow to load, the first time the portlet opens, NetSuite may display a popup suggesting that you minimize the portlet to speed dashboard loading time.

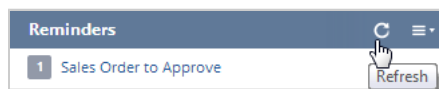
- To minimize a portlet, click its title bar. When you move your pointer over the title bar, it changes to crossed arrows as shown.



Click the title bar again to expand the portlet's content.

Portlets with content that is calculated from current data include a Refresh icon  on the right of the title bar.

- Click the icon to refresh the portlet content and ensure it includes the latest data.




Portlet Types Table



The following table describes content available for display in dashboard portlets, and notes how you can set up content after adding portlets to your dashboard.


Note: Not all content is available on all pages. To see the content that is available for a specific page, click the Personalize link in the upper right corner of the page or the Personalize Dashboard link in the Settings portlet. The Personalize Dashboard panel lists the content you can add. Portlets have task links, in some cases, including a Set Up link, available under icons in their upper right corner. For details, see [Setting Up Dashboard Portlet Content](#).


For most content, you can display one portlet per dashboard on a standard NetSuite tab. The table explicitly notes content that can be displayed in multiple portlets. Custom NetSuite tabs may have multiple portlets with other content as well.

Content	Description
Account Reconciliation Summary	<p>Lists your bank and credit card accounts and displays the key data for matching and reconciliation activities.</p> <p>Information for each account includes the currency, GL account balance, last reconciled balance, last reconciled date, bank (imported) statement balance, bank (imported) statement date, and the number of items that require matching. To view the Bank Register Report for one of the listed accounts, click the hyperlinked account name.</p> <p>If your user role has the permissions for the Reconcile Account Statement page, this portlet is on your dashboard by default. If you remove it, the portlet is available in the Personalize Dashboard panel.</p> <p>For details on account reconciliation, see the help topic Account Statement Matching and Reconciliation.</p>
Calendar	<p>Lists activities for a selected period ordered by date and time, with links to drill down into individual activity records.</p> <p>In the portlet, you can select between a daily, weekly, monthly, or agenda view. You can choose to display your own calendar or a public calendar for another entity within the organization.</p> <p>You can click the Set Up menu option for the portlet to display a popup where you can define the types of activities to display in the calendar.</p> <p>For more details, see Calendar Portlets.</p>
Custom Portlet	<p>(Can display up to six.)</p> <p>Shows results from a portlet SuiteScript, which can be lists, data entry forms, free-form HTML, or links to external data.</p> <p>In the portlet, click Set Up to select the source file for the SuiteScript results.</p> <p>For information about creating scripts, see the help topic Portlet Scripts.</p>
Custom Search	<p>(Can display up to six on the Home page.)</p> <p>Shows results from a saved search.</p> <p>In the portlet, click Set Up to select the saved search, specify a custom title for the portlet, the number of results to display, whether to drill down into search results in the portlet or on a new page, and, if the Inline Editing feature is enabled, whether to enable inline editing of search results.</p> <div data-bbox="456 1150 1367 1291" style="border: 1px solid #0070C0; padding: 10px; margin-top: 10px;"> <p> Note: When placed in the right or left columns of a dashboard, custom search portlets display only the first 4 results columns of the saved search. When placed in the center column, they display the first 9 results columns. Custom search portlets also include New, Edit, and View columns with links for each result record.</p> </div> <p>For more details, see the help topic Displaying Saved Search Results in Dashboard Portlets.</p>
KPI Meter	<p>(Can display up to three.)</p> <p>Shows up to three graphical meters of key performance indicator (KPI) data.</p> <p>In the portlet, select a KPI to display from the dropdown list. Click Set Up to select date range(s), highlighting, and comparison options. You also can click menu options to print the KPI meter or download it to a PNG, JPG, PDF, or SVG file.</p> <p>Choices of KPIs for a meter are limited to the KPIs displayed in the dashboard's Key Performance Indicators portlet, plus the following: Actual vs. Forecast, Actual vs. Quota, and Forecast vs. Quota.</p> <p>For more information, see KPI Meters.</p>
KPI Scorecard	<p>Shows a performance scorecard with comparisons of selected key performance indicator (KPI) data.</p> <p>In the portlet, click Set Up to select a KPI Scorecard and layout options.</p> <p>For more information, see KPI Scorecards Overview.</p>
Key Performance Indicators	<p>Shows key business metrics. These metrics are summary data from reports or saved searches for selected date ranges, with options to show comparisons between date ranges and to highlight results not meeting defined thresholds.</p>

Content	Description
	<p>In the portlet, click Refresh to refresh all KPIs, or click the Refresh icon next to an individual KPI to refresh one at a time. If available, click the Trend Graph icon next to a KPI to view a popup trend graph of KPI data.</p> <p>Click Set Up to select standard KPIs or custom KPIs based on custom saved searches, define comparison and highlighting options, and define the appearance of popup trend graphs.</p> <p>For more information, see Key Performance Indicators Overview.</p>
Links	<p>Shows links to pages that NetSuite has defined as related.</p> <p>This portlet is available on the Activities, Cases, Customers, Lists, Reports, and Transactions pages.</p> <p>Unlike other portlets, which are column-oriented and sorted top to bottom, the Links portlet is row-oriented and sorted left to right.</p>
List	<p>Shows a list of records of a selected type, with links to view, and if you have permission, to edit, individual records. Shows 9 columns when placed in the center column of the dashboard; shows 4 columns when placed in the right or left column.</p> <p>In the portlet, click Set Up to select a type of record and the number of records shown. If the Inline Editing feature is enabled and you have permission, you can edit records directly in the portlet. See the help topic Using Inline Editing.</p> <div> <p>Note: On some tabs, the available List portlets are configured to show predefined types of records. For example, the Activities page offers Tasks and Phone Calls list portlets.</p> </div>
My Login Audit	<p>Shows information about your login activity. You can display the My Login Audit portlet on your dashboard to track your previous successful login, your previous failed login, the IP address associated with your login activity, the date when your password will expire, and other login information.</p> <div> <p>Note: The date and time displayed in the My Login Audit portlet is based on the Time Zone preference you set on the General subtab at Home > Set Preferences. For more information, see the help topic Setting General Preferences.</p> </div> <p>For more information, see the help topic My Login Audit Portlet.</p>
New Release	Shows a summary of new features from the latest release of NetSuite, with links to more detailed descriptions.
Phone Calls	<p>Shows a list of upcoming phone calls, with links to view, and if you have permission, to edit, individual records.</p> <p>In the portlet, select a view and a sorting method, and click Set Up to define the number of phone calls shown.</p> <p>If the Inline Editing feature is enabled and you have permission, you can edit records directly in the portlet list.</p>
Project Tasks	<p>(Available when the Project Management feature is enabled. To learn how to enable Project Management, see the help topic Enabling Project Features.)</p> <p>This portlet is available on the Projects tab.</p> <p>Shows a list of project tasks with links to view, and if you have permission, to edit, individual records. Shows project tasks assigned to you and other project resources.</p> <p>In the portlet, select a view and a sorting method. Click Set Up to define the number of tasks shown.</p> <p>For more information, see the help topic Tasks and Project Tasks Portlets on Your Dashboard.</p>
Quick Add	<p>Shows a form where you can quickly add records of a selected type.</p> <p>In the portlet, click Set Up if you want to change the type of records to be added. For more information, see Quick Add Portlet.</p>
Quick Search	Shows a form where you can quickly search for records of a selected type, using one selected filter field and entered keywords.

Content	Description
	In the portlet, click Set Up to define the type of records to search, then enter keywords in the portlet's text box and select a field name from the Search For dropdown list. For more information about Quick Search, see the help topic Quick Search Portlet .
RSS/Atom Feed	(Can display up to two.) Shows RSS or Atom feed URL content, from an external website or HTML document. In the portlet, click Set Up to select display options and a URL. NetSuite provides a number of standard RSS feed URLs, or you can choose Custom and enter another URL. For more information, see RSS/Atom Feed Portlets .
Recent Records	Shows a list of records that you have recently created, modified, or viewed. In the portlet, click the record to view it. If you have permission, an Edit link is also available. You can click it to open the record in Edit mode. <div>  Important: Recent record links are also listed in a menu under the clock icon, to the left of the Home tab on every NetSuite page. </div> For more information, see Reviewing Recent Records .
Recent Reports	(Available on the Reports tabbed page.) Shows a list of reports that you have recently created, modified, or viewed. In the portlet, click the report name to view the individual report.
Reminders	Shows important tasks of selected types, usually that are past due or soon due to be completed. In the portlet, click Set Up to select types of reminders and to define the number of days in advance that reminders should be shown. Click on a reminder to go to the page where action needs to be taken. For more information, see Setting Up Reminders .
Report Snapshots	(Can display up to 10.) Each added portlet provides a graphical or list summary of a selected standard or custom report's data, with a link to view the underlying report. In the portlet, you can select a date range for data and click thumbnails to choose among chart types for graphical data. You can click Set Up to select the type of display and other layout options, including chart themes. You also can click menu options to print the report snapshot chart, download it to a PNG, JPG, PDF, or SVG file, or view the underlying report results. Report snapshot list text truncates at 25 characters when the report snapshot portlet is in the left or right dashboard column. To avoid this truncation, place the portlet in the middle column. Report snapshot list amounts are rounded to the nearest whole number and do not display decimal places. For more information, see Report Snapshots Overview .
Saved Searches	Shows the top ten saved searches in your account, including their execution time and the number of users who have accessed the search during a specified period. In the portlet, you can sort the searches that are displayed according to the most requested, most timeouts, most users, or highest execution time. For more information, see the help topic Using the Saved Searches Portlet .
Scheduler	(Available on the Activities page.) Shows an interface where you can view others' schedules and add activities. <div>  Note: This portlet cannot be removed or modified. </div> In the portlet, you can select the date and use the View Group dropdown menu to select others' schedules. Click the buttons to create new events, add invitees or resources.
Search Form	Shows a form to search for records of a selected type. Filter fields are based on system-defined defaults or a custom search form that you defined as preferred.

Content	Description
	<p>In the portlet, click Set Up to select the search form to be used. Click Full Search to switch to the default search page for the selected record type. Click Edit to open the definitions page for the selected search form and make edits.</p> <p>See the help topic Adding Personalized Search Forms to NetSuite Pages.</p>
Settings	<p>Shows links to user-level setup tasks.</p> <div style="border: 1px solid #f0e68c; padding: 10px; margin: 10px 0;">  Important: The contents of this portlet are system-defined. This portlet cannot be removed or modified. </div> <p>For more information, see Settings Portlet.</p>
Shortcuts	<p>Shows links to selected pages, so you can navigate quickly to frequently used pages.</p> <p>In the portlet, click Set Up to reorder the listing of existing shortcut links or click New Shortcut to add a shortcut, if you know the URL of the page. If you do not know the URL, go to that page and click More > Add to Shortcuts in the upper right corner of that page.</p> <p>For more information, see Shortcuts Portlet.</p>
Tasks	<p>Shows a list of upcoming CRM tasks assigned to you, with links to view, and if you have permission, to edit, individual records.</p> <p>In the portlet, select a view and a sorting method, and click Set Up to define the number of tasks shown.</p> <p>For more information, see the help topic Tasks and Project Tasks Portlets on Your Dashboard.</p>
Trend Graphs	<p>(Can display up to 5.)</p> <p>Shows a chart of key performance indicator (KPI) data with a time-based X axis.</p> <p>In the portlet, click thumbnails to choose among different chart types. You also can change the graph's X axis scale by selecting different time intervals from the dropdown list. Click Set Up to select a KPI to be graphed and layout options, including chart themes. You also can click menu options to print the trend graph chart or download it to a PNG, JPG, PDF, or SVG file.</p> <p>For more information, see Trend Graphs.</p>

 **Note:** You can set chart theme preferences that define the default look and feel for dashboard charts, including report snapshots and trend graphs. The Chart Theme preference sets the shape and colors for chart data. The Chart Background preference sets the display behind the data. See the help topic [Setting Preferences for Appearance](#).

Dashboard Personalization

NetSuite provides a default set of dashboard portlets for each tab in each center. Most default dashboard configurations can be personalized. The Settings portlet and a few other portlets are required on many dashboards and cannot be removed.

You may want to personalize only your home page dashboard, or you may want to change dashboards on other pages that you use frequently. In addition to changing page content, you can go to Home > Set Preferences to set personal preferences such as color scheme that apply to all pages. For information, see the help topic [Setting Personal Preferences](#).

If your administrator has published a dashboard for one of your NetSuite tabs, you may not be able to personalize that page's dashboard yourself. If the published dashboard is in Locked mode, you cannot make any changes to its content. If the published dashboard is in Add/Move Content mode, you can add or move portlets but you cannot remove portlets from the dashboard. However, you can still set personal preferences.



You can choose to use one, two, or three columns in a dashboard. The minimum required screen width size when using a three-column layout is 1400 pixels. For more information, see [Dashboard Layouts](#).

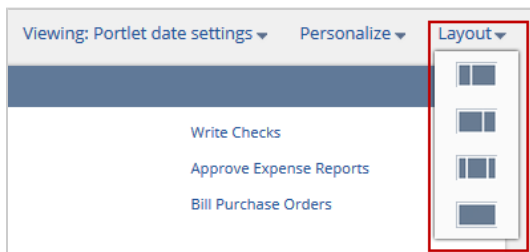
If you are an administrator, you can personalize your dashboard and then share it with users whose roles share your center. For information, see [Publishing Dashboards Overview](#).

- [Adding a Portlet to a Dashboard](#)
- [Setting Up Dashboard Portlet Content](#)
- [Arranging Dashboard Portlets](#)
- [Selecting an Existing Search to be a Custom KPI](#)

The Viewing link at the top right of the home page opens a popup window where you can select the Date Range for all your portlet content at one time. If you use multi-book accounting, you can also select the Accounting Book in this window. When you close the popup window, the link changes to display your viewing options.

Dashboard Layouts

You can choose among four layout types for every page that supports dashboards. Select your preference from the Layout dropdown list in the upper right of the page.



The available layout options are as follows:

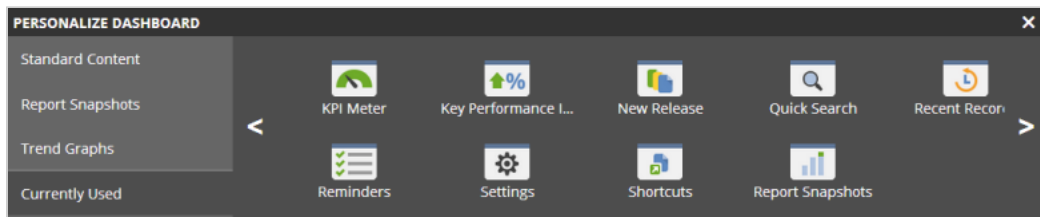
- Two-column, narrow on the left.
- Two-column, narrow on the right.
- Three-column, wide in the middle. For three-column layouts, the minimum screen width is 1400 pixels.
- One-column.

Adding a Portlet to a Dashboard

You can add a portlet to a dashboard at any time, unless your administrator has published that dashboard in Locked mode. If a dashboard is locked, you cannot personalize it by adding or removing portlets.

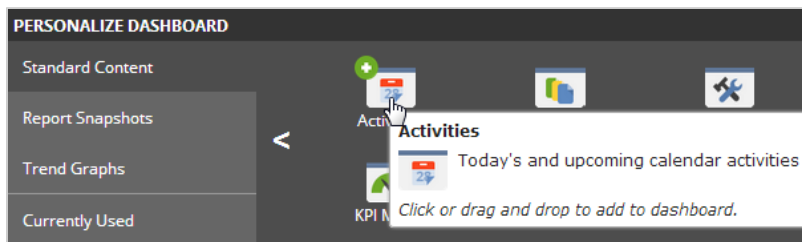
To add a portlet to a dashboard:

1. Click the **Personalize Dashboard** link in the Settings portlet or the **Personalize** link in the top right corner of the page. The **Personalize Dashboard** palette opens at the top of the page.



The portlets that already appear on your dashboard are shown when you click the **Currently Used** tab.

2. In the other tabs, click a portlet icon to add it to the top the page. The portlet automatically selects the column with the width that is best suited to its content. If you prefer, you can drag the portlet to a specific location.
 - The available portlet tabs are **Standard Content**, **Report Snapshots**, and **Trend Graphs**. You may not have permission to add portlets from every tab.
 - Rest your pointer over a portlet icon to see popup help.



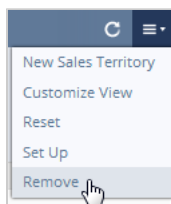
- To learn more about portlet types, see [Portlet Types Table](#) and [Dashboard Portlets](#).
- For information about Report Snapshots, see [Report Snapshots Overview](#).
- For information about Trend Graphs, see [Trend Graphs](#).

After you have added a portlet, you can modify its contents and layout and move it to another location on the dashboard. For information, see [Setting Up Dashboard Portlet Content](#) and [Arranging Dashboard Portlets](#).

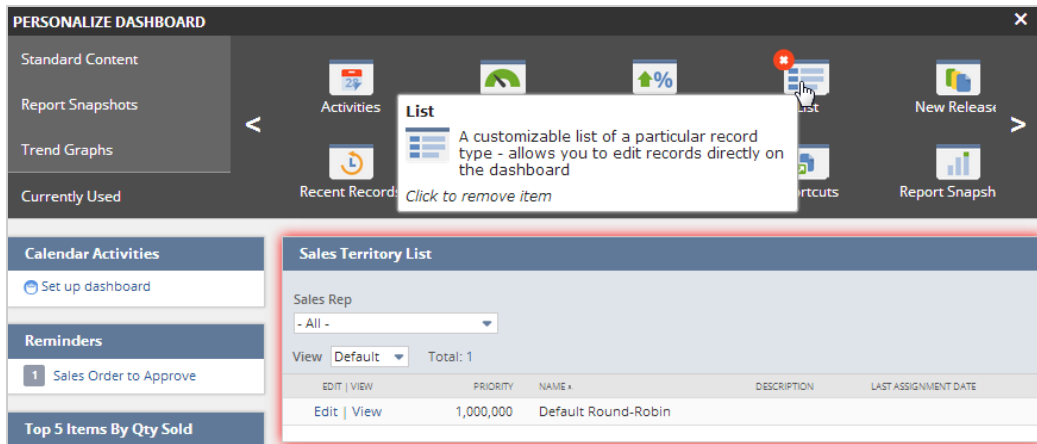
To delete a portlet from a dashboard:

There are two ways to remove portlets:

- Click **Remove** in the portlet menu.



- Click the portlet icon in the **Currently Used** tab of the Personalize Dashboard palette. As you move your pointer over the portlet icons, the corresponding portlet on your page is outlined in red.



Note: If you remove an Activities, Reminders, Key Performance Indicators, or Report Snapshot portlet from your home page, alert emails no longer include information from the removed portlet. For more information, see the help topic [Setting Personal Preferences](#).

Some portlets cannot be removed from a dashboard. One of these is the Settings portlet. Your administrator can also prohibit you from deleting a portlet.

Arranging Dashboard Portlets

You can arrange the portlets on your dashboard to best fit your needs. You can move portlets up or down and from one column to another. For more information on Dashboard Layouts, see [Dashboard Layouts](#).

To move a portlet on the dashboard:

1. Move your pointer to the title of the portlet.
2. When the pointer changes to crossed arrows, drag the portlet to its new location.

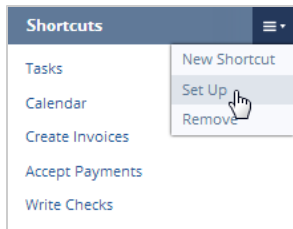
Portlet content may change if you move a portlet from a wide column location to a narrow one.

- The Key Performance Indicators portlet displays more data and options when it is placed in the wide column than when in a narrow column. For more details, see [Setting Up the Key Performance Indicators Portlet](#).
- Custom search and list portlets display only the first 4 results columns when they are placed in a narrow column. When placed in the wide column, they display the first 9 results columns.
- Report snapshot text truncates at 25 characters when the report snapshot portlet is in a narrow dashboard column. To avoid this truncation, place the portlet in the wide column.

Setting Up Dashboard Portlet Content

As you add portlets to your dashboard, you can review the data and layout for each portlet. Initially, portlets show default data or no data because you need to perform portlet setup tasks after you have added portlets to a dashboard.

Most portlets have a menu that includes a Set Up link. When you click Set Up, a popup window opens where you can define data and layout. The menu is located on the right side of the title bar:



Some portlets, such as the KPI Meter, also have dropdown lists where you choose portlet content.

Note: If a portlet does not contain a dropdown list or a menu with a Set Up link, its data and layouts are not configurable.

The setup options for most portlets are self-explanatory. The following list includes brief tips about setting up different portlets. Links to more detailed explanations are provided as needed.

- **Calendar** – Select a calendar to display. By default, your calendar is shown. For details, see [Calendar Portlets](#).
- **Custom Portlet** – Click Set Up to select the source file for the SuiteScript results to display. For more information, see [Custom Portlets](#).
 - **Dashboard Tiles** – Click Set Up and select Dashboard Tiles from the **Source** field. For more information, see [Dashboard Tiles](#).
 - **Navigation Portlet** – Click Set Up to select Navigation Portlet from the **Source** field. For more information, see [Navigation Portlet](#).
- **Custom Search** – Click Set Up to select the saved search and the number of results to display. You can also give your portlet a custom title and choose whether to drill down into search results in the portlet or on a new page. If Inline Editing feature is enabled, you can choose whether to enable inline editing of search results. For more information, see [Custom Search Portlets](#).
- **KPI Meter** – From the dropdown list, select a KPI to display. Click Set Up to select date ranges, comparison, and highlighting options. For more information, see [KPI Meter Portlets](#).
- **KPI Scorecard** – Click Set Up to select a KPI scorecard and define layout options. For more information, see [KPI Scorecard Portlet](#).
- **Key Performance Indicators** – Click Set Up to select standard KPIs or custom KPIs based on custom saved searches. After you select the KPIs, you can select comparison and highlighting options. For more information, see [Key Performance Indicators Portlet](#).
- **List** – Click Set Up to select the type of record and the number of records to show. To edit records directly in the portlet, enable the Inline Editing feature. See the help topic [Using Inline Editing](#). For more information on List portlets, see [List Portlets](#).
- **My Login Audit** – Click Set up to set display options for monitoring your own login activity. For more information, see the help topic [My Login Audit Portlet](#).
- **Quick Add** – Click Set Up to select the type of record to be added. For more information, see [Quick Add Portlet](#).
- **Quick Search** – Click Set Up to define the type of records to search, then enter keywords in the portlet's text box and select a field name from the Search For dropdown list. For more information, see [Quick Search Portlet](#).
- **Project Tasks** – Add a List portlet to your dashboard, click Set Up in the portlet menu and choose Project Task as List Type. For more information, see [Project Tasks Portlets](#).
- **RSS/Atom Feed** – Click Set Up to select a feed and set display options. NetSuite provides a number of standard feeds, or you can choose custom and enter a URL for another feed. For more information, see [RSS/Atom Feed Portlets](#).

- **Reminders** – Click Set Up to select types of reminders and to define the number of days in advance that reminders should be shown. For more information, see [Setting Up Reminders](#).
- **Report Snapshot** – Select a date range for graphed data. If available, click Set Up to select a type of display and other layout options. For more information, see [Report Snapshot Portlets](#).
- **Search Form** – If any of your saved searches is used as the preferred search form for a particular record type, you can display this search form in a portlet on your dashboard. For more information, see [Search Form Portlet](#).
- **Shortcuts** – Click Set Up to reorder the listing of existing shortcut links. Click New Shortcut to add a shortcut if you know the URL of the page. If you do not know the URL, go to the page, and click More > Add to Shortcuts on that page. For more information, see [Shortcuts Portlet](#).
- **Tasks** – Select the Basic view to be able to display tasks assigned to other users in your system. For details, see [Tasks Portlet](#).
- **Trend Graph** – Click Set Up to select a KPI to graph and layout options. To change the graph's X axis scale, click on time period options in the portlet. For more information, see [Trend Graph Portlets](#).

Calendar Portlets

Calendar portlets list your activities ordered by date and time, with links to drill down into individual activity records. The calendar portlet is displayed by default on the Activities tab, and can be added to dashboards on other tabs.

You can add multiple calendar portlets to each dashboard. They act independently of each other and so provide the flexibility of displaying different calendar and time frame configurations on one page.

The screenshot displays the 'Activities' dashboard with two calendar portlets. The left portlet, 'Calendar: Uruguay - First Floor - Booth 1', is in a monthly view for March 2016, showing dates 1 through 31. The right portlet, 'Calendar: My Calendar', is in a weekly view for March 14-20, 2016, showing specific events with times and locations. Both portlets include a 'Quick Add: New Event' section with fields for Title, Start Time, Location, and End Time.

- ① – Calendar portlets are standalone items. They can be set up to display other calendars and date periods. For example, you may choose to display a Group calendar in the **Monthly** view to assist with meeting scheduling.
- ② – The center portlet is set up with a **Weekly** view of your personal calendar, providing a snapshot of the week ahead.

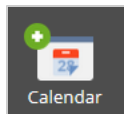
In each calendar portlet, you can select among a daily, weekly, monthly, or agenda view. You also can choose to display your own calendar or the public calendar for another entity within the organization. See [Toggling Calendar Portlet Settings](#).

To change the types of activities listed in a calendar portlet, click the **Set Up** menu option for the portlet. See [Choosing the Activities Shown in a Calendar Portlet](#).

You can print the details from a calendar portlet by clicking its **Print** menu option.

To add a Calendar portlet to a dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Calendar** icon or drag it onto the dashboard.



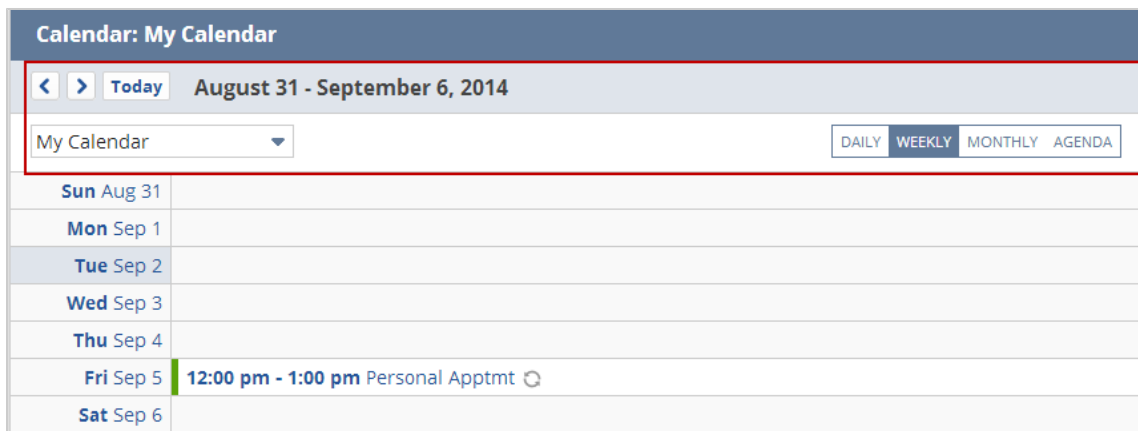
Toggling Calendar Portlet Settings

In each calendar portlet, you can quickly toggle the following settings:

- **Displayed Calendar:** By default, the calendar portlet displays **My Calendar**, a calendar of your own activities. To display activities for another entity within your organization that has a public calendar, click **My Calendar** and select that entity from the list. Entities with private calendars are not listed. To learn how to make a calendar public, see the help topic [Setting Calendar Preferences](#).
- **Calendar View:** **Daily**, **Weekly**, **Monthly**, or **Agenda**.

If you want to change the default values for these settings, click the **Calendar Preferences** link in the upper right corner of the Activities tab. For details about setting calendar preferences, see the help topic [Setting Calendar Preferences](#).

You can move the calendar forward and backward in time by clicking the > and < buttons.



Choosing the Activities Shown in a Calendar Portlet

You can click the **Set Up** menu option for a calendar portlet to bring up a popup where you can set the types of activity records that are shown in the portlet. The Calendar popup may include the following options:

- **Show Events** – Enabled by default.
- **Show Blocking Tasks** – Enabled by default.

- **Show Non-Blocking Tasks** – Enabled by default. Non-blocking tasks are those that do not reserve time. They appear first on your calendar on the day for which they are scheduled.
- **Show Blocking Phone Calls** – Enabled by default.
- **Show Non-Blocking Phone Calls** – Enabled by default. Non-blocking phone calls are those that do not reserve time. They appear first on your calendar on the day for which they are scheduled.
- **Show Canceled Events** – Disabled by default. If this option is enabled, canceled events display in the calendar in strikethrough text.
- **Show Campaign Events** – Disabled by default. Available if your role gives you access to Campaign records.
- **Show Resource Allocations** – Disabled by default. This option appears when you are designated a project resource and have active allocations. If this option is enabled, the project name for each allocation is displayed for each day you are allocated.
- **Show Weekends in Monthly View** – Enabled by default.
- **Records to Display in Agenda View** – Is set to **Today's Activities Only** by default. Can be set to **Today's and Upcoming Activities**.
- **Number of Records to Display in Agenda View** – Is set to 7 by default. This field must have a value set.

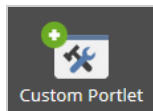
Custom Portlets

Custom portlets enable you to display SuiteScript results on your dashboard.

To be able to use this portlet, you first need to create a SuiteScript portlet script. To learn how to create portlet scripts, see the help topics [Portlet Scripts](#) and [SuiteScript 2.0 Portlet Script Type](#).

To add a custom portlet to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Custom Portlet** icon or drag it onto the dashboard.



3. To specify the script to be used by the portlet, click the **Set Up** link in the portlet or the portlet menu, select the script from the **Source** list, and click **Save**.

Dashboard Tiles

To get you started in using Dashboard Tiles, see the following topics:

- [Dashboard Tiles Overview](#)
- [Dashboard Tiles SuiteApp Availability](#)
- [Types of Dashboard Tiles](#)
- [Installing Dashboard Tiles](#)
- [Permissions for Dashboard Tiles](#)

- Creating Dashboard Tiles
 - Creating Reminder Tiles
 - Creating Static Tiles
- Customizing the Dashboard Tiles
 - Modifying Tile Appearance
 - Applying Conditional Alerts to the Dashboard Tiles
- Roles Update in Dashboard Tiles

Dashboard Tiles Overview

Dashboard Tiles display business critical KPIs in a bold visual layout with images and blinking alerts.

You can also configure the layout of these tiles based on how they will be displayed in the dashboard. The blinking images serve as visual alerts or reminders for metrics that meet the condition that you specified for the KPI.

Dashboard Tiles SuiteApp Availability

The Dashboard Tiles SuiteApp is a managed SuiteApp that is automatically updated whenever enhancements or new features are added.


For instructions on installing this SuiteApp, see [Installing Dashboard Tiles](#).

Types of Dashboard Tiles

You can create and customize the following dashboard tiles based on your preferences:

- **Reminder** - displays the numerical data that are derived from a saved search. The values that are displayed in a Reminder tile are based on the number of results of the specified Saved Search record. For example, you can create a reminder tile type for opportunities to close, sales orders to fulfill, etc.
- **Static** - displays a static value. An example of a static value is a percentage rate or target amount. A user can use a SuiteScript record to update the value for handling complex metrics that may require more than one saved search.

Installing Dashboard Tiles

 **Note:** Only administrators can install this SuiteApp.

To install the Dashboard Tiles SuiteApp:

1. Go to Customization > SuiteBundler > Search & Install Bundles.
2. On the Search and Install Bundles page, use the following information to search for the SuiteApp:
 - Bundle Name: **Dashboard Tiles**
 - Bundle ID: 185219
3. Click the Dashboard Tiles name link to display its Bundle Details page.
 - To review the documentation for the SuiteApp, click the Documentation link.

- The **Overview** subtab displays the abstract and description of the SuiteApp.
- The **Components** subtab lists bundle objects, including their custom script IDs, referencing objects, and lock status.

For more information, see the help topic [Bundle Details](#).

4. Click **Install**.

If asked, indicate your agreement to allow NetSuite to automatically upgrade the SuiteApp in your account when new updates become available.

During the installation, you can click **Refresh** to get the latest status.

Permissions for Dashboard Tiles

After installing the SuiteApp, the Dashboard Tiles custom record becomes available.

The following table lists the specific permission to use Dashboard Tiles:

Custom Record	Minimum Permission Level	Maximum Permission Level
Dashboard Tiles	View	Full

Creating Dashboard Tiles

You can create tiles depending on the data that you want to display on your dashboard. See the following topics for instructions on how to create dashboard tiles:

- [Creating Reminder Tiles](#)
- [Creating Static Tiles](#)



Note: A maximum of 50 tiles can be displayed in the portlet. If you created more than 50 tile records, the portlet will display the tiles depending on its display order value.

Creating Reminder Tiles

A reminder dashboard tile displays the numerical data that are derived from a saved search. The values that are displayed in a Reminder tile are based on the number of results of the specified Saved Search record.


For more information about the types of dashboard tiles, see [Types of Dashboard Tiles](#).

To create a reminder tile:


1. Go to Setup > Dashboard Tiles > Manage Dashboard Tiles > New.
2. Provide values for the following fields:
 - **Name** – Enter a name to describe the metrics displayed in the dashboard tile.
For example: Target Revenue This Quarter, Sales Order YTD, POs Pending Receipt, Sales and Marketing Expense.
 - **Inactive** – Check this box to inactivate the dashboard tile record.
 - **Tile Type** – Select **Reminder** from the list.
 - **Roles** – Select at least one role that you want to give access to this dashboard tile. To select more than one role, press the Ctrl key on your keyboard as you click the roles.

If you check the **Display to All Roles** box, this list will be disabled.

- **Display to All Roles** – Check this box if you want this tile to be available to all roles.

 **Note:** If no role is selected in the **Roles** field and you leave the **Display to All Roles** box blank, the tile will not appear in the portlet after you click **Save**. To display the tile in the portlet, you must select a role in the **Roles** field.


- **Display Order** – Enter a numeric value to define the order in which the tile will be displayed. . For example, if you enter 1, the tile will be displayed first in the portlet. The display order of the tiles are based on the available columns.

 **Note:** If two or more tiles have the same display order value, the system displays the tiles in alphabetic order.

A maximum of 50 tiles can be displayed in the portlet. If you created more than 50 tile records, the portlet displays the first 50 tiles depending on its display order value.

3. In the **Data** subtab, provide values for the following fields:

- **Saved Search** – Select the name of the saved search that will be used for the dashboard tile.

 **Important:** Saved searches are not validated by the system. If a saved search is not working properly, the tile will display incorrectly on the dashboard.

- **Display Value** – This field is automatically disabled when you select **Reminder** as tile type.
- **Prefix** – Enter characters that you want to append at the beginning of the tile value. For example, you can use a currency symbol as prefix.
- **Suffix** – Enter characters that you want to append at the end of the tile value.
- **Link** – Specify the URL of the saved search result to enable the system to open the page when the dashboard tile is clicked.

4. Click **Save** to create the Reminder dashboard tile.

Creating Static Tiles

Static dashboard tiles display a static value. A user can use a SuiteScript record to update the value for handling complex metrics that may require more than one saved search.

For more information about the types of dashboard tiles, see [Types of Dashboard Tiles](#).

To create a static tile:

1. Go to Setup > Dashboard Tiles > Manage Dashboard Tiles > New.
2. Provide values for the following fields:
 - **Name** – Enter a name to describe the static value displayed in the dashboard tile. Examples are Target Revenue This Quarter.
 - **Inactive** – Check this box to inactivate the dashboard tile record.
 - **Tile Type** – Select **Static** from the list.
 - **Roles** – Select at least one role that you want to give access to this dashboard tile. To select more than one role, press the Ctrl key on your keyboard as you click the roles. If you leave this field blank and click **Save**, the tile will not appear in the portlet. If you check the **Display to All Roles** box, this list will be disabled.
 - **Display to All Roles** – Check this box if you want this tile to be available to all roles.

Note: If no role is selected in the **Roles** field and you leave the **Display to All Roles** box blank, the tile will not appear in the portlet after you click **Save**. To display the tile in the portlet, you must select a role in the **Roles** field.

- **Display Order** – Enter a numeric value to define the order in which the tile will be displayed. . For example, if you enter 1, the tile will be displayed first in the portlet. The display order of the tiles are based on the available columns.

Note: If two or more tiles have the same display order value, the system will display the tiles in alphabetic order.
A maximum of 50 tiles can be displayed in the portlet. If you created more than 50 tile records, the portlet displays the first 50 tiles depending on its display order value.

3. In the **Data** subtab, provide values for the following fields:
 - **Saved Search**– This field is automatically disabled when you select Static as tile type.
 - **Display Value**– Enter the static value to be displayed in the dashboard tile.
 - **Prefix**– Enter characters that you want to append at the beginning of the tile value. For example, you can use a currency symbol as prefix.
 - **Suffix**– Enter characters that you want to append at the end of the tile value.
 - **Link**– Specify the URL of the saved search result to enable the system to open the page when the dashboard tile is clicked.
4. Click **Save** to create the static dashboard tile.

After creating a dashboard tile, you can customize the way it appears on your dashboard. For information on customizing the tiles, see [Customizing the Dashboard Tiles](#).

Customizing the Dashboard Tiles

After creating a dashboard tile, you can customize the appearance of the tiles. You must have a full access role or an administrator to change the appearance of the dashboard tiles depending on your preferences. You can do the following procedures to customize the dashboard tiles:

- [Modifying Tile Appearance](#)
- [Applying Conditional Alerts to the Dashboard Tiles](#)

Modifying Tile Appearance

The Dashboard Tiles SuiteApp enables administrators and users with edit permissions to change the font color, tile color, and icon of a tile.


To modify the tile appearance

1. Point your mouse cursor to the dashboard tile you want to edit and click the **Edit** icon. This icon is shown as a pen at the top-left corner of the dashboard tile.

Note: The **Edit** icon is only available to administrators and users with full access roles. If you are a user with an edit permission, you can edit the dashboard tiles by going to Setup > Dashboard Tiles > Manage Dashboard Tiles. Select a tile that you want to edit from the list.

2. In the **Appearance** subtab, provide values for the following fields:


- **Tile Color**– Select a color that you want for the dashboard tile. This field automatically applies the color code of the color that you selected.
- **Font Color**– Select a color that you want for the font of the dashboard tile. This field automatically applies the color code of the color that you selected.
- **Icon**– Select an icon that you want to use for the Dashboard tile or click the + icon to upload a new image.

 **Note:** For better performance of the tiles, you should upload files with small file sizes.

3. Click **Save** to apply the changes to the dashboard tile.


Applying Conditional Alerts to the Dashboard Tiles

When you apply a conditional alert to a dashboard tile, the icon will blink when the metrics meet the condition that you specified for the KPI.

 **Note:** This feature is available to administrators and users with full access or edit access roles.

To apply conditional alerts to a dashboard tile:

1. Point your mouse cursor to the dashboard tile you want to edit and click the **Edit** icon. This icon is shown as a pen at the top-left corner of the dashboard tile.

 **Note:** The **Edit** icon is only available to administrators and users with full access roles. If you are a user with an edit permission, you can edit the dashboard tiles by going to Setup > Dashboard Tiles > Manage Dashboard Tiles. Select a tile that you want to edit from the list.

2. Click the **Alerts** subtab.
3. Provide values for the following fields:
 - **Blink When**– Select the threshold condition that will trigger an alert in the form of blinking icon on the dashboard tile. You can select a condition from the following threshold:
 - ☐ **Greater Than Threshold**
 - ☐ **Less Than Threshold**
 - ☐ **Greater Than Or Equal Threshold**
 - ☐ **Less Than Or Equal Threshold**
 - **Threshold**– Enter a threshold value for the tile. The threshold and the Blink When preferences determine when the icon will start blinking on the dashboard.
4. Click **Save** to apply the changes to the dashboard tile.

Modifying the Content of the Dashboard Tiles

You can modify the display of the dashboard tiles portlet depending on your preferences. When a user logs in, the default portlet title and font sizes are used on the portlet. You can change this by using the Custom Content feature located at the right side of the title bar.

To modify the content of the Dashboard Tiles:

1. Click the menu icon in the Tiles portlet and select **Edit**.
2. In the Custom Content dialog, specify the values for the following fields:

- **Title** - Specify a name for the portlet. If this field is blank, the default name Tiles will be displayed in the portlet header.
- **KPI Font Size (PT)** – Select values from 0 to 18 pt. This field sets the font size of the tile KPI.
- **Label Font Size (PT)** – Select values from 0 to 16 pt. This field sets the font size of the tile label.
- **Blink Delay (MS)** – Select values from 300 to 3000. This field sets the blinking delay in millisecond. If no value is specified, the default 530 ms will be used in the tiles.

Roles Update in Dashboard Tiles

Dashboard Tiles enables you to add a target role to tiles that are assigned to a source role. A source role is used to identify the tiles where the target role will be added.

To add a target role to dashboard tiles:

1. Go to Setup > Dashboard Tiles > Roles Update.
2. In the **Target Role** field, select at least one role to be added to the dashboard tiles. To select more than one role, press the **Ctrl** key on your keyboard as you click the roles.
3. Select a source role in the **Source Role** field to identify the dashboard tiles that are assigned to this role.
4. Click **Run Update**. A message will be displayed to confirm the roles update. Click **OK** to proceed. You will be redirected to the Schedule Scripts page. Click **Refresh** to check the status of the update. The **Status** column will display a complete status after the update.

Navigation Portlet

To get you started in using this SuiteApp, see the following topics:

- [Navigation Portlet Overview](#)
- [Navigation Portlet SuiteApp Availability](#)
- [Installing the Navigation Portlet SuiteApp](#)
- [Setting up the Navigation Portlet SuiteApp](#)
 - [Custom Records and Permissions for the Navigation Portlet](#)
 - [Creating Navigation Categories](#)
 - [Creating Shortcut Groups](#)
- [Modifying the Content of the Navigation Portlet](#)
- [Roles Update for the Navigation Portlet](#)

Navigation Portlet Overview


Navigation Portlet enables you to simplify your navigation to commonly used menus in NetSuite. You can group the shortcuts or links that you commonly use for each navigation category. The links are displayed in the Custom Portlet and can be configured using custom record. You can add multiple navigation portlets in your dashboard.

Navigation Portlet SuiteApp Availability

The Navigation Portlet SuiteApp is a managed SuiteApp that is automatically updated whenever enhancements or new features are added.

For instructions on installing this SuiteApp, see [Installing the Navigation Portlet SuiteApp](#).

Installing the Navigation Portlet SuiteApp

 **Note:** Only administrators can install this SuiteApp.

To install the Navigation Portlet SuiteApp:

1. Go to Customization > SuiteBundler > Search and Install Bundles.
2. On the Search and Install Bundles page, use the following information to search for the SuiteApp:
 - Bundle Name: **Navigation Portlet**
 - Bundle ID: 186103
3. Click the Navigation Portlet name link to display its Bundle Details page.
 - To review the documentation for the SuiteApp, click the Documentation link.
 - The **Overview** subtab displays the abstract and description of the SuiteApp.
 - The **Components** subtab lists bundle objects, including their custom script IDs, referencing objects, and lock status.

For more information, see the help topic [Bundle Details](#).

4. Click **Install**.

If asked, indicate your agreement to allow Netsuite to automatically upgrade the SuiteApp in your account when new updates become available.

During the installation, you can click **Refresh** to get the latest status.

Setting up the Navigation Portlet SuiteApp

You can set up the navigation portlet depending on the shortcuts and links that you commonly use in your NetSuite account. In setting up your Navigation Portlet SuiteApp, you can do the following procedures:

- [Creating Navigation Categories](#)
- [Creating Shortcut Groups](#)

Custom Records and Permissions for the Navigation Portlet

After installing the Navigation Portlet SuiteApp, roles must be given access to the following custom records:

- Navigation Categories
- Navigation Shortcut
- Navigation Shortcut Group
- Navigation Shortcut Tooltip


The following table lists the permission required to access the custom records:

Custom Record	Minimum Permission Level	Maximum Permission Level
Navigation Categories	View	Full

Custom Record	Minimum Permission Level	Maximum Permission Level
Navigation Shortcut	View	Full
Navigation Shortcut Group	View	Full
Navigation Shortcut tooltip	View	Full

Creating Navigation Categories


A navigation category contains a set of shortcut groups that are relevant to a role in your NetSuite account. When a user logs in, the Navigation Portlet displays the navigation links that are organized in a shortcut group. The shortcut groups and links displayed in the portlet depend on the navigation category selected in the list.

 **Note:** Your administrator provides roles access to certain navigation categories.

For more information about shortcut groups, see [Creating Shortcut Groups](#).

To create navigation categories:

1. Go to Setup > Navigation Portlet > Manage Shortcut Group > New.
2. In the **Assign to Category** field, select **New** from the list or click the + icon. The Navigation Category window is displayed.
3. Enter a name for the navigation category and click Save.


 **Note:** If you want to hide the navigation category that you created, check the **Inactive** box. Hidden navigation categories will not display in the navigation categories list. You can create a total of 25 categories with a complete set of shortcut groups and links. For the number of shortcut groups and links that can be displayed in the portlet, see [Creating Shortcut Groups](#).

Creating Shortcut Groups

A shortcut group is a group of related links for a category. When you create a shortcut group record, you need to assign it to a navigation category.

To create a shortcut group:

1. Go to Setup > Navigation Portlet > Manage Shortcut Group > New.
2. Provide values for the following fields:
 - **Name**– Enter a name for the shortcut group. The value you entered in this field appears in the navigation portlet.

 **Note:** If you created shortcut groups with the same name, the shortcut group that was first created will be used. If shortcut groups are created with the same name but assigned to different navigation categories, both shortcut groups will be displayed in the portlet.

- **Assign to Category** - Select a navigation category to which you want to assign the shortcut group. To create a new navigation category, select **New** from the list. For information on creating navigation categories, see [Creating Navigation Categories](#).

- **Shortcut Group Display Order** – Enter a numeric value to define the display order of the shortcut group. For example, if you enter 1, the shortcut group will show as the first column in the navigation portlet. The display order of the shortcut groups are based on the available columns.

If two or more shortcut groups have the same display order value in the shortcut group, the system will display those shortcut groups in alphabetic order.



Note: Navigation Portlet can only display up to 8 shortcut groups. If you entered a display order value that is beyond the limit, the shortcut group will still be created but will not appear in the Navigation Portlet.

- **Icon** – Select an image to be displayed with this shortcut group. Image files must be uploaded to the File Cabinet. It is recommended to use a square image. The system automatically adjusts the size to 60x60 pixels when the image is shown in the navigation portlet.
- **Display Shortcut Groups to All Roles** – Check this box if you want this shortcut group to be available in all roles.
- **Role** – Select at least one role that you want to give access to this shortcut group. If you checked the box for **Display Shortcut Groups to All Roles** field, all roles are automatically selected in this list.

3. Add a shortcut to the shortcut group:

- In the **Navigation Shortcut Name** column, enter the shortcut name that you want to appear in the navigation portlet.
- Enter a numeric value in the **Shortcut Display Order** column. The value you entered in this field will determine the display order of the shortcut in the shortcut group.
- In the **Link** column, enter the URL of the shortcut.



Important: The system does not validate the URL. Ensure that you have entered the correct URL for the link to open the correct page when the user clicks on the link.

- Optionally, enter a tooltip for the link or select from the available tooltips in the **Tooltip** list. The value you entered will display when you point to the link in the shortcut group. The tooltip list is a custom record that supports multiple languages.
- Click **Add**.
- Repeat steps a to e to add shortcuts to the shortcut group. You can only add up to 5 shortcut links per shortcut group.
- Click **Save** to create the shortcut group.

Modifying the Content of the Navigation Portlet

You can modify the display of the navigation portlet depending on your preferences. When a user logs in, the default name and column display appears on the portlet. You can change this by using the Custom Content feature located at the right side of the title bar.

To modify the content of the Navigation Portlet:

- Click the menu icon in the Navigation Shortcut Group and select **Edit**.
- In the Custom Content dialog, specify values for the following fields:
 - **Title**– Enter a name for the shortcut portlet. If this field is blank, the default name Navigation Shortcut Group will display as the portlet name.

- **No. of Category Columns to Display**– Enter a numeric value for the number of columns to display. The maximum number that you can enter in this field is 4.

Note: When you move the portlet to the side of the dashboard, it will automatically display one column only.

- **Default Category**– Optionally, select the shortcut group to display as the default. If this field is blank, the portlet will display the shortcut groups according to the display order defined in the navigation category.

3. Click **Save** to reflect the changes.

Roles Update for the Navigation Portlet

The Navigation Portlet enables you to add a target role to shortcut groups that are assigned to a source role. A source role is used to identify the shortcut groups where the target role will be added.

To add a new role to a shortcut group:

1. Go to Setup > Navigation Portlet > Roles Update.
2. In the **Target Role** field, select at least one role to be added to the shortcut group. To select more than one role, press the **Ctrl** key on your keyboard as you click the roles.
3. Select a source role in the **Source Role** field to identify the shortcut groups that are assigned to this role.

Note: Inactive source roles will not be updated.

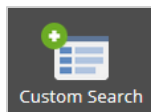
4. Click **Run Update**. A message will be displayed to confirm the roles update. Click **OK** to proceed. You will be redirected to the Schedule Scripts page. Click **Refresh** to check the status of the update. The **Status** column will display a complete status after the update.

Custom Search Portlets

You can configure custom search portlets to display saved search results on the home page dashboard. Up to six custom search portlets can be used on the home page dashboard.

To add a Custom Search portlet to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Custom Search** icon or drag it onto the dashboard.



3. To specify which saved search to display, click the **Set Up** link in the portlet or the portlet menu, select the search from the **Search** list, and click **Save**.

You can also add a custom title for your portlet and specify other display options. For more details, see the help topic [Displaying Saved Search Results in Dashboard Portlets](#).

When placed in the right or left columns of a dashboard, custom search portlets display only the first 4 results columns of the saved search. When placed in the center column, they display the first 9 columns. Custom search portlets also include New, Edit, and View columns with links for each result record.

KPI Meter Portlets

A KPI meter portlet displays data for one of the KPIs included in the Key Performance Indicators portlet.

To be able to add a KPI meter for a key performance indicator, you need to add and configure a Key Performance Indicators portlet first. For more information, see [Setting Up the Key Performance Indicators Portlet](#).

To add a KPI Meter portlet to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **KPI Meter** icon or drag it onto the dashboard.



3. In the portlet's dropdown menu, select the key performance indicator to display it as a meter.
4. For additional display options, click the **Set Up** link in the portlet menu. You can modify the time period, comparison, and highlighting options for this KPI meter.

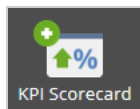
To learn more about KPI meter portlets, see [KPI Meters](#).

KPI Scorecard Portlet

KPI Scorecard portlets can display data comparisons across multiple key performance indicators (KPIs). These comparisons are stored in NetSuite as separate KPI Scorecard records. You need to create a KPI scorecard before you can add it to your dashboard. To learn how to set up a KPI scorecard, see [Creating a KPI Scorecard](#).

To add a KPI Scorecard portlet to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **KPI Scorecard** icon or drag it onto the dashboard.



3. Click the **Set Up** link in the portlet or the portlet menu to configure the portlet.
4. Select the KPI scorecard to display and click **Save**. You can also set filtering and orientation options, as well as choose to show or hide the date row or the trend graph icon.

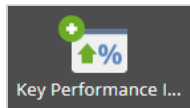
For more information on adding KPI Scorecard portlets, see [Adding a KPI Scorecard Portlet to a Dashboard](#).

Key Performance Indicators Portlet

Key Performance Indicators (KPIs) provide summaries of your forecast, pipeline, orders, cases, and financial data right on your dashboard. Each KPI compares data based on reports over different time ranges. You can use standard KPIs or create custom KPIs based on saved searches.

To add a Key Performance Indicators portlet to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Key Performance Indicators** icon or drag it onto the dashboard.



3. To configure the KPIs to be displayed, click the **Set Up** link in the portlet menu.

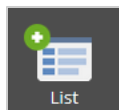
For more information about KPIs, see [Key Performance Indicators Overview](#). To learn how to set up custom KPIs, see [Custom KPIs](#).

List Portlets

List portlets can display records of a specific record type. You can choose among standard record types (employees, activities, transactions, and many other) and custom record types created by you or other users. You can also use this portlet to add new records of the selected record type. In addition to viewing records, you can use this portlet to display the results of saved searches related to the record type you selected.

To add a List portlet to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **List** icon or drag it onto the dashboard.



3. To specify the type of records you want to be displayed, click the **Set Up** link in the portlet or the portlet menu, select the record type from the **List Type** menu, and click **Save**.

To display the results of a saved search related to the record type you selected, use the portlet's **View** menu.

To create a new record of the selected record type, you can use a link in the portlet menu.

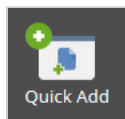
Quick Add Portlet

You can use the Quick Add portlet to quickly add new records of a selected type from the dashboard without shifting to another page. For example, a Sales Rep could create a new customer record from the Home page, or a new task record from a customer page.

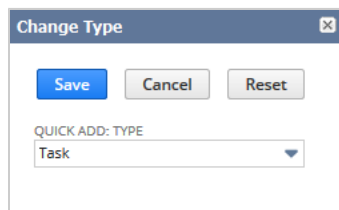
You can set up the Quick Add portlet to be used for a number of standard record types or for a custom record type that you have defined as available for Quick Add. You also can edit the fields available in the portlet for data entry.

To add a Quick Add portlet to a dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Quick Add** icon or drag it onto the dashboard.



3. To change the default record type, click the **Set Up** link in the portlet menu, select the record type from the **Quick Add: Type** list, and click **Save**.



For more information, see [Using Quick Add for Standard Records](#) and [Using Quick Add for Custom Records](#).

Using Quick Add for Standard Records

Quick Add is available for the following standard record types:

- Case
- Contact
- Customer
- Event
- Lead
- Opportunity
- Partner
- Phone Call
- Prospect
- Task
- Vendor

The fields in the Quick Add portlet for each standard record type are based on the Quick Add fields defined for the user's preferred form for the record type, as defined on the Role setup page for the role used to log in. Quick Add fields on standard forms are system-defined.

Note: Fields included in the Quick Add portlet are also available for Inline Editing when this feature is enabled. For details, see the help topic [Using Inline Editing](#).

The following table lists the default Quick Add fields for each supported record type. Fields listed in the middle column cannot be removed from the Quick Add portlet. Note that field names may be slightly different in your user interface.

Record Type	Fields Required in Quick Add Portlet	Other Default Quick Add Fields
Case	Subject, Company, Incident Date	Message, Contact
Contact	Contact, Subsidiary (OneWorld only)	Company, Job Title, Email, Phone
Customer	Company Name, Subsidiary (OneWorld only)	Customer ID, Web Address, Email, Phone
Event	Title, Date, Start Time, End Time	Location, Message
Lead	Subsidiary (OneWorld only)	Customer ID, Company Name, Web Address, Email, Phone
Opportunity	Company, Status, Expected Close, Projected Total	Estimated Budget, Sales Readiness, Buying Time Frame, Buying Reason, Title, Details
Partner	Partner ID, Partner Code, Subsidiary (OneWorld only)	Company Name, Phone, Email
Phone Call	Subject, Organizer, Date	Phone Number, Transaction
Prospect	Company Name, Subsidiary (OneWorld only)	Phone, Email, Web Address
Task	Title, Priority, Start Date, Due Date	Insert Before
Vendor	Vendor ID, Company Name, Subsidiary (OneWorld only)	Email, Phone, Default Expense Account

Using Quick Add for Custom Records

You can set up custom records so that they are available to be added from the Quick Add portlet. You need to enable the Allow Quick Add option for any custom record type for it to be listed in the Quick Add Type dropdown list.

To enable Quick Add for a custom record:

1. Open the custom record type that you would like to use in the Quick Add portlet. Custom record types are available at Customization > Lists, Records, & Fields > Record Types.
2. Select the **Allow Quick Add** box.

The screenshot shows the 'Custom Record Type' configuration page for 'Equipment Service'. The page includes a 'More' link in the top right corner. Below the title, there are buttons for 'Save', 'Cancel', 'Reset', 'Change ID', and an 'Actions' dropdown. The 'NAME' field is set to 'Equipment Service'. The 'ID' is 'customrecord30' and the 'INTERNAL ID' is '30'. The 'SHOW OWNER' section has checkboxes for 'ON RECORD', 'ON LIST', and 'ALLOW CHANGE'. The 'ACCESS TYPE' dropdown is set to 'Require Custom Rec...Entries Permission'. The 'ALLOW UI ACCESS' checkbox is checked. The 'ALLOW MOBILE ACCESS' checkbox is unchecked. The 'ALLOW ATTACHMENTS' checkbox is checked. The 'ALLOW QUICK SEARCH' checkbox is unchecked. The 'ALLOW QUICK ADD' checkbox is checked and highlighted with a red box. The 'ENABLE SYSTEM NOTES' checkbox is checked. The 'INCLUDE IN GLOBAL SEARCH' checkbox is checked. The 'INCLUDE IN SEARCH MENU' checkbox is checked. The 'ENABLE OPTIMISTIC LOCKING' checkbox is unchecked.

By default, only the **Name** field is provided for custom record Quick Add portlet data entry. To permit data entry for other custom record custom fields, you can enable the per field Allow Quick Add option.

3. To enable Quick Add for a field, click that field on the **Fields** subtab. On the **Display** subtab of the field settings page, select the **Allow Quick Add** option. Click **Save** to apply your settings.

The screenshot shows the 'Equipment Service Field' configuration page. At the top, there are tabs for 'Fields', 'Display', 'Validation & Defaulting', 'Sourcing & Filtering', 'Access', and 'History'. The 'Display' tab is selected. In the 'Display' section, the 'ALLOW QUICK ADD' checkbox is checked and highlighted with a red rectangle. Other visible settings include 'LABEL' (Equipment), 'ID' (custrecord33), 'INTERNAL ID' (101), 'OWNER' (Wolfe, J Wolfe, J), 'TYPE' (List/Record), 'LIST/RECORD' (Equipment), 'STORE VALUE' (checked), and 'USE ENCRYPTED FORMAT' (unchecked). There are also checkboxes for 'SHOW IN LIST', 'GLOBAL SEARCH', 'RECORD IS PARENT' (checked), 'INACTIVE', and 'APPLY ROLE RESTRICTIONS'.

4. Click **Save** to save the custom record type settings.

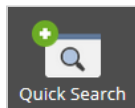
After you have enabled the Allow Quick Add option for the custom record type, you may need to refresh the page to display the enabled fields in the Quick Add portlet.

Quick Search Portlet

You can add a Quick Search portlet to be able to search for general records or transaction records right from your dashboard.

To add a Quick Search portlet:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Quick Search** icon or drag it onto the dashboard.



3. By default, the portlet is configured to search over general records, such as customers, vendors, items, activities, and other records.

To make this portlet search over transaction records, such as cash sales, purchase orders, customer refunds, and other transactions, click the **Set Up** link in the portlet menu and select **Transaction** from the **Search Type** menu.

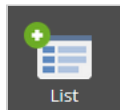
To learn more about the Quick Search portlet, see the help topic [Quick Search Portlet](#).

Project Tasks Portlets

If you use Project Management, you can add the Project Tasks portlet to display project tasks on your dashboard. The portlet shows project tasks assigned to all resources and provides quick access to project task information.

To add a Project Tasks portlet:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **List** icon or drag it onto the dashboard.



3. Click the **Set Up** link in the portlet or the portlet menu and select **Project Task** from the **List Type** list.
4. Click **Save** to update the portlet content.

If you use the Inline Editing feature, you can change a project task's status in the Project Tasks portlet. Changes made to a task in the portlet are automatically changed on the task record. For more information on inline editing, see the help topic [Using Inline Editing](#).

You can also click Edit next to a task in the Project Tasks portlet to update the information on a project task record. Use the portlet filter options to select the range of tasks to display in the portlet. Filter selections are sticky changes, meaning your selections are saved until you change them.

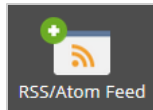
RSS/Atom Feed Portlets

You can publish information from news sources on your dashboard. By default, NetSuite offers you feeds by CNN, Reuters, Yahoo, CBS Market Watch, and more. In addition to the predefined feeds, you also can choose to display custom RSS feeds from other sites, or to create a custom feed to publish messages to users of your NetSuite account. Generally, you can include a maximum of two RSS/Atom feeds per page.

Note: Currently, you can add only two RSS feeds each on the home tab and Issues tab (if available). There is no limitation on the number of RSS feeds on custom tabs. For information, see the help topic [Creating Center Tabs](#).

To add an RSS/Atom feed portlet to a page:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **RSS/Atom Feed** icon or drag it onto the dashboard.



To set up an RSS/AtomFeed portlet:


1. Click **Set Up** in the portlet menu to open the setup popup window.

2. Select an RSS feed from the **Source** list.

If you select one of the sources that NetSuite provides, the **Feed URL** field automatically contains the correct URL.

If you select **Custom**, enter the URL of the feed in the **Feed URL** field. This URL can be from a website or from your own set of HTML pages used as an RSS feed.

To find the URL for a website's feed:

1. Go to the website, and look for an RSS/XML link or  icon.
2. Click the link or icon to open the feed page.
3. Copy and paste this page's URL into the setup window's **Feed URL** field.

To learn how to create your own custom RSS feed, see [Creating Custom RSS/Atom Feeds](#).

3. In **Number of Links**, type the number of links you want to appear in the portlet.
4. If you want to display links only, without additional details, clear the **Show Details** box. The details that are displayed depend on the RSS feed.
5. Click **Save**.

You now can see the feed information in the dashboard portlet.

If the portlet takes up too much space on your dashboard, click **Set Up** again and reduce the number of links or clear the **Show Details** box.

Creating Custom RSS/Atom Feeds

You can create your own custom RSS/Atom feeds to publish information to users in dashboard portlets. In this case, RSS/Atom Feed portlet displays links to HTML pages stored in the file cabinet with brief descriptions of every page linked.

To create a custom feed, you must first create HTML documents containing the information to which the RSS/Atom Feed portlet will link. Then you should upload these files to the file cabinet. Finally, you need to create an RSS Feed record in NetSuite that will include the links to your HTML files. This

record also includes a definition of the audience for the file. The audience may include different roles, employees, customers, and other entities.


To create a custom RSS/Atom feed:

1. Create a set of HTML documents outside of NetSuite that you will link to from an RSS/Atom Feed portlet.
2. Go to Documents > Files > File Cabinet. Upload your HTML files.
3. For each file, click **Edit** and copy the file's URL.
4. Go to Lists > Web Site > RSS Feeds. Click **New**. The RSS Feed record stores the links and information to display in your custom RSS/Atom Feed portlet.
5. In the **Title** field, enter a title for your feed. This title is displayed as the portlet title.
6. In the **Alias** field, enter a name to describe this feed in the custom RSS Feeds list.
7. In the **Description** field, enter a message describing this feed.
8. Check or clear the **Available Externally** box to define the audience for your feed:
 - If you clear this box, the RSS feed is available only to users with login access to your account, and you must choose who can access this feed by selecting users on the **Audience** subtab.
 - If you check this box, all users will have access to this feed.
9. On the **Items** subtab, add the titles, descriptions, and URLs for each of your HTML files.
 - The **Title** appears as the link text in the RSS/Atom Feed portlet.
 - The **Description** field contains details about the content of the linked HTML page.
 - The **URL** field should contain the URL for the linked HTML file.
10. When you have added titles, descriptions, and URLs for all your HTML files, click **Save**.

Users in the defined audience now can choose to display the custom feed in an RSS/Atom Feed portlet on their dashboards. For information, see [RSS/Atom Feed Portlets](#). If you are an administrator, you can publish your dashboard with this feed to users with other related roles. For information, see [Publishing Dashboards Overview](#).

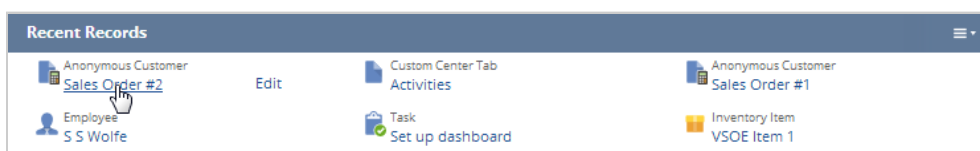
Note: Currently, you can add only two RSS feeds each on the **Home** tab and **Issues** tab (if available). You can get around this limitation by creating a custom tab, where there is no limitation on the number of RSS feeds. For information, see the help topic [Creating Center Tabs](#).


Reviewing Recent Records

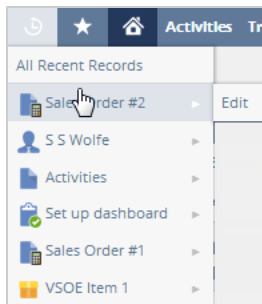
The Recent Records portlet displays a list of records that you have recently created, modified, or viewed with links that you can click for quick access to these records. Recent records are also listed on the recent records menu, , on the left of the navigation menu.

The Recent Records portlet does not have a Set Up link, so you cannot change its contents.

In this portlet, as in others, the controls are hidden until you move your cursor over the portlet. Each record includes a link to view the record. In addition, if you have edit permission for the record, an Edit link appears to the right as shown in this screenshot.

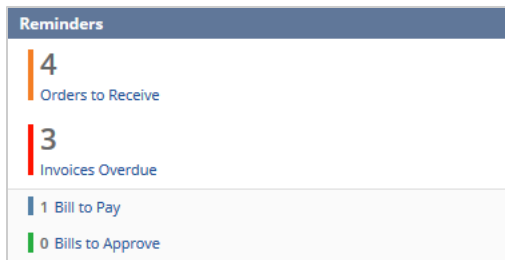


The following screenshot displays the Recent Records menu available from the  icon on the navigation menu. Click a link to display an individual record, or click All Recent Records to display a list of all records you have used recently, in reverse chronological order.



Setting Up Reminders

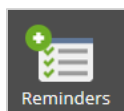
You can set up reminders for important data or tasks in NetSuite. Reminders appear in the Reminders portlet on dashboards. When you click a reminder in the portlet, you go to a page with more details where you can take action as necessary.



For example, Wolfe Electronics has set up a reminder to receive orders. When there are orders to be received, a reminder appears in the Reminders portlet. A user clicks the reminder and goes to the Receive Orders page.


To add a Reminders portlet:

1. If you do not see any Reminders portlet on your dashboard, click the **Personalize** link in the upper right corner of your dashboard. You can also use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Reminders** icon or drag it onto the dashboard.

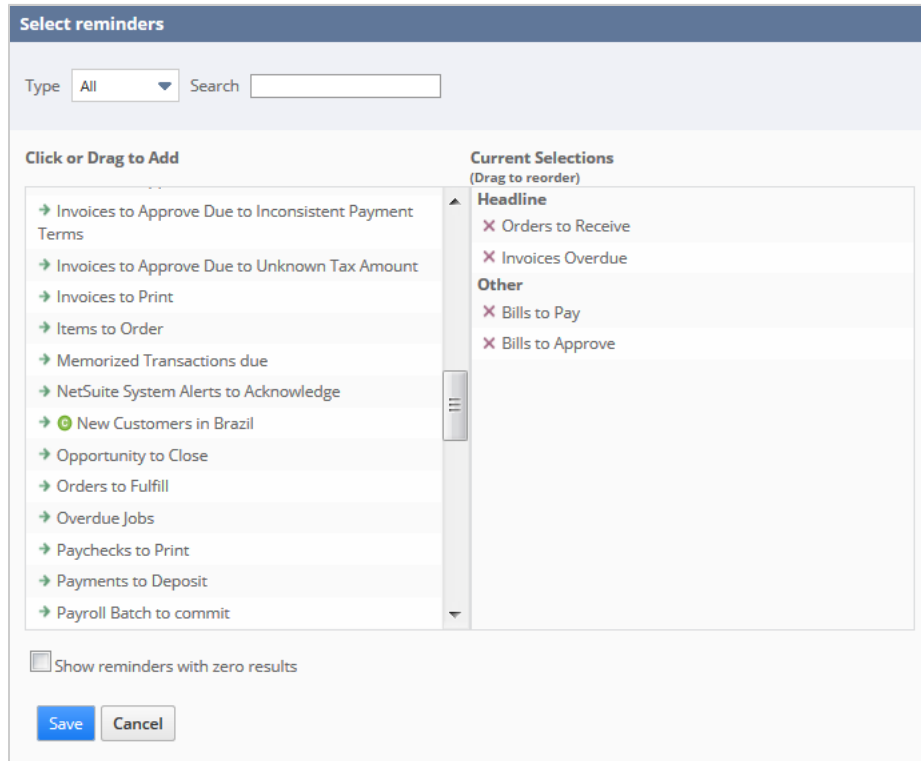


To set up the Reminders portlet:

1. In the Reminders portlet's menu, click **Set Up**.
2. Click a reminder in the left list or drag it to the **Current Selections** list on the right.

The reminders are arranged alphabetically. Custom reminders are marked with .


The available system-defined reminders depend on your role and the features enabled in your account. For a list of the reminders NetSuite offers, see [System-Defined Reminders Table](#). Custom reminders are available when saved searches to which you have access are marked as available for reminders. For information, see [Creating Custom Reminders](#).



Select reminders

Type: All Search:

Click or Drag to Add

- Invoices to Approve Due to Inconsistent Payment Terms
- Invoices to Approve Due to Unknown Tax Amount
- Invoices to Print
- Items to Order
- Memorized Transactions due
- NetSuite System Alerts to Acknowledge
-  New Customers in Brazil
- Opportunity to Close
- Orders to Fulfill
- Overdue Jobs
- Paychecks to Print
- Payments to Deposit
- Payroll Batch to commit

Current Selections
(Drag to reorder)

Headline

- ✗ Orders to Receive
- ✗ Invoices Overdue

Other


- ✗ Bills to Pay
- ✗ Bills to Approve

☐ Show reminders with zero results

Save **Cancel**


3. You can change the order in which reminders appear in the Reminders portlet by dragging them up or down in the list.
4. If you want a reminder to be used as a headline reminder, drag it under the **Headline**.
Headline reminders are displayed in the upper part of the portlet and use a more prominent layout.
5. If you want the reminders to be shown even when there are no results to display, select **Show reminders with zero results**.
6. When ready, click **Save**.

A count and a link is displayed for each reminder that has matching results. Click the reminder link to display the related task or search results.

 **Note:** To see continually updated results for reminders, refresh the portlet periodically.

You can apply highlighting rules to any of your reminders. Each highlighting rule adds a color indicator to the reminder whenever the specified threshold is reached.

To set up highlighting rules:

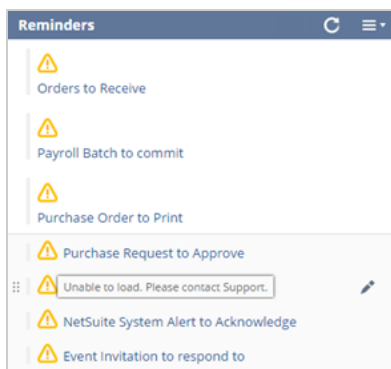
1. In the Reminders portlet, point to a reminder you want to edit and click the edit icon .
2. To add a highlighting rule, click **Add Rule**, choose the color to use, and specify the threshold.
You can specify as many rules as you need.

3. Click **Save** to apply the highlighting rules.

Reminder alerts

The Reminders portlet indicates if a specific Saved Search (both Standard or Custom Reminders) is interrupted for any reason by a yellow triangle icon.


All other saved searches that finish successfully show a reminder count as expected. If you hover the mouse over the icon, it shows a hint according to your role, permissions, and saved search ownership.



- For Administrators, the message for errors for standard reminders appears as **Unable to load. Please contact Support.**
- For non-Administrators, a message of **Unable to load. Please contact your Administrator** will appear.
- For Administrators who are also owners, the message of **Unable to load. Please modify your search** will appear.
- For Administrators who are not owners, the message of **Unable to load. Please contact the owner or create a new reminder** will appear.
- For non-Administrators who are owners, the message of **Unable to load. Please modify your search** will appear.
- For non-Administrators who are owners and can perform search, the message **View: Unable to load. Please change to a role with sufficient permissions and modify your search** will appear.
- For non-Administrators who are not owners but can perform Search, the message **Full: Unable to load. Please contact the owner or create a new reminder** will appear.
- For non-Administrators who are not owners and cannot perform search, the message **View: Unable to load. Please contact your Administrator** will appear.

System-Defined Reminders Table

The following table describes reminders that may be available, depending on your role and the features enabled in your account.

 **Note:** Custom reminders may also be available to you. See [Creating Custom Reminders](#).

For more information on setting reminders, see [Setting Up Reminders](#).

Reminder	Description
Allocation Schedules due	Reminds you of allocation schedules that are due.
Amortization Entries pending	Reminds you of amortization entries that are pending. Clicking this reminder takes you to the Amortization Journal Entries page filtered to show only transactions for the current period.
Assemblies to Build	Reminds you of assembly work orders you need to enter.
Assemblies to Order	Reminds you of assembly work orders to order.
Bills to Pay	Reminds you of bills you need to pay. You can customize this reminder by choosing how many days before the due date you would like this reminder to appear. Clicking this reminder takes you to the page.
Calls that are overdue	Reminds you of phone calls that are overdue. Clicking this reminder takes you to a list of phone calls filtered to show only calls that are overdue.
Calls to complete	Reminds you of phone calls that are not complete. Clicking this reminder takes you to a list of phone calls filtered to show only calls you need to complete.
Campaigns to Email	Reminds you of campaigns you need to email. Clicking this reminder takes you to the Campaign Calendar page.
Campaigns to Print	Reminds you of marketing campaigns you need to print.
Cases to respond to	Reminds you of cases you need to resolve. Clicking this reminder takes you to the Cases page. The number corresponds to the number of open or escalated cases assigned to you and awaiting support reply.
Checks to Print	Reminds you of checks you need to print. Clicking this reminder takes you to the Print Checks and Forms page.
Commissions Rejected by Accounting	Shows the number of commissions that have been rejected by the your company's accounting department. Clicking this reminder takes you to the Commissions list filtered to show only commissions that have been rejected by accounting.
Credit Cards to Approve	Reminds you of credit card payments you need to approve. Clicking this reminder takes you to the Unapproved Payments Register.
Credit Memos to Print	Reminds you of credit memos you need to print. Clicking this reminder takes you to the Print Credit Memos page.
Customers to Bill	Reminds you of customers that need to be billed. Clicking this reminder takes you to the page you use for billing, which varies according to how you process customer billing.
Customers to Renew	Reminds you of the number of customers you need to renew. Clicking this reminder takes you to the Customers & Projects page.

Reminder	Description
Direct Deposits Returned	Reminds you of the number of returned Direct Deposits. Clicking this reminder takes you to the View Direct Deposit Status page filtered to list all payments returned with an Unreachable or Unknown Error status.
Direct Deposits to Approve	Reminds you of direct deposits you need to approve. Clicking this reminder takes you to the Approve Direct Deposit Payments page filtered to list all payments pending approval.
Direct Deposits to Print	Reminds you of direct deposit vouchers you need to print. Clicking this reminder takes you to the Print Checks and Forms page.
Electronic Funds Transfers Returned	Reminds you of the number of returned electronic funds transfers. Clicking this reminder takes you to the View Electronics Funds Transfer Status page filtered to list all payments returned with a Failed, Unreachable or Unknown Error status.
Electronic Funds Transfers to Approve	Reminds you of electronic funds transfer you need to approve. Clicking this reminder takes you to the Approve Electronic Funds Transfers page filtered to list all transfers pending approval.
Employees to Pay	Reminds you of the number of employees awaiting a payroll run. You can customize this reminder by choosing how many days before the next pay period you would like this reminder to appear. Clicking this reminder takes you to the Payroll Run page.
Employees to Review	Reminds you of the number of employees you need to review. Clicking this reminder takes you to your Employees list.
Employees with an Expiring Authorization	Reminds you of employees who have authorizations expiring.
Employees with an Expiring Visa	Reminds you of employees who have visas expiring.
Employees with an Upcoming Anniversary	Reminds you of employees who have upcoming anniversaries.
Employees with an Upcoming Birthday	Reminds you of employees who have upcoming birthdays.
Estimates to Print	Reminds you of estimates you need to print. Clicking this reminder takes you to the Print Estimates page.
Event Invitations to respond to	Reminds you of invitations you need to respond to. Clicking this reminder takes you to the Events List page.
Expense Reports to Approve	Reminds you of expense reports you need to approve. Clicking this reminder takes you to the Approve Expense Reports page.
Invoices Overdue	Reminds you of overdue invoices. You can customize this reminder by choosing how many days after the due date you would like this reminder to appear. Clicking this reminder takes you to the Open Invoices report filtered to show only invoices that are overdue.
Invoices Rejected	Reminds you of invoices that were rejected.
Invoices to Approve Due to Credit Hold	Reminds you of invoices that you must approve due to credit hold.
Invoices to Approve Due to Inconsistent Payment Terms	Reminds you of invoices that you must approve due to inconsistent payment terms.
Invoices to Approve Due to Unknown Tax Amount	Reminds you of invoices that you must approve due to unknown tax amount.
Invoices to Approve	Reminds you of invoices that you must approve.

Reminder	Description
Invoices to Print	Reminds you of invoices you need to print. Clicking this reminder takes you to the Print Invoices page.
Items to Order	Reminds you of items you need to order. Clicking this reminder takes you to the Inventory Stock Status By Item list filtered to show only items you need to order or build.
Journals to Approve	Reminds you of journal entries to approve.
Memorized Transactions due	Reminds you of memorized transactions that are due. You can customize this reminder by choosing how many days before the due date you would like this reminder to appear. Clicking this reminder takes you to the Memorized Transactions page.
NetSuite System Alerts to Acknowledge	Reminds you of problems encountered in processing transactions and provides suggestions on how to resolve the problem.
Opportunities to Close	Reminds you of the number of open opportunities. You can customize this reminder by entering the number of days before the expected close date you would like this reminder to appear. Clicking this reminder takes you to a list of your open opportunities.
Orders to Fulfill	Reminds you of sales orders you need to fulfill. Clicking this reminder takes you to the Fulfill Sales Order page.
Orders to Pack	Reminds you of sales orders you need to pack. Clicking this reminder takes you to the Pack Orders page.
Orders to Receive	Reminds you of the number of purchase orders you need to receive. Clicking this reminder takes you to the Receive Purchase Orders page.
Orders to Ship	Reminds you of sales orders you need to ship. Clicking this reminder takes you to the Mark Orders Shipped page.
Overdue Projects	Reminds you of projects that are overdue. You can customize this reminder by choosing how many days before the estimated end date you would like this reminder to appear. Clicking this reminder takes you to the Customer & Projects page filtered to show only the overdue projects.
Paychecks to Print	Reminds you of paychecks you need to print. Clicking this reminder takes you to the Print Checks and Forms page.
Payments to Deposit	Reminds you of payments you need to deposit. Clicking this reminder takes you to the Deposit page filtered to show deposits you need to make.
Payroll Batches to Commit	Reminds you of payroll batches you need to commit. Clicking this reminder takes you to the Payroll batch list where you can view or edit each uncommitted payroll before committing.
Periods to Close	Reminds you of accounting periods you need to close. You can customize this reminder to remind you to close a period in a specific number of days after the period ends. Clicking this reminder takes you to the Manage Accounting Periods page.
Purchase Orders to Bill	Reminds you of the number of purchase orders you need to bill. Clicking this reminder takes you to the Bill Purchase Orders page.
Purchase Orders to Print	Reminds you of purchase orders you need to print. Clicking this reminder takes you to the Print Purchase Orders page.
Purchase Requests to Approve	Reminds you of purchase requests entered by employees that you need to approve. Clicking this reminder takes you to the Approve Purchase Requests page.
Receipts to Print	Reminds you of receipts to print.

Reminder	Description
Rejected Intercompany Purchase Orders	Reminds you of the rejected intercompany purchase orders.
Rejected Intercompany Vendor Returns	Reminds you of the rejected intercompany vendor returns.
Resource Allocations to Approve	Reminds you of resource allocations that you need to approve.
Return Authorization Requiring Revenue Commitment Reversals	Reminds you of the number of sales orders that need revenue commitments. Drills down to the Generate Revenue Commitment page.
Return Authorizations to Approve	Reminds you of returns you need to approve. Clicking this reminder takes you to the Approve Return Authorizations page filtered to show only returns you need to approve.
Return Authorizations to Print	Reminds you of return authorizations you need to print. Clicking this reminder takes you to the Return Authorizations page where you can select the authorization that needs to be printed.
Return Authorizations to Receive	Reminds you of returns you need to receive. Clicking this reminder takes you to the Receive Returns page.
Return Authorizations to Refund	Reminds you of returns you need to refund. Clicking this reminder takes you to the Credit Returns page.
Revenue Recognition Entries pending	Reminds you of revenue recognition entries that are pending. Clicking this reminder takes you to the Revenue Recognition Journal Entries page filtered to show only transactions for the current period.
Sales Orders Requiring Revenue Commitments	Reminds you of the number of sales orders that need revenue commitments. Drills down to the Generate Revenue Commitment page.
Sales Orders to Approve	Reminds you of sales orders you need to approve. Clicking this reminder takes you to the Approve Sales Orders page filtered to show only sales orders you need to approve.
Sales Orders to Bill	Reminds you of sales orders you need to bill. Clicking this reminder takes you to the Bill Sales Order page.
Sales Orders to Print	Reminds you of sales orders you need to print. Clicking this reminder takes you to the Print Sales Order page.
Solutions to Approve	Reminds you of knowledge base solutions you need to approve.
SuiteBundles to Update	Reminds you that one or more installed bundles have an updated version available. Clicking this reminder takes you to the Installed Bundles page, where you can click links to update bundles. This reminder is added by default for an account's administrators and users with SuiteBundler permission when the first bundle is installed in the account.
Tasks due today	Reminds you of tasks assigned to you that are due today. Clicking this reminder takes you to a tasks lists filtered to show only tasks due today.
Tasks that are overdue	Reminds you of tasks assigned to you that are overdue. Clicking this reminder takes you to a tasks list filtered to show only your overdue tasks.
Tasks to complete	Reminds you of tasks assigned to you that are not complete. Clicking this reminder takes you to a tasks list filtered to show only tasks you need to complete.

Reminder	Description
Time Records to Approve	Reminds you if you need to approve the time of subordinates. Clicking this reminder takes you to the Approve Time task.
Transfer Orders to Approve	Reminds you of transfer orders due to be processed. All transfer orders that are pending approval or pending fulfillment are included in this count. Clicking this reminder takes you to the Approve Transfer Orders page.
Vendor Return Authorizations to Approve	Reminds you of vendor returns you need to approve. Clicking this reminder takes you to the Approve Return Authorizations page filtered to show only returns you need to approve.
Vendor Return Authorizations to Refund	Reminds you of vendor returns you need to refund. Clicking this reminder takes you to the Refund Vendor Return Authorization page.
Vendor Return Authorizations to Return	Reminds you of vendor returns you need to send. Clicking this reminder takes you to the Ship Vendor Return Authorization page.
Work Orders to Build	Reminds you of assembly work orders you need to build.
Work Orders to Close	Reminds you of assembly work orders to close.

Creating Custom Reminders

If the reminders provided by NetSuite do not meet all of your needs, you can create your own reminders and add them to the Reminders portlet on your dashboard. Each reminder is based on a count of the results of a saved search.

To create a custom reminder, enable the Available for Reminders option on the saved search definition page. After this option is enabled, the saved search is listed as a reminder on the Set Up Reminders page, and you can choose to show it in the Reminders portlet.


To create a custom reminder:

1. Create a new saved search or edit an existing saved search. See the help topic [Defining a Saved Search](#).
2. On the saved search definition page, check the **Available for Reminders** box.

3. Make sure that the search name is suited for display in the Reminders portlet.
The search name is displayed in the Reminders portlet, with the format: `<number_of_results>
<saved_search_name>`
4. On the **Results** subtab of the saved search, check whether any summary types that group search results are included.

- Custom reminders work best for saved searches that do not have any grouped results because reminders are based on a count of the number of results and only display when this count is a non-zero integer.
 - If you set up a reminder for a saved search that groups results by a summary type other than a count, the reminder does not display.
 - You can define a count for a grouped field to make the reminder display, but the reminder result is affected by the grouping and may not include the total count of saved search results.
 - It may be best to remove summary types or recreate the search without summary types for use as a reminder.
 - For information about grouping search results with summary types, see the help topic [Summary Types for Search Results](#).
5. Click **Save** to save the search.

To add a custom reminder to the Reminders portlet:

1. Go to your home page. If this page does not include a Reminders portlet, click **Personalize Dashboard** and add it. See [Setting Up Reminders](#).
2. In the Reminders portlet menu, click **Set Up**.
3. In the **Type** menu, select **Custom**.
The custom reminders available in your account are displayed. Each custom reminder is marked with a  icon.
Note that all saved searches to which you have access are listed if the **Available for Reminders** box is checked. The list is not limited to searches you have created. See the help topic [Accessing a Saved Search](#).
4. Click a reminder in the left list or drag it to the **Current Selections** list on the right.
5. You can change the order in which reminders appear in the Reminders portlet by dragging them up or down in the list.
6. If you want a reminder to be used as a headline reminder, drag it under the **Headline**.
Headline reminders are displayed in the upper part of the portlet and use a more prominent layout.
7. If you want the reminders to be shown even when there are no results to display, select **Show reminders with zero results**.
8. When ready, click **Save**.

The Reminders portlet displays a count of search results. Click a custom reminder to see detailed search results and complete related tasks.



Note: If a custom reminder causes an error that prevents the Reminders portlet from displaying reminder links properly, click **Set Up** in the Reminders portlet's menu, remove the reminder from the Current Selections list, and click **Save**.

Example Custom Reminder

Custom reminders are based on saved search results, which enables you to include more fine-tuned reminders in your dashboard. This can be especially helpful when you need reminders for custom record types, because system-defined reminders are not provided for custom records.

For example, if your account has an equipment custom record type that includes Last Service field, and you are in charge of keeping Equipment services on regular basis, you can set up a saved search and custom reminder to determine if the Last Service of Equipment is within the last Fiscal Year.

To set a custom reminder for servicing Equipment:

1. Go to Reports > Saved Searches > All Saved Searches > New, and choose **Equipment**.
2. A saved search definition page opens.
3. Enter a meaningful name for the search.
4. Check the **Available for Reminders** box.
5. On the **Criteria** subtab, define a filter for the Last Service field to include equipment records with a Last Service is within last fiscal year.
6. On the **Results** subtab, choose the columns to be displayed in search results.
7. Save the search.

The screenshot displays the 'Saved Equipment Search' configuration page. At the top, there's a navigation bar with tabs: Activities, Transactions, Lists, Reports, Customization, Documents, Setup, Training, and Support. The main heading is 'Saved Equipment Search' with subtext 'Equipment Search'. Below this are buttons for 'Save', 'Reset', 'Cancel', 'Preview', 'Pivot Report', and an 'Actions' dropdown. The 'Search Title' field contains 'Last Equipment Service'. There are checkboxes for 'Public', 'Available as List View', 'Available as Dashboard View', 'Available as Sublist View', 'Available for Reminders', and 'Show in Menu'. The 'Criteria' subtab is active, showing sorting options: 'Sort By' (Name), 'Then By' (Last Service), and 'Then By' (empty). The 'Output Type' is set to 'Normal'. There are checkboxes for 'Show Totals', 'Run Unrestricted', 'My Preferred Search Results', and 'Disallow Drill Down'. The 'Columns' section shows a table with columns: FIELD, SUMMARY TYPE, FUNCTION, FORMULA, WHEN ORDERED BY FIELD, CUSTOM LABEL, CUSTOM LABEL TRANSLATION, SUMMARY LABEL, and SUMMARY LABEL TRANSLATION. The 'Name' column is selected. At the bottom, there are buttons for 'Add', 'Cancel', 'Insert', 'Remove', 'Move Up', 'Move Down', 'Move To Top', and 'Move To Bottom'.

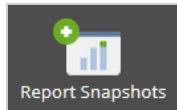
8. Go to your Home page. If this page does not include a Reminders portlet, click **Personalize Dashboard** and add it. See [Setting Up Reminders](#).
9. In the Reminders portlet, click **Set Up**.
10. Click the new reminder on the left to move it to the right, and then click **Save**.
11. Review the Reminders portlet on your Home page.
12. Click the reminder link to see the list of expiring warranties and the information you need to renew them.

Report Snapshot Portlets

Report Snapshot portlets can show summaries of some reports that are available to you. You can choose among standard report snapshots or create custom report snapshots.

To add a Report Snapshot to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Report Snapshots** tab of the **Personalize Dashboard** palette, click the **Report Snapshots** icon or drag it onto the dashboard.



3. Click the **Set Up** link in the portlet menu and select the report snapshot you want to display from the **Snapshot** list.
4. Click **Save** to update the portlet content.

For a list of standard report snapshots, see [Standard Report Snapshots Table](#).

To learn how to create custom report snapshots, see [Creating Custom Report Snapshots](#).

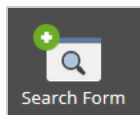
For more information about report snapshots, see [Report Snapshots Overview](#).

Search Form Portlet

If you have a saved search that is used as your preferred search form, you can add this search as a portlet to your dashboard. To learn how to define a saved search as a preferred search form, see the help topic [Defining a Saved Search as a Preferred Search Form](#).

To add a Search Form portlet to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **Search Form** icon or drag it onto the dashboard.



3. Click the **Set Up** link in the portlet or the portlet menu and use the **Search** list to select the search form you want to display in the portlet.

You can also display personalized search forms on your dashboard. For details, see the help topics [Personalizing a Search Form](#) and [Adding Personalized Search Forms to NetSuite Pages](#).

Settings Portlet

The Settings portlet shows links to user-level setup tasks. The links that appear in the portlet are system-defined and cannot be edited, and the portlet itself cannot be removed from the dashboard.

The links that appear in the portlet vary by role and may include the following:

- **Personalize Dashboard** — Opens the Standard Content tab of the Personalize Dashboard palette, which lets you add portlets to the dashboard. For more information, see [Dashboard Personalization](#).
- **Set Preferences** — Opens the Set Preferences page, which lets you edit your preferences for different areas of NetSuite. For more information, see the help topic [Setting Personal Preferences](#).
- **Change Email** — Opens the Change Email page, which lets you change the email address associated to your NetSuite account. For more information, see the help topic [Change Email Link](#).
- **Change Password** — Opens the Change Password page, which lets you change the password you use to access NetSuite. For more information, see the help topic [Change Password Link](#).


- **Update Security Questions** — Opens the Update Security Questions screen, which lets you change the security questions associated to your NetSuite account. For more information, see the help topic [Update Security Questions Link](#).

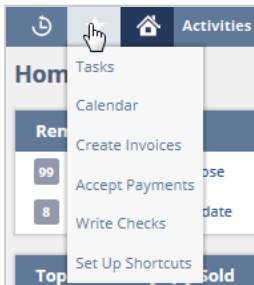
Other links that may appear in the portlet depending on your permissions and the features that have been enabled in your NetSuite account include:

- **Publish Dashboard** — Opens the Publish Dashboard page, which lets you publish a dashboard for other users who log in to the same center you are currently in. For more information, see [Publishing Dashboards Overview](#).
- **Set Up NetSuite for Outlook** — Opens the Set Up NetSuite for Outlook page, which lets you access the NetSuite for Outlook installer. After it is installed, NetSuite for Outlook enables you to synchronize your Microsoft Outlook™ email, events, contacts, and tasks with your NetSuite account. For more information, see the help topic [NetSuite for Outlook](#).
- **Set Up SuiteAnalytics Connect** — Opens the SuiteAnalytics Connect Driver Download page, which lets you download a SuiteAnalytics Connect Driver. After it is downloaded and installed, the driver enables you to connect to the Connect Service which, in turn, lets you archive, analyze, and report on NetSuite data using third-party tools such as Microsoft™ Excel, BIRST and Adaptive. For more information, see the help topic [SuiteAnalytics Connect](#).

Note: If you do not see a link in the Settings portlet that you think you should have access to, contact your system administrator.

Shortcuts Portlet

The Shortcuts portlet contains links that you can click for easy access to your most frequently used records, transactions, lists, and/or reports. These same links also appear as options on the shortcuts menu, the star icon  on the navigation menu.



You can add, remove, and change the order of shortcut links in the Shortcuts portlet and shortcuts menu. You can also set up shortcuts to open linked pages in new windows. Any changes you make are applied to both the Shortcuts portlet and the shortcuts menu options.

For instructions on how to add the Shortcuts portlet to a page, see [Adding a Portlet to a Dashboard](#).

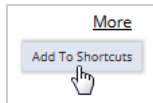
Important: If you have added the Shortcuts portlet to more than one page, the portlet always maintains the same links on every page. Any changes you make to the Shortcuts portlet displayed on one page are applied automatically to the Shortcuts portlet displayed on any other page and to the menu options listed on the shortcuts menu.

Adding Shortcut Links

You can use either of the following methods to add a link to the Shortcuts portlet and shortcuts menu. Go to the page where you want the shortcut link to go, and click More > Add to Shortcuts. Or go to the Shortcuts portlet itself, and click its New Shortcut link.

To add a shortcut from the page where you want the shortcut to go:

1. On the page's **More** menu, click **Add To Shortcuts**.



2. Edit name for the shortcut link. By default it is the name of the page.
3. If you want the linked page to open in a new window, check the **Open in New Window** box.
4. Click **Save**.

To add a shortcut from the Shortcuts portlet:

1. On the Shortcuts portlet, click **New Shortcut** on the portlet menu.
2. Enter a name for the shortcut link.
3. Enter the **URL** for the page. (If you do not know the page's URL, go to the page and use the **Add To Shortcuts** link on the page instead.)
4. If you want the linked page to open in a new window, check the **Open in New Window** box.
5. Click **Save**.

Setting Up Shortcut Links

In the Set Up Shortcuts popup window, you can remove, reorder, and rename shortcuts. You can also indicate that they should open in new windows.

ENABLE	LABEL	EXTERNAL URL	OPEN IN NEW WINDOW
<input checked="" type="checkbox"/>	Tasks		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Calendar		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Create Invoices		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Accept Payments		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Write Checks		<input type="checkbox"/>

To remove a shortcut:

1. Click the **Set Up** link in the Shortcuts portlet menu or the **Set Up Shortcuts** option on the shortcuts menu to open the Set Up Shortcuts popup window.
2. Clear the **Enable** box next to each shortcut that you want to remove.

Note: Shortcuts that were created when a dashboard was published for you appear with asterisks. The publisher may have restricted these shortcuts so that you cannot remove them.

3. Click **Save**.

To reorder shortcut links:

1. Click the **Set Up** link in the Shortcuts portlet menu or the **Set Up Shortcuts** option on the shortcuts menu to open the Set Up Shortcuts popup window.
2. Click the shortcut row to select it. The selected row is highlighted and has a drag gripper, outlined in red below.

Move To Top		Move To Bottom	
ENABLE	LABEL	EXTERNAL URL	OPEN IN NEW WINDOW
<input checked="" type="checkbox"/>	Tasks		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Calendar		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Create Invoices		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Accept Payments		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Write Checks		<input type="checkbox"/>

3. Drag the shortcut row where you want it or use the **Move to Top** or **Move to Bottom** buttons.
4. Click **Save**.

To indicate that a shortcut's linked page should open in a new window:

1. Click the **Set Up** link in the Shortcuts portlet menu or the **Set Up Shortcuts** option on the shortcuts menu to open the Set Up Shortcuts popup window.
2. Check the **Open in New Window** box next to the shortcut name, and click **Save**.

To rename a shortcut link:

1. Click the **Set Up** link in the Shortcuts portlet menu or the **Set Up Shortcuts** option on the shortcuts menu to open the Set Up Shortcuts popup window.
2. Change the name in the **Label** field, and click **Save**.

Note: The Shortcuts portlet may contain duplicate links if your administrator has published a dashboard with links that match the custom links you have added. To eliminate duplicates, remove your own custom links.

SuiteApp Portlets

If you have a dashboard-compatible SuiteApp installed in your account, you can display this SuiteApp on your dashboard as a portlet.

To be available as a dashboard portlet, a SuiteApp must meet the following requirements:

- It must be installed in your account.
- It must include a dashboard component.

Note: SuiteApp portlets cannot be added to custom dashboards.

To add a SuiteApp portlet:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.

2. On the **SuiteApps** tab of the **Personalize Dashboard** palette, click the SuiteApp you want to add or drag it onto the dashboard.

You can add up to six SuiteApp portlets to your dashboard.

For more information about SuiteApp portlets, see the help topic [Displaying SuiteApps on Your Dashboard](#).

Tasks Portlet

If you want to show a list of Tasks on your dashboard, you can add a Tasks portlet from the Personalize Dashboard palette.

Tasks			
Total: 1	View Dashboard ▼	Quick Sort Due Date ▼	
NEW	EDIT VIEW	DUE DATE ▲	TASK TITLE
Edit View	7/23/2014	Sales Meetings	

You can view tasks using the Dashboard view or the Basic view. Basic view enables you to filter tasks by status and priority as well as view tasks assigned to other users by choosing the assignee from the Assigned To list.

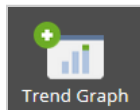
You can also sort tasks by: In Order, Due Date, Recently Created, Recently Modified, or Recently Viewed.

Trend Graph Portlets

Trend graphs show the differences in Key Performance Indicators (KPIs) data over time. You can add up to five Trend Graph portlets to your dashboard.

To add a Trend Graph portlet to your dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard or use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Trend Graphs** tab of the **Personalize Dashboard** palette, click the **Trend Graph** icon or drag it onto the dashboard.



3. Click the **Set Up** link in the portlet or in the portlet menu and use the **KPI** list to select the KPI to be used for this trend graph.

To learn more about trend graphs and displaying them on your dashboard, see [Trend Graphs](#).

Printing and Exporting Dashboard Content

You can print or export content from some dashboard portlets. These options are usually in the same menu as the Set Up option in the portlets where they are available. The following table lists the portlets that support these options.

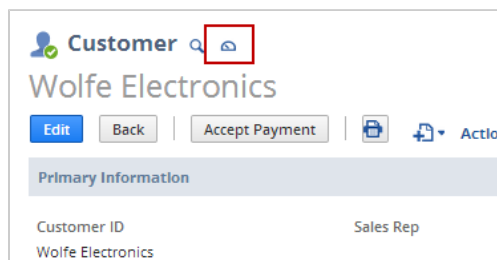
Portlet Type	Supported Print/Export Options	Notes
KPI Meter	<ul style="list-style-type: none"> Print the chart Download PNG image Download JPG image Download PDF document Download SVG vector image 	Available from portlet menu.
KPI Scorecard	<ul style="list-style-type: none"> Export (data to CSV file) 	Available from portlet menu.
Report Snapshot	<ul style="list-style-type: none"> Print the chart Download PNG image Download JPG image Download PDF document Download SVG vector image 	Available from portlet menu.
Trend Graph Portlet	<ul style="list-style-type: none"> Export (data to CSV file) Print the chart Download PNG image Download JPG image Download PDF document Download SVG vector image 	Available from portlet menu.
Trend Graph Pop-Up Window	<ul style="list-style-type: none"> Export (data to CSV file) Print the chart Download PNG image Download JPG image Download PDF document Download SVG vector image 	<ul style="list-style-type: none"> The Trend Graph pop-up window is available on some portlets, including KPI Scorecard and Key Performance Indicators portlets. Export link is available from the Trend Graph window. Print and download options are available from the Trend Graph window menu.

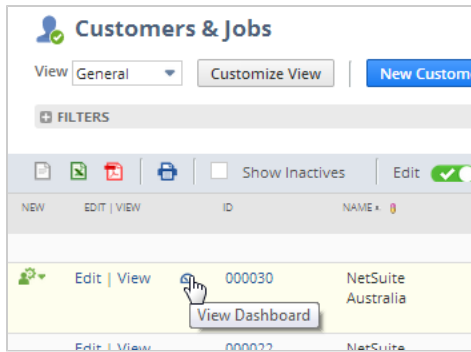
Customer Dashboards

NetSuite includes a specialized dashboard that is available for every customer (including leads and prospects) in your system. The customer dashboard provides at-a-glance access to key customer's data, so you do not need to search through multiple screens to gather and piece together the information you need.

To open a dashboard for a customer, you can:

- Click the View Dashboard icon on a Customer record or on a row in a customer list:





- Enter `dash:customer_name` in the Global Search field at the top of the NetSuite page.

Setting the Customer Dashboard as Default View

If you prefer to look at all customer records using the dashboard view, you can set the preference to make this the default view whenever you open a customer record. To do this, go to Home > Set Preferences > Appearance > Set Customer Dashboard as Default View on Customer Record.

By default, a customer dashboard includes a Key Performance Indicators portlet displaying important summary data for the customer, a Dashboard Links portlet with links to reports related to the customer, and a list portlet displaying the customer's transactions, as well as other portlets. You can personalize customer dashboard portlets' content and setup.

- Choose Set Up from the portlet menu to modify the portlet's configuration. For more information, see [Setting Up Dashboard Portlet Content](#) and [Setting Up the Key Performance Indicators Portlet](#).
- To add portlets, see [Adding a Portlet to a Dashboard](#).

You can add a custom portlet that displays results from a SuiteScript, such as custom lists, data entry forms, or free-form HTML. To ensure that the custom portlet provides data for the selected customer, pass the customer's entity ID to the SuiteScript function. See the help topics [Portlet Scripts](#), [Portlet Script Execution](#), and [Displaying Portlet Scripts on the Dashboard](#).

A customer dashboard includes information about all transactions and activities for the customer's related projects and subcustomers. The customer dashboard's Transactions portlet data is consistent with the customer record's Transactions subtab data, and the customer dashboard's Key Performance Indicators portlet data is consistent with the customer record's Financial subtab data.

Note that the setting for the Accept Payments Through Top-Level Customer preference affects the rollup of data for some customer dashboard KPIs, in the same manner that it affects the customer record's Financial tab data. For more information about this preference, see the help topic [Consolidated Payments](#).

Key Performance Indicators Overview

Key Performance Indicators, or KPIs, synthesize your raw data into critical business metrics that you can see right on your dashboard in the formats you choose. KPIs enable you to spend more time learning from and acting on important data and less time gathering it. NetSuite includes over 75 prepackaged KPIs based on NetSuite standard reports, including summaries of forecast, pipeline, orders, cases, and financial data. You also can create custom KPIs, based on custom saved searches.

NetSuite provides the following types of dashboard portlets where you can display key performance indicators:

- **Key Performance Indicators portlet.** This portlet displays a summary line for each selected KPI, with clickable links that drill down into each KPI's underlying data source.
 - For information about adding a Key Performance Indicators portlet to a dashboard, and choosing KPIs and layout options for the portlet, see [Setting Up the Key Performance Indicators Portlet](#).
 - For a list of the standard KPIs available from NetSuite, see [Standard Key Performance Indicators Table](#).
 - For a summary of what you can see in the Key Performance Indicators portlet, see [Viewing Key Performance Indicator Data](#).
 - For tips on displaying your own KPIs, see [Custom KPIs](#).
- **KPI Meter portlet.** This portlet displays a visual representation of KPI data, a semi-circular meter providing comparison, date range, and threshold values at a glance. For more information, see [KPI Meters](#).
- **Trend Graph portlet.** This portlet displays a chart of KPI data values over selected time intervals. This chart type can be Area, Line, Bar, or Column. Comparisons can be shown in continuous or side-by-side manner. Popup trend graphs also are available from clickable icons in the Key Performance Indicators portlet and the KPI Scorecard portlet. For information, see [Trend Graphs](#).
- **KPI Scorecard portlet.** This portlet displays a performance scorecard that can include complex comparisons among multiple KPIs over multiple date ranges or accounting periods. Scorecards also can include Excel-like formulas with KPIs and functions in their expressions. For information, see [KPI Scorecards Overview](#).

KPIs are role-based and feature-based, meaning the KPIs that you can choose to display depend upon the role you used to log in to NetSuite and the features that are enabled.

Setting Up the Key Performance Indicators Portlet

If you want to display KPI data on a dashboard, the first step is to add the Key Performance Indicators portlet to the page if it is not already there.

When the Key Performance Indicators portlet appears on a page, you can click the portlet's Set Up link and define its contents and layout in the Set Up Key Performance Indicators popup window.

The KPIs that are available to you in the Set Up Key Performance Indicators popup window depend upon the role you used to log in to NetSuite and the features that are enabled.

For more information, see the following:

- [Adding the Key Performance Indicators Portlet](#)
- [Making Changes to the Key Performance Indicators Portlet](#)
- [Choosing KPIs and Setting Layout Options](#)

Adding the Key Performance Indicators Portlet

To add the Key Performance Indicators portlet:

1. Click the **Personalize Dashboard** link on the page.
2. Click or drag and drop the **Key Performance Indicators** item.

The portlet appears on the page, displaying default or previously selected KPI data.

Making Changes to the Key Performance Indicators Portlet

You can make the following changes to the Key Performance Indicators portlet:

- You can select the standard and/or custom KPIs that appear in the portlet.
- You can select the period of time for which you want KPI data to be synthesized.
- You can choose to display comparisons of KPI data across different time periods, with percentage changes calculated automatically.
- You can choose to highlight displayed KPI data that exceeds or falls short of a threshold that you define.
- You can set some KPI data to appear in the portlet header.
- You can determine the order in which KPIs appear in the portlet.
- For KPIs that provide time-based comparisons of data, you can define layout options for the popup trend graphs that are available from Trend Graph icons.
- You may be able to choose whether to display data for all employees or employees in your team.

Choosing KPIs and Setting Layout Options

To define KPIs and layout options for the Key Performance Indicators portlet:

1. In the Key Performance Indicators portlet, click **Set Up** to open the Set Up Key Performance Indicators popup.
2. To select standard KPIs for display in the portlet, click **Add Standard KPIs** to open the Choose Standard Key Performance Indicators dialog.
 - Click a KPI in the left list to move it to the right list, which indicates that it should be displayed.
 - Click **Done** after you have finished selecting KPIs to display.
 - Selected standard KPIs are listed with question mark icons. Click these icons for KPI descriptions. For a complete list of standard KPIs and their descriptions, see [Standard Key Performance Indicators Table](#).
3. To select saved searches to display as custom KPIs, click **Add Custom KPIs** to open the Choose Custom Key Performance Indicators dialog.
 - Click a saved search in the left list to move it to the right list, which indicates that it should be displayed as a custom KPI.
 - You can choose up to 10 custom KPIs.
 - Click **Done** when you have finished selecting KPIs for display.
 - Selected custom KPIs are listed with "c" icons. Click an icon for a brief general description of custom KPIs. For more details, see [Custom KPIs](#).
4. For each selected KPI, in the **Range** list, select the date or period range for which data should be included.

5. For each selected KPI, if an **Employees** list is available, select one of the following:
 - **All** – Includes KPI data for all employees in your organization.
 - **Only Mine** – Includes data only from employees in your group in a selected KPI.
 - **My Team's** – Includes only KPI data that is relevant to employees in your team.
6. For each selected KPI, in the **Highlight If** list, select **greater than** or **less than** if you want to highlight data that exceeds or falls short of a defined threshold. If you do not want highlighting for this KPI, leave the list blank.
 - If you have made a selection from the **Highlight If** list, specify the threshold number in the **Threshold** column.
 - If you want the selected KPI data to be highlighted in the portlet's header, select the check box in the **Headline** column.
7. For each selected KPI, in the **Compare** column, check the box if you want to compare results from the time period defined in the **Range** list with results from another period defined in the **Compare Range** list.
8. For each selected KPI, in the **Compare Range** list, if you checked the **Compare** box, select the date or period range for which data should be compared with data from the first range. If you did not check the **Compare** box, you do not need to make a selection here.
9. You can remove a selected KPI from the Key Performance Indicators portlet by clicking its **x** button at far right. Click **Remove All** button to remove all selected KPIs.
10. You can change the order in which KPIs appear in the Key Performance Indicators portlet by using the **Move To Top** and **Move To Bottom** buttons or by dragging and dropping individual KPIs.
 - To drag and drop a KPI, click it and hold down the mouse button until you see the crossed arrows and the KPI is highlighted gray. Continue holding down the mouse button, moving the pointer to the location where you want the KPI to appear. Then release the mouse button.
 - To use one of the **Move** buttons, select a KPI by clicking on it and holding down the mouse button until you see the crossed arrows and the KPI is highlighted gray. Then click either of the **Move** buttons.
11. To change display options for KPIs' popup trend graphs, click the **Popup Trend Graphs** subtab. Check or clear the **Show Moving Average**, **Show Last Data Point on Pop-Up Trend Graphs**, or **Include Zero on Y-Axis** boxes. You also can set the chart theme and background for all popup trend graphs, as well as default chart type and time increment. For information about these options, see [Setting Up Popup Trend Graphs](#).
12. If you do not want the portlet content to be refreshed automatically when you log in to NetSuite, select the **Cached Data** option.
 This option also adds a time indicator that appears when you point to the portlet title, so you can see when the portlet was last updated.
13. Click **Save**.

You can now review the data displayed in the Key Performance Indicators portlet. To make further changes, click the portlet's **Set Up** link and redo the steps above as needed. For tips about what you can do in the portlet, see [Viewing Key Performance Indicator Data](#).

Viewing Key Performance Indicator Data

After you have added a Key Performance Indicators portlet to a dashboard, clicked the **Set Up** link, and performed setup tasks on the **Set Up Key Performance Indicators** page, you can perform the following functions from within the portlet or on the dashboard.

Key Performance Indicators				
Income	Expenses	Receivables	Inventory	
↑ 7.4%	↑ 0.3%	↑ 4.9%	↑ 3.1%	
INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Income	Last Fiscal Year vs. Last Period	\$59,238,625	\$55,157,007	7.4%
Expenses	This Fiscal Year vs. Last Period	\$671,521	\$673,542	0.3%
Receivables	This Period vs. Last Fiscal Year	\$2,802,228	\$2,671,333	4.9%
Inventory	This Period vs. Last Period	\$9,668,649	\$9,377,273	3.1%
Other Current Assets	This Period vs. Last Period	\$7,011,939	\$7,011,279	0.0%

View comparisons of data from different periods:

If you have defined time ranges for comparisons in the Set Up Key Performance Indicators page, you can view percentage changes for KPIs. An arrow indicates the direction of each change, and positive changes appear in green, whereas negative changes appear in red. For instructions for setting up comparisons, see [Setting Up KPI Comparisons](#).

View highlighted data:

If you have defined goal amounts as thresholds for KPIs in the Set Up Key Performance Indicators page, you may notice that some KPIs appear in bold text with red flags because they have either exceeded or fallen short of goals. For more information, see [Highlighting KPIs](#).


Drill down to underlying data:

Each standard KPI's data is based on a snapshot of a NetSuite report. Each custom KPI's data is based on a saved search. The Key Performance Indicators portlet provides multiple links for each KPI that you can click to open its underlying report or saved search. You can find one of these links by moving your cursor over a KPI and clicking when you see a pointing hand and underlined text.

Note: For KPIs based on financial and sales reports, totals are always rounded to the nearest whole number currency amount. You can drill down to the report to view the exact totals for that report.

View trend graphs:

For any KPI that includes a time-based comparison, you can click its Trend Graph icon to open a popup trend graph for that KPI. You can change the time period graphed by clicking options in the graph's popup window or change the graph's layout options in the Set Up Key Performance Indicators popup. For more information, see [Trend Graphs](#).

Key Performance Indicators	
INDICATOR	PERIOD
Opportunities Won	This Month vs. Last Month to Date
 Total Open Estimates	Today vs. One Month Ago
Pipeline (Projected)	This Month vs. Last Month to Date
Quota (Billings)	This Month vs. Last Month
Forecast (Billings)	This Month

Move the Key Performance Indicators portlet:

You can drag and drop the Key Performance Indicators portlet to move it to a different place on the dashboard. Note that when this portlet is in the left or right column of your dashboard, its display is condensed so that individual Refresh icons and headline comparisons are not available. For a fuller display with these options, move the portlet to the center column.

Minimize the Key Performance Indicators portlet:

You can minimize the Key Performance Indicators portlet so that its data is not loaded immediately when a page opens, avoiding a lot of waiting for slow-loading KPI data. To minimize the portlet, click its title bar. When the page is loaded, you can click the portlet's title bar again to display KPI data as needed.

Change KPI data setup:

You can click the Set Up link in the portlet menu at any time to open the Set Up Key Performance Indicators popup and change the contents and layout of the portlet.

Setting Up KPI Comparisons

A variety of date ranges is available for KPI comparisons. Many additional date ranges and period ranges are available for comparisons in KPI scorecards. See [Date Ranges for KPI Scorecards](#) and [Period Ranges for KPI Scorecards](#).

To set up KPI comparisons:

1. Click **Set Up** in your Key Performance Indicators portlet's menu.
2. In the Set Up Key Performance Indicators popup, if the KPI is not displayed, click **Add Standard KPIs** or **Add Custom KPIs**, select the KPI, and click **Done**.
3. In the **Range** column for the KPI, choose the first period of time for which data should be included in the KPI.
4. Check the box in the **Compare** column.
5. In the **Compare Range** column, choose the second time period for which data should be included in the KPI (and compared with the first period's data).
6. Repeat steps 2 through 5 for each indicator that you want to include a comparison.
7. Click **Save**.

After these setup steps, the KPI in your Key Performance Indicators Portlet now displays columns for the current period's metric, the previous period's metric, and the percentage change.

If you have set up a comparison for custom KPI and results are not displaying properly, the saved search on which the custom KPI is based may not satisfy related requirements. The saved search definition must:

- Not include any date fields defined as filters on the Criteria subtab
- Have only one field with a summary type (such as group, sum, or count) defined on the Results subtab.
- Have a date field defined as an available filter on the Available Filters subtab.

For more information, see [Custom KPIs](#).

Highlighting KPIs

You can call out specific KPIs when they are above or below your goals, to more quickly notice and manage business issues.

For example, Alexa Wolfe's goal this month is to have sales over \$40,000. If her company reaches this goal, she wants to reward her team with dinner. To see this information in her KPI portlet, Wolfe chooses to highlight her Sales indicator when it is over \$40,000.

To call out KPIs, you can define goal amounts as thresholds in the Set Up Key Performance Indicators popup. Then, if the KPI amount is greater than or less than the defined threshold amount, the KPI is highlighted in the Key Performance Indicators portlet, by appearing in bold text with a red flag. You also can indicate that a highlighted KPI can be displayed as a headline for the Key Performance Indicators portlet, meaning it is displayed at the top of the portlet in large, bold text.

To highlight KPIs:

1. Click **Set Up** in your Key Performance Indicators portlet.
2. In the Set Up Key Performance Indicators popup, if the KPI is not displayed, click **Add Standard KPIs** or **Add Custom KPIs**, select the KPI, and click **Done**.
3. In the **Range** column for the KPI, select the date or period range you want to report on for this metric.
4. In the **Highlight If** column, choose to call out this indicator if it is **greater than** or **less than** a threshold you set.
5. In the **Threshold** column, enter the threshold this indicator must exceed or fall below to be highlighted.
6. In the **Headline** column, check the box if you want this KPI to be displayed as a headline at the top of the Key Performance Indicators portlet in large, bold text.
7. Repeat the preceding steps for each indicator you want to highlight.
8. Click **Save**.

KEY PERFORMANCE INDICATOR	RANGE	HIGHLIGHT IF...	THRESHOLD	HEADLINE	COMPARE	COMPARE RANGE
(C) Sales	This Fiscal Quarter	Greater Than	40,000.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Last Fiscal Quarter
(C) Orders	this month			<input type="checkbox"/>	<input checked="" type="checkbox"/>	last month
(C) Payables	This Fiscal Quarter			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Last Fiscal Quarter
(C) Receivables	This Fiscal Quarter			<input type="checkbox"/>	<input checked="" type="checkbox"/>	Last Fiscal Quarter

After these setup steps, a KPI that either exceeds or falls short of its defined threshold value displays in bold text. If the Headline box is checked, the KPI is also displayed as a headline for the Key Performance Indicators portlet.

Note: Up to four KPIs can be displayed as headlines.




Standard Key Performance Indicators Table

Depending on your role and your account's enabled features, some or all of the following table's KPIs are available for display in the Key Performance Indicators portlet. If you see a KPI in the table that is not available to you in NetSuite and that you would like to display, check with your administrator to see if the related feature can be enabled, or if you can use another role to log in to NetSuite.

The table lists KPIs in alphabetical order.


KPI	Description
Authorized Commission	This indicator shows the total outstanding commission amount that has been authorized but not paid, as of the selected date range. Click this KPI's period or total to open the Authorized Commission Summary Report .
Authorized Partner Commission	This indicator shows the total outstanding commission amount that has been authorized but not paid to partners, as of the selected date range. Click this KPI's period or total to open the Authorized Partner Commission Summary Report .
Average Days to Pay	(Available on the Customer Dashboard only) This indicator shows the customer's average number of days between invoice date and the payment date for the selected period(s). Click this KPI's periods or totals to open the A/R Aging Detail Report .
Average Days Overdue	(Available on the Customer Dashboard only) This indicator shows the average number of days that the customer had an overdue balance for the selected period(s). The formula for this KPI is the average number of days that invoices are overdue, weighted by the amount of the invoices. For example, if the time now is 3:00:10pm: an invoice for \$100 open for 5 days and a second invoice for \$200 open for 10 days, the KPI shows $((5+54010/86400)*100 + (10+54010/86400)*200)/300 = 8.9584490740740740740740740741$. The 54010 is the number of seconds since midnight of 3:00:10pm, and 86400 is the number of seconds in a day. So the invoice is not 5 days overdue, but is 5.6251157407407407407407407407 days overdue. The number in the dashboard changes every second. Click this KPI's periods or totals to open the A/R Aging Detail Report .
Balance	(Available on the Customer Dashboard only) This indicator shows the current dollar amount owed by the customer. Click this KPI's periods or totals to open the A/R Aging Detail Report .
Bank Balance (May display as Total Bank Balance)	This indicator shows the total impact on bank accounts, as of the selected period(s). Click this KPI's periods or totals to open either the Balance Sheet Report or the Bank Register Report . (Your account setup determines which report is the basis for this KPI. Click the Support by Phone button to understand your account settings.)
Cart Abandonment	This indicator shows the percentage difference between the number of Web store shopping carts filled and the number of orders actually placed during the selected date range. Click this KPI's periods or totals to open the Shopping Cart Abandonment Report .
Cases Closed	This indicator shows the number of cases closed during the selected date range(s). Click this KPI's periods or totals to open the Closed Cases Snapshot report.
Cases Escalated	This indicator shows the number of cases that have been escalated within the selected date range(s). Click this KPI's periods or totals to open the Open Case Escalation Summary Report report.
Checkout Abandonment	This indicator shows the percentage of web store checkouts that were started but not completed during the selected date range(s). This calculation divides the total number

KPI	Description
	of times the checkout process was started by the number of successfully completed checkouts. Click this KPI's periods or percentage totals to open the Shopping Cart Abandonment Report .
Closed Issues	This indicator shows the number of issues that have been closed within the selected date range(s). Click this KPI's periods or totals to open the Closed Issues Summary Report report.
COGS	This indicator shows the dollar value of the cost of goods sold in transactions during the selected period(s). Click this KPI's periods or totals to open the Income Statement Report .
Consolidated Average Days Overdue	(Available on the Customer Dashboard only, when the Consolidated Payments feature is enabled.) This indicator shows the average number of days that the customer and its subcustomers had an overdue balance for the selected period(s). Click this KPI's periods or totals to open the A/R Aging Detail Report .
Consolidated Balance	(Available on the Customer Dashboard only, when the Consolidated Payments feature is enabled.) This indicator shows the current dollar amount owed by the customer and its subcustomers. Click this KPI's periods or totals to open the A/R Aging Detail Report .
Consolidated Days Overdue	(Available on the Customer Dashboard only, when the Consolidated Payments feature is enabled.) This indicator shows the current number of days that the customer and its subcustomers have had an overdue balance. Click this KPI's period or total to open the A/R Aging Detail Report .
Consolidated Overdue Balance	(Available on the Customer Dashboard only, when the Consolidated Payments feature is enabled.) This indicator shows the amount of the current overdue balance for the customer and its subcustomers. Click this KPI's Current link or total to open the A/R Aging Detail Report .
Consolidated Unbilled Orders	(Available on the Customer Dashboard only, when the Consolidated Payments feature is enabled.) This indicator shows the total amount of orders for the customer and its subcustomers that have been placed but not billed for the selected period(s). Click this KPI's periods or totals to open the Open Sales Orders Report .
Credit Card Balance	This indicator shows the total impact on credit card accounts during the selected period(s). Click this KPI's periods or totals to open the Trial Balance Report .
Custom KPIs	Each of these indicators shows a total or count based on the results of a saved search. You add a custom KPI by selecting the saved search for which you want to display results. You can define up to 10 custom KPIs to display in the portlet. Click a custom KPI's periods or totals to open its underlying saved search results.
Days Overdue	(Available on the Customer Dashboard only) This indicator shows the current number of days that the customer has had an overdue balance. Click this KPI's period or total to open the A/R Aging Detail Report .
Deferred Revenue	This indicator shows the total credits and debits to deferred revenue accounts during the selected period. Click this KPI's periods or totals to open the Balance Sheet Report .
Employees	This indicator shows the number of active employees included in payroll with a hire date in the past and no release date, as of the selected date range(s). Click this KPI's periods or totals to open search results of employees that meet the above conditions.

KPI	Description
	 Note: This KPI is intended to list employees from a payroll point of view, so its results may differ from the complete list of employees shown at Lists > Employees > Employees.
Equity	<p>This indicator shows the dollar value of assets less liabilities for the selected period(s). Click this KPI's periods or totals to open the Balance Sheet Report.</p>
Estimated Commission	<p>This indicator shows the total value of estimated commissions for all transactions in the selected date range(s). Only commissions earned by you and your subordinates appear in this indicator. Click this KPI's periods or totals to view the Estimated Commission Summary Report. See also Commission Overview Report.</p>
Estimated Partner Commission	<p>This indicator shows the total estimated value of commissions earned by partners for transactions during the selected date range(s). Click this KPI's periods or totals to open the Estimated Partner Commission Summary Report. See also Commission Overview Report.</p>
Expenses	<p>This indicator shows the total debits to income and expense accounts during the selected period(s). Click this KPI's periods or totals to open the Income Statement Report.</p>
Fixed Assets	<p>This indicator shows the total dollar value of fixed assets, meaning durable property or equipment that will not be used up or converted to cash within a year, for the selected period(s). Click this KPI's periods or totals to open the Trial Balance Report.</p>
Forecast (This KPI is labeled Forecast (Billings) on the Customer Dashboard.)	<p>This indicator shows total sales within the selected date range(s), including the following transactions:</p> <ul style="list-style-type: none"> ■ Total income and reimbursed expenses from customers ■ Total value of open estimates that are set to be included in the forecast and are expected to close in the selected date range(s) ■ Total value of open opportunities that are expected to close in the selected date range(s) and do not include an estimate that is set to appear in the forecast <div>  Note: The values of estimates and opportunities included in forecasts depend on the preferences defined at Setup > Sales > Preferences > Sales Preferences, Forecasts subtab. </div> <p>This KPI can display a comparison of two different date ranges if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab. Click this KPI's periods or totals to open the Billings Forecast vs. Quota Report.</p>
Forecast (Alt. Sales)	<p>This indicator shows the total sales forecast, based on alternate sales amounts (ASA), for the selected date range(s). This KPI can display a comparison of two different date ranges if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab. Click this KPI's periods or totals to open the Alt. Sales Forecast vs. Quota Report.</p> <div>  Note: When The ASA feature is enabled, sales reps can track two different forecasts, one based on billings, and one based on ASA. </div>
Forecast Override	<p>This indicator shows the total amount of sales your reps expect to bring in during the selected date range(s).</p>

KPI	Description
	The forecast amount shown is the sum of the forecast overrides for reps whose supervisors have not entered forecast overrides. Click this KPI's periods or totals to open the Billings Forecast vs. Quota Report .
Forecast Override (Alt. Sales)	This indicator shows the total sales forecast for the selected date range(s), based on the ASA override forecast amounts (ASA). The override forecast reflects the ASA amount that sales reps predict they will earn for the period. Sales managers can enter forecast override amounts to account for deals that have not yet been entered as transactions, adjusting the forecast amounts of sales reps based on reps' previous success at predicting their sales. Click this KPI's periods or totals to open the Alt. Sales Forecast vs. Quota Report .
Gross New Leads	This indicator shows the total number of lead records created during the selected date range(s). Click this KPI's periods or totals to open the Gross Lead Source Analysis Detail Report . This report differs from the Lead Source Analysis Detail Report because it includes all leads, rather than those in a lead statuses marked to be included in lead reports within the date range of the report.
Hosted Page Hits	This indicator shows the number of pages your hosted website has displayed during the selected date range(s). Click this KPI's periods or totals to open the Hosted Page Hits Report .
Income	This indicator shows the total credits to income, other income, and expense accounts during the selected period(s). Click this KPI's periods or totals to open the Income Statement Report .
Inventory	This indicator shows the balance of the Inventory asset account and any Other Current Asset account for which you checked the Inventory box on the account record, for the selected date range(s). Click this KPI's periods or totals to open the Inventory Valuation Report .
Long Term Liabilities	This indicator shows the total dollar value of long term liabilities, meaning debts payable over more than one year, for the selected period(s). Click this KPI's periods or totals to open the Trial Balance Report .
My Utilization	This indicator displays a user's utilization.
Net Cash Flow	This indicator shows the overall change in cash position during the selected period(s). Click this KPI's periods or totals to open the Cash Flow Statement Report .
	 Important: If your Cash Flow Statement has been customized, the KPI amount may differ from the amount shown on the report.
New Business	This indicator shows the total of all sales transactions during the selected period(s) for customers with first sales occurring in the period(s). For this period-based analysis, orders must be actual. Click this KPI's periods or totals to open the New Customer Sales Summary Report .
New Business (Orders Alt. Sales)	This indicator shows the dollar value of sales generated through sales orders by new customers, based on alternate sales amounts (ASA), during the selected period(s). Click this KPI's periods or totals to open the New Customer Sales Orders Summary Report .
New Business (Sales Orders)	This indicator shows the amount of sales generated through sales orders by new customers during the selected period(s). Click this KPI's periods or totals to open the New Customer Sales Orders Summary Report .
New Cases	This indicator shows the number of new cases created during the selected date range(s). Click this KPI's periods or totals to open the New Cases Snapshot report .
New Customers	This indicator shows the number of customers whose first sales transactions closed in the selected period(s). For this period-based analysis, transactions must be actual.

KPI	Description
	Click this KPI's periods or totals to open the New Customer Sales Summary Report .
New Customers (Sales Orders)	This indicator shows the number of sales orders generated by customers with first sales transactions closing in the selected period(s). Click this KPI's periods or totals to open the New Customer Sales Orders Summary Report .
New Issues	This indicator shows the total number of issues created within the selected date range(s). Click this KPI's periods or totals to open the New Issues Report .
New Leads	This indicator shows the total number of lead records created during the selected date range(s). Click this KPI's periods or totals to open the Lead Source Analysis Summary Report .
New Opportunities	This indicator shows the total number of new opportunities created during the selected date range(s). Click this KPI's periods or totals to open results of an opportunity search filtered for the selected date range.
New Visitors	This indicator shows the total number of first-time visitors your website has received during the selected date range(s). Click this KPI's periods or totals to open the New Visitor Report .
Open Cases	This indicator shows the number of open cases as of the selected date(s). Click this KPI's periods or totals to open the Open Cases Snapshot report .
Open Estimates	This indicator shows the number of estimates that were open during the selected date range(s). Open estimates have a probability between 0% and 100%, and have not expired, been voided or have not been closed by an order or actual. Click this KPI's periods or totals to open the Estimates to Close Report .
Open Issues	This indicator shows the number of issues with a base status other than Closed as of the selected date(s). Click this KPI's periods or totals to open the Open Issues Summary Report report.
Open Opportunities	This indicator shows the number of open opportunities expected to close within the selected date range(s). Open opportunities have probabilities between 0 and 100%, and have not been converted to sales. Click this KPI's periods or totals to open the Opportunities to Close Detail Report .
Open Projects	This indicator shows the current number of open projects. Click this KPI's Current link or total to open the Projects list filtered to show only open projects.
Open Prospects	This indicator shows the number of open prospects as of the selected date(s). Click this KPI's periods or totals to open the Open Prospects Snapshot report .
Open Quotes	This indicator shows the number of open quotes for the selected period. Click this KPI to see the Quotes to Close report . For more information about quotes, see the help topic Quotes .
Operating Cash Flow	This indicator shows the change in cash position, excluding financing and investment activities, during the selected period(s). Click this KPI's periods or totals to open the Cash Flow Statement Report . <div> Important: If your Cash Flow Statement has been customized, the KPI amount may differ from the amount shown on the report.</div>
Operating Expenses	This indicator shows the dollar value of operating expenses during the selected period(s). Click this KPI's periods or totals to open the Income Statement Report .
Opportunities Lost	This indicator shows the number of opportunities marked lost in the selected date range(s). Lost opportunities have probabilities of 0%. Click this KPI's periods or totals to open the Opportunities Lost Report .

KPI	Description
Opportunities Won	This indicator shows the number of opportunities that were won in the selected date range(s). This number includes opportunities converted to sales transactions and those with probabilities set to 100%. Click this KPI's periods or totals to open the Opportunities Won Report .
Orders	This indicator shows the number of approved sales orders placed in the selected date range. Click this KPI's periods or totals to open the Sales Orders by Customer Summary Report .
Other Assets	This indicator shows the total dollar value of assets other than current assets and fixed assets, for the selected period(s). Click this KPI's periods or totals to open the Trial Balance Report .
Other Current Assets	This indicator shows the total dollar value of other current assets, meaning owned assets that are expected to be converted to cash within one year, for the selected period(s). Click this KPI's periods or totals to open the Trial Balance Report .
Other Current Liabilities	This indicator shows the total dollar value of other current liabilities, meaning debts payable within one year, for the selected period(s). Click this KPI's periods or totals to open the Trial Balance Report .
Overdue Balance	(Available on the Customer Dashboard only) This indicator shows the amount of the customer's current overdue balance. Click this KPI's Current link or total to open the A/R Aging Detail Report .
Paid Commission	This indicator shows the total amount of commissions paid to employees during the selected period(s). Click this KPI's periods or totals to open the Paid Employee Commission Summary Report .
Paid Partner Commission	This indicator shows the total amount of commissions paid to partners during the selected period(s). Click this KPI's periods or totals to open the Paid Partner Commission Summary Report .
Payables	This indicator shows the total impact on A/P accounts during the selected period(s). Click this KPI's periods or totals to open the A/P Aging Summary Report .
 Note: This KPI assumes that vendor payments use the same class and department. If linked transactions use different classes and departments, the KPI may display incorrect balances.	
Payroll	This indicator shows the total earnings amount from paychecks or year-to-date adjustments within the selected period(s). Click this KPI's periods or totals to open the Payroll Summary Report .
Pipeline (Alt. Sales Projected)	This indicator shows the projected dollar value of open opportunities and open estimates, based on alternate sales amounts (ASA), expected to close within the selected date range(s). This summed value excludes the value of opportunities with estimates set to be included in the forecast. This KPI can display a comparison of two different date ranges if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab. Click this KPI's periods or totals to open the Alt. Sales Pipeline by Sales Rep Summary Report .
Pipeline (Alt. Sales Weighted)	This indicator shows the weighted dollar value of open opportunities and open estimates, based on alternate sales amounts (ASA), expected to close within the selected date range(s). The weighted value is calculated by multiplying probability by projected total. This value excludes the value of opportunities with estimates set to be included in the forecast. This KPI can display a comparison of two different date ranges if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab.

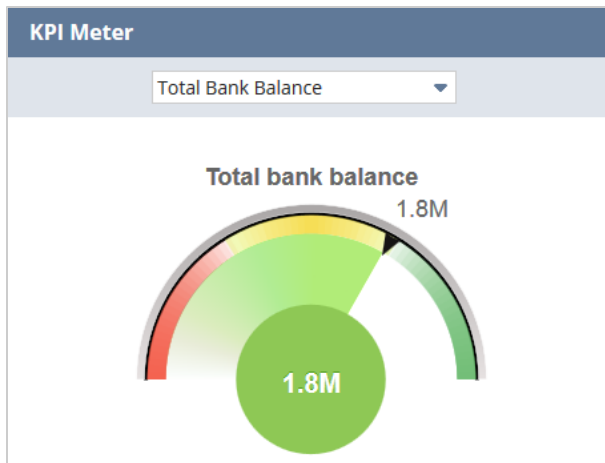
KPI	Description
	Click this KPI's periods or totals to open the Alt. Sales Pipeline by Sales Rep Summary Report .
Pipeline (Projected)	<p>This indicator shows the total value of open opportunities and open estimates expected to close within the selected date range(s). This value excludes the total of opportunities with estimates set to be included in the forecast.</p> <p>This KPI can display a comparison of two different date ranges if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab.</p> <p>Click this KPI's periods or totals to open the Pipeline by Sales Rep Summary Report.</p>
Pipeline (Weighted)	<p>This indicator shows the weighted value of open opportunities and open estimates expected to close within the selected date range(s). This value excludes the total of opportunities with estimates set to be included in the forecast. The weighted value is calculated by multiplying probability times projected total.</p> <p>This KPI can display a comparison of two different date ranges if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab.</p> <p>Click this KPI's periods or totals to open the Pipeline by Sales Rep Summary Report.</p>
Pipeline Deals	<p>This indicator shows the number of open opportunities and open estimates expected to close within the selected date range(s). This number excludes the number of opportunities with estimates set to be included in the forecast.</p> <p>This KPI can display a comparison of two different date ranges if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab.</p> <p>Click this KPI's periods or totals to open the Pipeline by Sales Rep Summary Report.</p>
Profit	<p>This indicator shows the difference between your income and expenses during the selected period(s).</p> <p>Click this KPI's periods or totals to open the Income Statement Report.</p>
Quota	<p>This indicator shows the sum of all top-level quotas to which you have access, for the selected date range(s). If an employee is assigned a personal quota and a team quota, only the team quota is included in the sum.</p> <p>Click this KPI's periods or totals to open the Billings Forecast vs. Quota Report.</p>
Quota (Alt. Sales)	<p>This indicator shows the sum of all top-level quotas to which you have access, based on alternate sales amounts (ASA), for the selected date range(s). If an employee is assigned both a personal quota and a team quota, only the team quota is included in the sum.</p> <p>Click this KPI's periods or totals to open the Alt. Sales Forecast vs. Quota Report.</p>
Quota Reps	<p>This indicator shows the number of sales reps that have been assigned quotas as of the selected date(s).</p> <p>Click this KPI's periods or totals to open the Quota Reps report.</p>
Receivables	<p>This indicator shows the total impact on A/R accounts during the selected period(s).</p> <p>Click this KPI's periods or totals to open the A/R Aging Summary Report.</p>
Revenue	<p>This indicator shows the total credits to income and expense accounts during the selected period(s).</p> <p>Click this KPI's periods or totals to open the Income Statement Report.</p>
Sales (This KPI is labeled Sales (Billings) on the Customer Dashboard.)	<p>This indicator shows total paid or billed income and reimbursed expenses for customers during the selected period(s). It excludes the following transaction types: Journal, Deposit, Credit Card, Credit Card Refund, and Check.</p> <p>Click this KPI's periods or totals to open the Sales by Customer Summary Report.</p>
Sales (Cash Basis)	<p>This indicator shows total paid income and reimbursed expenses for customers during the selected period(s). It excludes the following transaction types: Journal, Deposit, Credit Card, Credit Card Refund, and Check. Income is only counted in this KPI if it has been paid. Sales are included based on the date of the payment.</p>

KPI	Description
	Click this KPI's periods or totals to open the Sales by Customer Summary – Cash Basis report. See also Setting Up Cash Basis Reporting .
Sales (Orders)	This indicator shows the dollar value of sales generated through approved sales orders during the selected date range(s). Click this KPI's periods or totals to open the Sales Orders by Customer Summary Report .
Sales (Orders Alt. Sales)	This indicator shows the dollar value of sales generated through approved sales orders, based on alternate sales amounts (ASA), during the selected date range(s). Click this KPI's periods or totals to open the Sales Orders by Customer Summary Report .
Total Backlog (Projects)	This indicator shows the total number of budgeted hours left to complete all open projects. Click this KPI's Current link or total to open the Current Backlog By Resource Report report.
Total Open Estimates	This indicator shows the number of estimates that were open as of the selected date(s). Open estimates have a probability between 0% and 100%, and have not been closed by an order or actual. Click this KPI's periods or totals to open the Total Open Estimates Report .
Total Open Opportunities	This indicator shows the number of opportunities that were open as of the selected date(s). Open opportunities have a probability between 0% and 100%, and have not been closed by an order or actual. Click this KPI's periods or totals to open the Total Open Opportunities Detail Report .
Total Open Quotes	This indicator shows the total number of open quotes for the selected period. Click this KPI to see the Total Quotes report. For more information about quotes, see the help topic Quotes .
Total Orders (Count)	This indicator shows the number of sales orders placed during the selected date range(s). Click this KPI's periods or totals to open the Sales Order Register Report .
Total Pipeline (Alt. Sales Projected)	This indicator shows the total projected dollar value of open opportunities and open estimates based on alternate sales amounts (ASA), that are open as of today, or as of the other dates selected. This KPI can display a comparison for two different dates if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab. Click this KPI's periods or totals to open the Alt. Sales Total Pipeline by Sales Rep Summary Report .
Total Pipeline (Alt. Sales Weighted)	This indicator shows the total weighted dollar value of open opportunities and open estimates, based on alternate sales amounts (ASA), that are open as of today, or as of the other dates selected. The weighted value is calculated by multiplying probability by projected total. This KPI can display a comparison for two different dates if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab. Click this KPI's periods or totals to open the Alt. Sales Total Pipeline by Sales Rep Summary Report .
Total Pipeline (Projected)	This indicator shows the projected value of open opportunities and estimates, as of today, or as of the other dates selected. This value excludes the total of opportunities with estimates set to be included in the forecast. This KPI can display a comparison for two different dates if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab. Click this KPI's periods or totals to open the Total Pipeline by Sales Rep Summary Report .
Total Pipeline (Weighted)	This indicator shows the weighted value of open opportunities and estimates, as of today, or as of the other dates selected. This value excludes the total of opportunities with

KPI	Description
	estimates set to be included in the forecast. The weighted value is calculated by multiplying probability times projected total. This KPI can display a comparison for two different dates if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab. Click this KPI's periods or totals to open the Total Pipeline by Sales Rep Summary Report .
Total Pipeline Deals	This indicator shows the total number of opportunities and estimates that are presently open, as of today, or as of the other dates selected. This KPI can display a comparison for two different dates if you have enabled the Historical Metrics feature. The check box for this feature is available under Setup > Company > Setup Tasks > Enable Features, in the Sales section of the CRM subtab. Click this KPI's periods or totals to open the Total Pipeline by Sales Rep Summary Report .
Total Sales (Orders)	This indicator shows the total dollar value of sales, through both approved and unapproved sales orders, during the selected date range(s). Click this KPI's periods or totals to open the Sales Order Register Report .
Unbilled Orders	(Available on the Customer Dashboard only) This indicator shows the total amount of the customer's orders that have been placed but not billed for the selected period(s). Click this KPI's periods or totals to open the Open Sales Orders Report .
Unique Visitors	This indicator shows the number of visitors your website has received during the selected date range(s). Click this KPI's periods or totals to open the Visitor Activity Summary Report .
Web Orders	This indicator shows a count of web orders placed during the selected date range(s). Click this KPI's periods or totals to open the Item Orders Report .
Web Revenue	This indicator shows the total credits to income and expense accounts from Web orders during the selected date range(s).
Web Site Hits	This indicator shows the number of pages your website has displayed during the selected date range(s). Click this KPI's periods or totals to open the Page Hits Report .

KPI Meters

You can add up to three KPI Meter portlets to a dashboard. Each meter visually represents data for one KPI that is displayed in the dashboard's Key Performance Indicators portlet.



Choices of KPIs for a meter are limited to the KPIs displayed in the dashboard's Key Performance Indicators portlet, plus the following: Actual vs. Forecast, Actual vs. Quota, Forecast vs. Quota, and Forecast vs. Quota (Alt. Sales).

Each KPI meter can show KPI data for one date range, a comparison of KPI data for two different date ranges, or a flagged threshold value. By default, the meter shows comparisons or thresholds if they are set up for the KPI in the Key Performance Indicators portlet. Whenever you change these options in either the KPI meter or the Key Performance Indicators portlet, they are also changed in the other portlet so that the two portlets remain in sync. You can, however, set up different options for the KPI meter, for instance not showing a comparison in the KPI meter portlet but showing one in the Key Performance Indicators portlet.

To set up a KPI Meter portlet:

1. Ensure that the KPI you want to display in the KPI meter is listed in the Key Performance Indicators portlet. If it is not listed, click **Set Up** in the portlet menu. In the Set Up Key Performance Indicators popup, click **Add Standard KPIs** or **Add Custom KPIs**, select the KPI, and click **Done**. Click **Save** to add the selected KPI to the portlet.
2. To add a KPI Meter portlet to a page, click the **Personalize Dashboard** link. In the Add Content Panel, click the KPI Meter icon or drag it onto the dashboard.
3. By default, the KPI Meter portlet displays a graph for the KPI that is listed first in the Key Performance Indicators portlet. To change the KPI that the meter represents, select another KPI from the portlet's dropdown list.

If you select **Actual vs. Forecast**, **Actual vs. Quota**, **Forecast vs. Quota**, or **Forecast vs. Quota (Alt. Sales)**, the following message may appear: "No data available for this portlet."

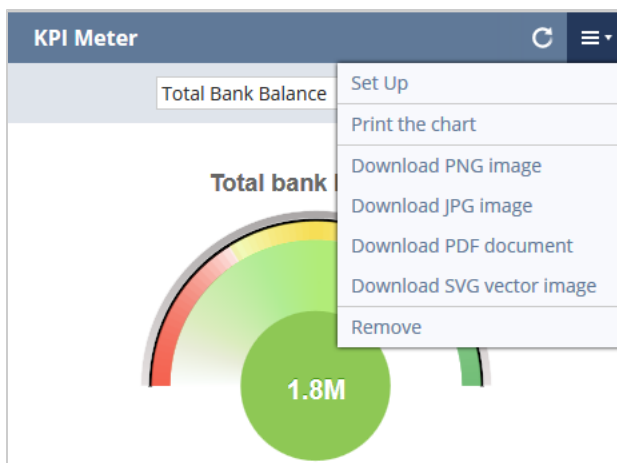
This message indicates that you need to add one or both of the underlying KPIs to the Key Performance Indicators portlet to display the KPI meter.

To display this meter...	Add these KPIs to Key Performance Indicators Portlet:
Actual vs. Forecast	Sales, Forecast (Alt. Sales)
Actual vs. Quota	Sales, Quota
Forecast vs. Quota	Forecast (Alt. Sales), Quota
Forecast vs. Quota (Alt. Sales)	Forecast (Alt. Sales), Quota (Alt. Sales)

To add these KPIs to the Key Performance Indicators portlet, click the **Set Up** link in the portlet menu, click the **Add Standard KPIs** button, select each KPI from the box, click **Done**, and click **Save**. For more information, see [Setting Up the Key Performance Indicators Portlet](#).

4. To change the meter's settings for showing comparison or threshold highlighting, click the **Set Up** link in the portlet menu, make changes in the Set Up KPI Meter popup, and click **Save**.

You can also print the KPI Meter or download it to a file, using the options in the portlet menu.



You can change the position of the KPI Meter portlet on your dashboard by dragging it to a different location. For more information, see [Arranging Dashboard Portlets](#).

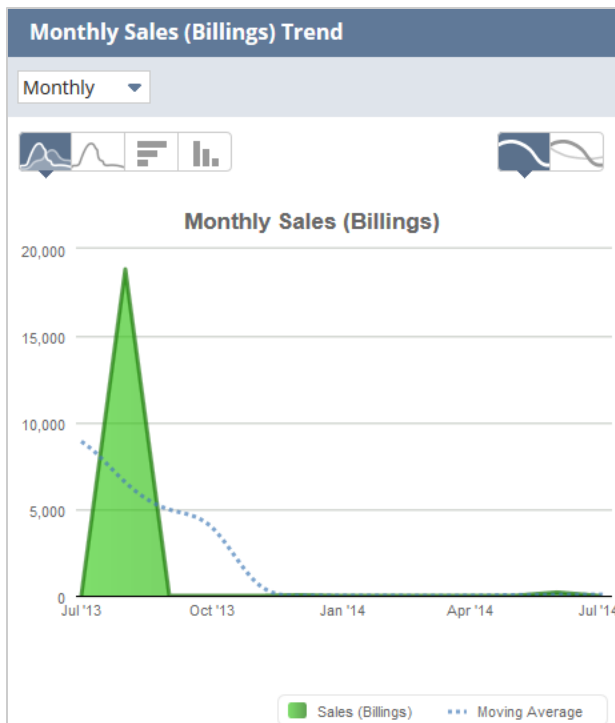
Important: If you have selected a custom KPI to display in a KPI meter and its results do not look correct, the saved search on which the custom KPI is based may not satisfy related requirements. The saved search definition must:

- Not include any date fields defined as filters on the Criteria subtab
- Have only one field with a summary type (such as group, sum, or count) defined on the Results subtab.
- Have a date field defined as an available filter on the Available Filters subtab.

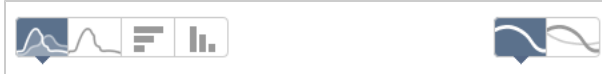
For more information, see [Custom KPIs](#).

Trend Graphs

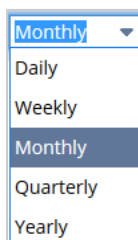
The dashboard trend graphs can be used to illustrate the differences in KPI data values over time.



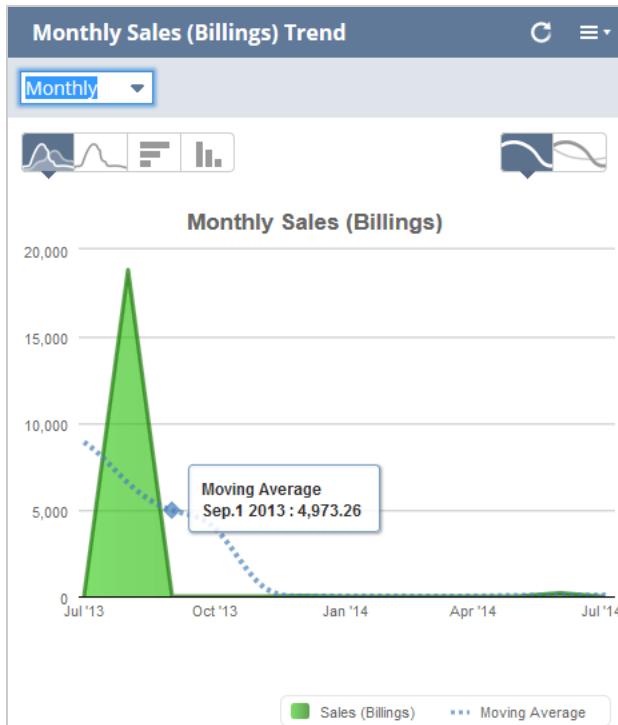
Trend graphs offer choices to display data in Area, Line, Bar, or Column charts, and to use continuous or side-by-side comparisons. You can click thumbnails to shift among these choices.



You can also use the dropdown list to set the time period for trend graph data.



When you roll over a point in a trend graph, its value displays:



Trend graphs are available in two display modes: popup trend graphs and trend graph portlets. You can set layout options for both types of trend graphs. Both also offer options to print charts, to download charts to PNG, JPG, PDF, and SVG files, and to export chart data to CSV files.

For more information, see the following topics:

- [Displaying Popup Trend Graphs](#)
- [Displaying Trend Graph Portlets](#)
- [Displaying Custom KPI Results in Trend Graphs](#)

Displaying Popup Trend Graphs

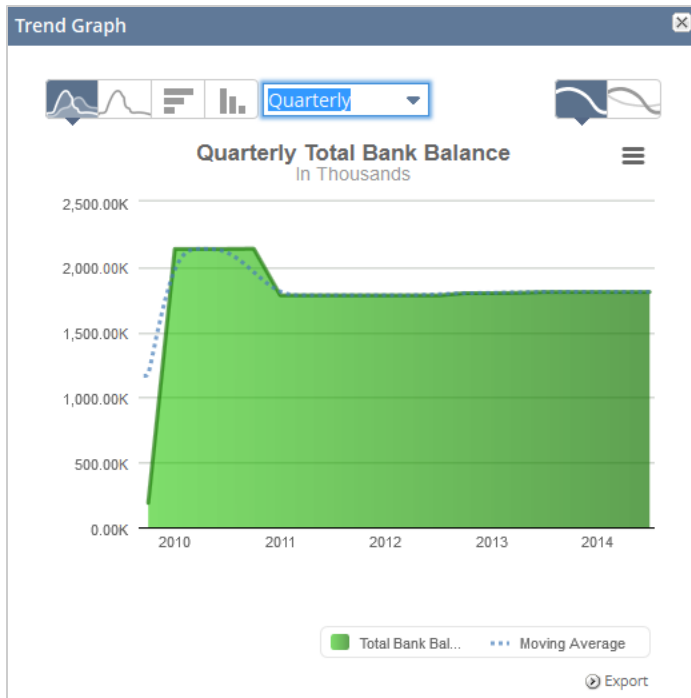
Popup trend graphs are available from clickable Trend Graph icons in the Key Performance Indicators portlet and the KPI Scorecard portlet.

Key Performance Indicators				
INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Total Bank Balance	This Period vs. Last Period	\$1,807,371	\$1,807,371	0.0%
Cases Escalated	This Month vs. Same Month Last FQtr to Date	0	0	0.0%
Closed Issues	This Week vs. Last Week	0	0	0.0%
COGS	This Period vs. Last Period	\$0	\$0	0.0%
Credit Card Balance	This Period vs. Last Period	\$4,225	\$4,225	0.0%

- To enable this icon for a KPI in the Key Performance Indicators portlet, you need to set up a time-based comparison for it in the Set Up Key Performance Indicators popup. For information, see [Setting Up KPI Comparisons](#).
- In KPI Scorecard portlets, trend graph icons are usually enabled when the portlet is set to display KPIs on the left. However, when the portlet is set to display date ranges on the left, you may need to

click Set Up in the KPI Scorecard portlet to open the KPI Scorecard Setup popup and select the Show Trend Graph Icon check box. For information, see [Adding a KPI Scorecard Portlet to a Dashboard](#).

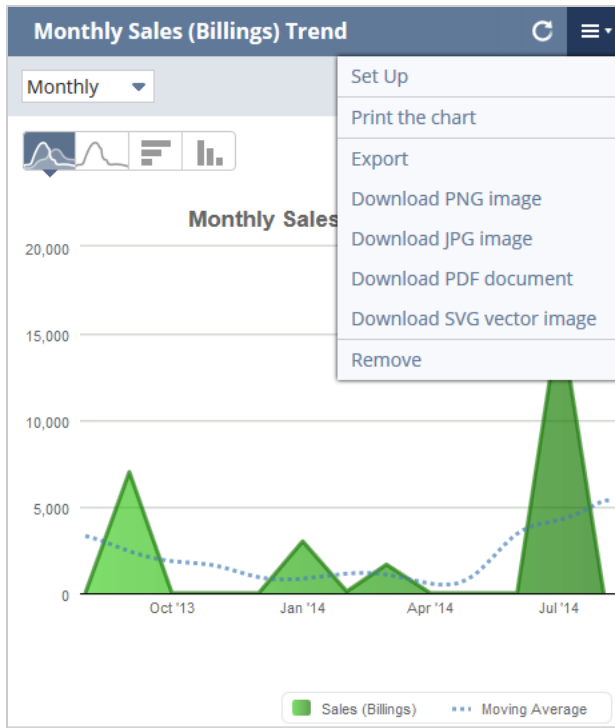
When you click a Trend Graph icon, a popup trend graph displays data.



- You can set display options for all popup trend graphs in the Popup Trend Graphs subtab of the Set Up window of the Key Performance Indicators portlet. For more information, see [Setting Up Popup Trend Graphs](#).
- Each popup trend graph includes buttons you can click to print the trend graph chart, or to download it to a PNG, JPG, PDF, or SVG file, and an Export link you can click to export chart data to a CSV file.

Displaying Trend Graph Portlets

You can add up to five trend graph portlets to any standard or custom dashboard, by clicking Trend Graphs icons in the Personalize Dashboard panel or dragging them onto the dashboard. Each trend graph portlet includes a Set Up link that you can click to set display options for that trend graph only. For more information, see [Setting Up Trend Graph Portlets](#). Additional menu options enable you to print the trend graph chart, to download it to a PNG, JPG, PDF, or SVG file, and to export chart data to a CSV file.



Displaying Custom KPI Results in Trend Graphs

- A custom KPI can be displayed in a trend graph portlet if the saved search on which this custom KPI is based:
 - Does not include any date fields defined as filters on the Criteria subtab
 - Has exactly one field with a summary type (such as group, sum, or count) defined on the Results subtab. The rest of the fields on the Results subtab should not use any summary types.
 - Has a date field defined as an available filter on the Available Filters subtab.
- Custom KPIs can only be displayed in trend graph portlets on pages that include a Key Performance Indicators portlet.
- When a KPI is set to Custom KPI #1-#10, the Default Trend Type dropdown list displays saved searches, which meet criteria used in trend graphs.

For more information, see [Custom KPIs](#).

Setting Up Popup Trend Graphs

You set display options for popup trend graphs on the Popup Trend Graphs subtab of the Set Up Key Performance Indicators popup. These options apply to all popup trend graphs for both the Key Performance Indicators portlet and the KPI Scorecard portlet.

You also can reset the time interval for each graph's x-axis directly in each trend graph popup.

For more information, see the following topics:

- [Making Popup Trend Graphs Available](#)
- [Setting Up Popup Trend Graph Display Options](#)

Making Popup Trend Graphs Available

- To make popup trend graphs available from the Key Performance Indicators portlet, ensure that the portlet displays the KPI for which you want to view a popup trend graph, and that you have set up a date range comparison for the KPI. For information, see [Setting Up the Key Performance Indicators Portlet](#).
- Popup trend graphs are available for KPIs in a KPI Scorecard portlet that is set to display KPIs on the left. If your KPI Scorecard portlet is set to display date ranges on the left, you need to click the Set Up link in the portlet's menu and select the Show Trend Graph Icon box. For information, see [Adding a KPI Scorecard Portlet to a Dashboard](#).

Setting Up Popup Trend Graph Display Options

You can define display options for popup trend graphs on the Popup Trend Graphs tab of the Set Up Key Performance Indicators window that is displayed when you click the Key Performance Indicators portlet's Set Up link.

Set Up Key Performance Indicators

Save Cancel Reset

Key Performance Indicators **Popup Trend Graphs**

Data Text

DEFAULT CHART TYPE
Area

DEFAULT TIME INCREMENT
Yearly

PERIOD TO CALCULATE MOVING AVERAGE *
2

☒ SHOW MOVING AVERAGE
☒ SHOW LAST DATA POINT ON POP-UP TREND GRAPHS
☐ INCLUDE ZERO ON Y-AXIS

Visual Builder

CHART THEMES
Global Theme

CUSTOM SERIES COLOR
[Empty Text Box]

CHART BACKGROUND
Global Background

Save Cancel Reset

Note that the options you set here apply to ALL popup trend graphs available from both the Key Performance Indicators portlet and the KPI Scorecard portlet.

To set up a popup trend graph:

1. Click **Set Up** in the Key Performance Indicators portlet to open the Set Up Key Performance Indicators popup.
2. Click the **Popup Trend Graphs** subtab. You can set the following options.

1. Select from the **Default Chart Type** list to set the default chart used for all popup trend graphs.
 - Chart type options are **Area**, **Line**, **Bar**, and **Column**.
 - You can click thumbnails in an individual trend graph to change its chart type from the default set here.



In addition to the set of four chart type thumbnails on the left, each popup trend graph includes two thumbnails that you can click to choose either a continuous or side-by-side comparison of data in the trend graph.

2. Select from the **Default Time Increment** list to set the default time interval used for all popup trend graph comparisons.
 - Choices usually include **Daily**, **Weekly**, **Monthly**, **Quarterly**, and **Yearly**.
 - You can change this default in an individual trend graph by selecting from its time interval dropdown list.
3. Review the following options, and check or clear boxes as desired.
 - If the **Show Moving Average** option is enabled, all popup trend graphs display a dotted line representing the rolling average of KPI data values. This option is enabled by default.
 - If the **Show Last Data Point on Pop-Up Trend Graphs** option is enabled, all popup trend graphs display the most recent KPI data point. Because the last point may not provide complete data, you may want to exclude this point from the graph to avoid a misleading display. This option is enabled by default.
 - If the **Include Zero on Y-Axis** option is enabled, the first y-axis value for all popup trend graphs is set to zero, rather than to the initial KPI data point. This option is disabled by default, to avoid showing misleadingly dramatic increases in initial trend graph data.
4. Enter a number in the **Period to Calculate Moving Average** field.
 - This number indicates the number of data points to use in calculating the slope of the moving average line in popup trend graphs.
 - Note that the lower the number here, the greater the slope of the line.
 - You can enter the number that represents the window of data you want to average based on the time increment selected. For example, if you select **Monthly** and enter 3 as your window, each data point on your Y-axis represents a 3 month average.
5. Select from the **Chart Themes** list to set a look and feel for popup trend graph data:
 - **Global Theme** – uses the chart theme selected at Home > Set Preferences.
 - **Basic** – provides limited color contrast.
 - **Colorful** – provides more color contrast.
 - **Match Color Theme - Bold** – harmonizes with your choices in the Colors section of the Set Preferences page using bolder shades.
 - **Match Color Theme - Light** – harmonizes with your choices in the Colors section of the Set Preferences page using lighter shades.
6. Select from the **Chart Background** list to set the display behind popup trend graph data:
 - **Global Background** – uses the chart background set at Home > Set Preferences.

- **Lines** – provides lines that demarcate different levels along the Y-axis.
 - **Bands** – provides bands that demarcate different levels along the Y-axis.
 - **Grid** – provides a grid all throughout the Y-axis.
7. You can also specify a custom color for the trend graph line by typing its hexadecimal code in the **Custom Series Color** field or by clicking the palette button that appears when you hover over this field.

3. Click **Save**.

Note: A custom KPI will not display properly in a popup trend graph if the saved search on which it is based does not meet related requirements. For information, see [Displaying Custom KPI Results in Trend Graphs](#).

Setting Up Trend Graph Portlets

You can add up to five trend graph portlets to any standard or custom page, by clicking or dragging and dropping KPIs in the Trend Graphs folder of the page's Add Content panel. Each trend graph portlet includes a Set Up link that you can click to set display options for that trend graph only.

Trend Graph
✕

Save
Cancel
Reset

DEFAULT CHART TYPE

Area
▼

KPI

Sales
▼

TREND TYPE

Yearly
▼

☒ SHOW MOVING AVERAGE

PERIOD TO CALCULATE MOVING AVERAGE *

2

☒ SHOW LAST DATA POINT

☐ INCLUDE ZERO ON Y-AXIS

CHART THEME

Global Theme
▼

CUSTOM SERIES COLOR

BACKGROUND TYPE

Global Background
▼

Save
Cancel
Reset

To set up a trend graph portlet:

1. Click the **Personalize** link in the upper right corner of a page or in the Settings portlet.
2. On the **Trend Graphs** subtab, click a Trend Graph icon or drag it onto the dashboard.
3. Click the **Set Up** link in the trend graph portlet's menu.
4. Select a standard or a custom KPI from the **KPI** dropdown list.



Important: Custom KPIs are only available in trend graph portlets on pages that include a Key Performance Indicators portlet.

5. You can also edit the following settings:
 1. Select from the **Default Chart Type** list to set the default chart type displayed in this portlet.
 - Chart type options are **Area**, **Line**, **Bar**, and **Column**.
 - You can click thumbnails in the portlet itself to dynamically change its chart type from the default set here.



In addition to the set of four chart type thumbnails on the left, each trend graph portlet includes two thumbnails that you can click to choose either a continuous or side-by-side comparison of data in the trend graph.

2. If you selected a custom KPI, select a saved search from the **Default Trend Type** dropdown list. If a saved search is not available, or returns an error when you select it, its definition may not meet requirements for trend graph display. For information, see [Displaying Custom KPI Results in Trend Graphs](#)
3. Select from the **Trend Type** list to indicate whether the graph's x-axis time scale should be **daily**, **weekly**, **monthly**, **quarterly**, or **yearly**. You also can set this option by selecting from a dropdown list in the portlet.
4. Check the **Show Moving Average** box to display a dotted line in the trend graph, representing the rolling average of KPI data values. This option is enabled by default.
5. In the **Period to calculate moving average** field, enter the number that represents the window of data you want to average based on the date range selected in the **Trend Type** field. For example, if you select monthly and enter 3 as your window, each data point on your y-axis will represent a 3 month average.
6. Check the **Show Last Data Point** box to display the most recent KPI data point in the trend graph. Because the last point may not provide complete data, you may want to exclude this point from the graph to avoid a misleading display. This option is enabled by default.
7. Check the **Include Zero on Y-Axis** box to set the first y-axis value for the trend graph to zero, rather than to the initial KPI data point. This option is disabled by default, to avoid showing misleadingly dramatic increases in initial trend graph data.
8. Select from the **Chart Theme** dropdown list to set a look and feel for chart data:
 - **Global Theme** – uses the chart theme set at Home > Set Preferences (the default). See the help topic [Setting Preferences for Appearance](#).
 - **Basic** – provides limited color contrast.
 - **Colorful** – provides more color contrast.

- **Match Color Theme - Bold** – harmonizes with your choices in the Colors section of the Set Preferences page using bolder shades.
 - **Match Color Theme - Light** – harmonizes with your choices in the Colors section of the Set Preferences page using lighter shades.
9. In the **Custom Series Color** field, enter a hexadecimal value for a custom color you want to use for the chart. (Note that this option is provided for backwards compatibility with custom chart colors defined prior to the introduction of chart themes in Version 2012 Release 2.)
 10. Select from the **Background Type** dropdown list to set the display behind chart data:
 - **Global Background** – uses the background type set at Home > Set Preferences (the default).
 - **Lines** – provides lines that demarcate different levels along the Y-axis.
 - **Bands** – provides bands that demarcate different levels along the Y-axis.
 - **Grid** – provides a grid all throughout the Y-axis.
6. When you are done, click **Save**. The portlet refreshes itself.

Note that each trend graph portlet includes menu options to print the chart, to download it to a PNG, JPG, PDF, or SVG file, and to export its data to a CSV file.

Custom KPIs

NetSuite provides over 75 standard KPIs that you can display in a dashboard's Key Performance Indicators portlet, or use for calculations in a KPI scorecard. These standard KPIs provide quick summaries of standard NetSuite report data and enable you to drill down into the full reports for more detail.

You may have other important data that you would like to display as a KPI on your dashboard, that is not available from standard reports. In this case, you can find a preexisting saved search that compiles this data or create a new saved search for this purpose.

For information, see:

- [Selecting an Existing Search to be a Custom KPI](#)
- [Creating a New Search to be a Custom KPI](#)

After you have identified an appropriate saved search, you can define it as a data source for a custom KPI.

- You can display up to ten custom KPIs in each Key Performance Indicators portlet. When a custom KPI is displayed in the portlet, you can click it to drill down to detailed results from its saved search, and click a Trend Graph icon to display its data in a popup trend graph. For information, see [Adding a Custom KPI to the Key Performance Indicators Portlet](#).
- You can define up to ten custom KPIs to be used in each KPI scorecard portlet's calculations. For information, see [Using a Custom KPI in a KPI Scorecard](#).
- Custom KPIs displayed in the Key Performance Indicators portlet are also available for display in KPI Meter portlets. You can display up to three KPI meters on a dashboard. For information, see [KPI Meters](#).
- Custom KPI data can also be displayed in Trend Graph portlets. You can add up to five Trend Graph portlets. For information, see [Setting Up Trend Graph Portlets](#).
- Custom KPI definitions for individual KPI scorecards, the Key Performance Indicators portlet, and Trend Graph portlets are all independent of each other.


For a saved search to be used as a custom KPI that displays results for multiple date ranges in the Key Performance Indicators portlet, a KPI scorecard, a trend graph, or a KPI meter, the search definition must:

- Not include any date fields defined as filters on the Criteria subtab. See the help topic [Defining Standard Search Filters](#).
- Have exactly one field with a summary type (such as count, group, or sum) defined on the Results subtab. The rest of the fields on the Results subtab should not use any summary types. See the help topic [Defining Summary Types to Roll Up Search Results](#).
- Have a date field defined as an available filter on the Available Filters subtab. See the help topic [Selecting Available Filters for Saved Searches](#).

Selecting an Existing Search to be a Custom KPI

To select an existing saved search to be used as a custom KPI:

1. Choose Reports > Saved Searches > All Saved Searches.
2. In the Saved Searches list, click **Edit** next to the search you want to use as a custom KPI. You need to ensure that the search has been defined correctly to display KPI data in the manner you want.
3. On the **Criteria** subtab, make sure that no date filters are used as search criteria.

 **Note:** KPIs cannot enforce summary criteria filters because KPI calculations do not include groupings. If a saved search used as a custom KPI includes any summary criteria filters, the result for the KPI may differ from results when the search is run.

4. On the **Results** subtab, make sure you have only one field that uses a summary type.
 - If you want to display a count of the number of search results for a KPI, select a number or ID field (such as **Number**) and set a **Count** summary type for this field.
 - If you want to display summary data such as sum (total), average, minimum, or maximum, select a field and set the appropriate summary type for it.
5. On the **Available Filters** subtab, add a date field to be able to compare saved search results over different date ranges in a Key Performance Indicators portlet, a trend graph, a KPI meter, or a KPI scorecard.
 - If the type of search you have selected does not offer a date column as a filter, you may be able to use a different type of search, for example, a transaction search.
 - If you want to use a saved search as a custom KPI in a scorecard and you have enabled the **Use Periods** option for a scorecard, only saved searches with a **Period** filter defined as an **Available Filter** can be defined as custom KPIs for the scorecard.
6. Edit the search to meet your requirements and resave it.
 - If you do not have the ability to edit and resave this search, you can ask the owner to edit it, or you can create another, similar search yourself.
 - Choose **Save & Run** to verify the search results are what you expect.
7. Note the title of the search. It will appear in the custom KPI lists in the Set Up Key Performance Indicators popup and the KPI scorecard.
8. Now you can use the search as a custom KPI and add it to the Key Performance Indicators portlet, add it to a KPI scorecard, or display it in a trend graph portlet. See [Adding a Custom KPI to the Key Performance Indicators Portlet](#), or [Using a Custom KPI in a KPI Scorecard](#).

For more information about editing saved searches, see the help topic [Saved Searches](#).

Creating a New Search to be a Custom KPI

To create a new saved search to be used as a custom KPI:

1. Choose Reports > Saved Searches > All Saved Searches > New.
2. In the New Saved Search list, click a search type.
3. On the Saved Search form, enter a title for the search. (This title will appear in the custom KPI dropdown lists in the Set Up Key Performance Indicators popup and the KPI scorecard.)
4. On the **Criteria** subtab, define the filters that will limit the search data, making sure you don't include date filters as search criteria.

Note: KPIs cannot enforce summary criteria filters because KPI calculations do not include groupings. If a saved search used as a custom KPI includes any summary criteria filters, the result for the KPI may differ from results when the search is run.

5. On the **Results** subtab, define which fields you want to be returned in the saved search results. Make sure you have exactly one field that uses a summary type.
 - If you want to display a count of the number of search results for a KPI, select a number or ID field (such as **Number**) and set a **Count** summary type for this field.
 - If you want to display summary data such as sum (total), average, minimum, or maximum, select a field and set the appropriate summary type for it.
6. On the **Available Filters** subtab, add a date field to be able to compare saved search results over different date ranges in a Key Performance Indicators portlet, a trend graph, a KPI meter, or a KPI scorecard.
 - If the type of search you have selected does not offer a date column as a filter, you may be able to use a different type of search, for example, a transaction search.
 - If you want to use a saved search as a custom KPI in a scorecard and you have enabled the **Use Periods** option for a scorecard, only saved searches with a **Period** filter defined as an **Available Filter** can be defined as custom KPIs for the scorecard.
7. When you are done defining the search, click **Save**. (You can choose **Save & Run** to verify the search results are what you expect.)

Now you can use the search as a custom KPI and add it to the Key Performance Indicators portlet, add it to a KPI scorecard, or display it in a trend graph portlet. See [Adding a Custom KPI to the Key Performance Indicators Portlet](#), or [Using a Custom KPI in a KPI Scorecard](#).

For more information about creating saved searches, see the help topic [Saved Searches](#).

Adding a Custom KPI to the Key Performance Indicators Portlet

Custom KPIs are based on saved searches, so you need to create or select an appropriate search before you add a custom KPI to the portlet. For information, see [Creating a New Search to be a Custom KPI](#) or [Selecting an Existing Search to be a Custom KPI](#).

To add a custom KPI to the Key Performance Indicators Portlet:

1. Click **Set Up** in your Key Performance Indicators portlet.
2. In the Set Up Key Performance Indicators popup, click **Add Custom KPIs** to open the Choose Custom Key Performance Indicators popup window.


- Click a saved search in the right list to move it to the left list, which indicates that it should be displayed as a custom KPI.
 - Click **Done** after you have finished selecting KPIs for display.
 - You can choose up to 10 custom KPIs.
 - Custom KPIs are listed with “c” icons. Click an icon for a brief general description of custom KPIs.
3. For each selected KPI, in the **Range** list, select the date or period range for which data should be included.
 4. For each selected KPI, in the **Compare** column, check the box if you want to compare results from the time period defined in the **Range** list with results from another period defined in the **Compare Range** list.
 5. For each selected KPI, in the **Compare Range** list, if you checked the **Compare** box, select the date or period range for which data should be compared with data from the first range. If you did not check the **Compare** box, you do not need to make a selection here.
 6. For each selected KPI, in the **Highlight If** list, select **greater than** or **less than** if you want to highlight data that exceeds or falls short of a defined threshold. If you do not want highlighting for this KPI, leave this column blank.
 7. If you selected an option in the **Highlight If** column, enter the threshold value in the **Threshold** column.

If you want the change to be highlighted in the portlet’s headline when the specified threshold value is reached, select the check box in the **Headline** column.
 8. Click **Save**.

Using a Custom KPI in a KPI Scorecard

You can use custom KPIs for comparisons in KPI scorecards as well as include them in KPI scorecard formulas.

To learn how to create and configure KPI scorecards, see [KPI Scorecards Overview](#).

 **Note:** Custom KPIs are based on saved searches, so you need to create or select an appropriate search before you add a custom KPI to a scorecard. For information, see [Creating a New Search to be a Custom KPI](#) or [Selecting an Existing Search to be a Custom KPI](#).

To add a custom KPI to a KPI scorecard:

1. Open the KPI scorecard where you want to add a custom KPI.
 - To edit an existing KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards and click Edit next to the KPI scorecard you want to edit.
 - To create a new KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards > New. For more information, see [Creating a KPI Scorecard](#), and [Entering Basic Scorecard Information](#).
2. On the **Content** tab, select one of the custom KPIs (**Custom KPI #1–Custom KPI #10**) from the **KPIs** list.
3. On the **Custom** subtab, find the custom KPI number you added to the **KPIs** list (**Custom KPI #1** through **Custom KPI #10**) and specify the saved search to be used as this custom KPI.
4. If you want to add a custom KPI ID to a formula expression, select a formula from the **KPIs** list, click the **Set Formula** icon in the **Formula** column, and select one of the custom KPIs you defined on the **Custom** subtab.

To learn how to define other formula settings, see [Defining KPI Scorecard Formulas](#).

5. Define other settings for the KPI comparison. For information, see [Defining KPI Scorecard Comparisons](#).

KPI Scorecards Overview

The KPI Scorecard portlet displays your choice of a performance scorecard. KPI scorecards can provide complex comparisons among multiple KPIs over multiple date ranges or accounting periods. Scorecards also can include Excel-like formulas with KPIs and functions in their expressions. Scorecards offer many choices for calculation and display of KPI data. To get an understanding of what you can do with KPI scorecards, see the following:

- [Scorecard Data Calculation and Comparison Options](#)
- [Scorecard Data Display Options](#)

To get started using KPI scorecards, see the following:

- [Enabling the KPI Scorecards Feature](#)
- [Adding a KPI Scorecard Portlet to a Dashboard](#)
- [Creating a KPI Scorecard](#)

Scorecard Data Calculation and Comparison Options

- Comparison of KPI results for a greater variety of date range types
- Comparison of KPI results for a progression of date ranges
- Comparison of multiple KPIs' results
- Different types of comparative calculations including:
 - Sums: $A+B$
 - Variances in absolute or percent terms: $A-B$ or $100(B-A)/A$
 - Ratios in absolute or percentage terms: (B/A) or $100*B/A$
- Inversion of date ranges in comparisons
- Excel-like formulas with the following features:
 - Formula results that can be expressed as:
 - Dollar amounts
 - Percentages
 - Numeric amounts
 - Formula expressions that can include:
 - Multiple KPIs
 - Common functions
 - Ability to define hidden formulas with results to be used by other formulas

Scorecard Data Display Options

- Ability to orient KPIs horizontally or vertically
- Ability to define custom labels in place of KPI names
- Optional popup trend graphs
- Ability to limit displayed data to your own or your team's results.

Note: NetSuite includes a prebuilt Financial Ratios scorecard that is available to users with permission to see the Trial Balance report. For information about this scorecard, see [Financial Ratios Scorecard](#).

Enabling the KPI Scorecards Feature

The KPI Scorecards feature must be enabled before you can create a KPI scorecard or add a KPI Scorecard portlet to a dashboard.

To enable the KPI Scorecards feature:

1. Go to Setup > Company > Enable Features.
2. On the **Analytics** subtab, check the **KPI Scorecards** box, and click **Save**.

Note: If you do not see the **Enable Features** option in your **Setup** tab's menu, you do not have this permission. You need to ask an administrator or someone with the Enable Features permission to enable the KPI Scorecards feature.

When the KPI Scorecards feature is enabled, you can:

- Create your own KPI scorecard (if you have the KPI Scorecards permission). See [Creating a KPI Scorecard](#).
- Add a KPI scorecard portlet to display an existing KPI scorecard. See [Adding a KPI Scorecard Portlet to a Dashboard](#).

Adding a KPI Scorecard Portlet to a Dashboard

You can add a KPI Scorecard portlet to a dashboard in the same manner that you add other portlets, but this portlet is not available unless the KPI Scorecards feature has been enabled.

After you have added a KPI Scorecard portlet, you can click **Set Up** in the portlet, then select a KPI scorecard and define display options.

To add a KPI Scorecard portlet to a dashboard:

1. Click the **Personalize** link in the upper right corner of your dashboard. You can also use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Standard Content** tab of the **Personalize Dashboard** palette, click the **KPI Scorecard** item or drag it onto the dashboard.

If the list does not include KPI Scorecard, the KPI Scorecards feature has not been enabled. See [Enabling the KPI Scorecards Feature](#).

3. In the KPI Scorecard portlet, click the **Set Up** link to open a KPI Scorecard Setup popup.
 1. In the **KPI Scorecard** list, select the scorecard that you want to display.
If you do not see a suitable scorecard, you may need to create a new KPI scorecard. See [Creating a KPI Scorecard](#).
 2. By default, the **Restrict To** list is set to **All** to indicate that scorecard results are not filtered. If you want to filter results, select **My Team** or **Only Mine**.
 3. By default, the **Orientation** list is set to **KPIs on Left**, meaning that the scorecard lists KPI labels on the left and date ranges across the top. To change this layout, select **Date Ranges on Left**.

4. Check or clear the **Show Trend Graph Icon** box to indicate whether you want the KPI Scorecard portlet to include icons that can be clicked to open popup trend graphs of KPI data. For more information, see [Setting Up Popup Trend Graphs](#).
 5. Check or clear the **Show Date Row** box to indicate whether to include explicit date ranges as the first row (or first column if you selected **Date Ranges on Left** for **Orientation**). This data is useful to display if the scorecard uses relative date ranges, such as 1 year ago.
 6. Click **Save**.
4. Review the portlet's contents and links. The portlet title matches the name of the selected KPI scorecard.
 1. Click **Refresh** to refresh portlet data.
 2. Click **Set Up** to change portlet settings.
 3. Click **Edit** or **Customize** to open the KPI scorecard and make changes to its definitions. For information, see [Editing a KPI Scorecard](#).
 4. Click **Export** to save scorecard results in an external CSV file.

Creating a KPI Scorecard

NetSuite enables you to create custom scorecards that can be displayed in the KPI Scorecard dashboard portlet.

To create a new KPI scorecard:

1. Go to Customization > Centers and Tabs > KPI Scorecards > New.
If this menu option is not available, the KPI Scorecards feature may not be enabled. See [Enabling the KPI Scorecards Feature](#). Or you may not have permission to create scorecards. Check with your account administrator to ensure you have the KPI Scorecards permission.
2. At the top of the page, you can enter basic scorecard information. See [Entering Basic Scorecard Information](#).
3. On the **KPIs** subtab of the **Content** subtab, you can add KPIs and define their comparisons, and add formulas and define formula expressions.

KPI Scorecard More

Save **Cancel** **Reset**

NAME *
Widget Metrics

OWNER
Varner, Nicholas

☐ USE PERIODS

DESCRIPTION

Content **Audience**

KPIs **Date Ranges** **Custom** **Highlighting**

#	KPI *	COMPARE VALUE TO	COMPARE WITH PREVIOUS	COMPARISON TYPE	INVERT COMPARISON	FORMULA	LESS IS MORE	HIDDEN	LABEL
	Bank Balance	Credit Card Balance		Ratio (Absolute)	<input type="checkbox"/>				

Add **Cancel** **Insert** **Remove** **Move Up** **Move Down** **Move To Top** **Move To Bottom**

Save **Cancel** **Reset**

- Scorecards can intermingle KPIs and formulas and compare them to each other, so you define KPIs and formulas in the same place using some slightly different fields on the subtab.
 - For KPI steps, see [Defining KPI Scorecard Comparisons](#).
 - For formula steps, see [Defining KPI Scorecard Formulas](#).
- If you define custom KPIs to be used in scorecards, you need to define their underlying saved searches on the **Custom** subtab of the **Content** subtab.

Only saved searches with a date field defined under **Available Filters** are available for use as custom KPIs in scorecards. The exception is if you enable the **Use Periods** option for a scorecard. Then only saved searches with a **Period** filter defined under **Available Filters** are available.
- After you have entered KPIs and formulas, you can reorder them by dragging and dropping or using the **Move** buttons.
- 4. On the **Date Ranges** (or **Periods**) subtab of the **Content** subtab, you can define multiple date ranges (or periods). These date ranges apply to all scorecard data. See [Defining KPI Scorecard Date Ranges or Periods](#).

After you have entered date ranges, you can reorder them by dragging and dropping or using the **Move** buttons.
- 5. On the **Highlighting** subtab of the content subtab, you can set highlighting options to make results more visible in KPI Scorecard portlets. See [Highlighting KPI Scorecard Results](#).
- 6. On the **Audience** subtab, you can define who has access to your scorecard, meaning who can put it in their KPI Scorecard portlet. You can base this definition on roles, departments, subsidiaries, groups, employees, or partners. See [Sharing a Custom KPI Scorecard](#).
- 7. When you have completed all steps to define the scorecard, click **Save**.

Entering Basic Scorecard Information

To create a new KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards > New. For more information, see [Creating a KPI Scorecard](#). Then you can enter basic scorecard information at the top of the page.

To enter basic KPI scorecard information:

1. Enter a **Name** for the KPI scorecard. This name will appear as the title of portlets displaying this scorecard.

By default, your name appears in the **Owner** dropdown list. If you are an administrator, you can define a different owner by selecting a different name.

2. If you want the KPI data to be calculated according to accounting periods rather than date ranges, check the **Use Periods** box.

When **Use Periods** is selected:

- The name of the **Date Ranges** subtab changes to **Periods**.
 - Only saved searches with a **Period** filter defined under **Available Filters** are available for use as custom KPIs in this scorecard.
 - You may encounter issues with KPI scorecard data if you have not set up accounting periods, or if you have not set the **Report by Period** preference to **All Reports** on the **Analytics** tab of the Set Preferences page.
3. (Optional) Enter a **Description** for the scorecard.

Defining KPI Scorecard Comparisons

You can define KPI scorecard comparisons when you are creating a new scorecard or editing an existing scorecard.

- To create a new KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards > New. For more information, see [Creating a KPI Scorecard](#), and [Entering Basic Scorecard Information](#).
- To edit an existing KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards and click Edit next to the KPI scorecard you want to edit.

To define KPI scorecard comparisons:

1. Click **Customize** from the KPI scorecard portlet dropdown list.
2. On the **KPIs** subtab of the **Content** subtab, select a KPI from the **KPI** list.
3. In the **Compare Value to** list, select a KPI to compare to the first KPI you selected.
4. If you selected a custom KPI from either dropdown list, go to the **Custom** subtab, and in the corresponding custom KPI list there, select the saved search to be used as the basis for the custom KPI.
 Only saved searches with a date field defined under **Available Filters** are available for use as custom KPIs in scorecards. The exception is if you enable the **Use Periods** option for a scorecard. Then only saved searches with a **Period** filter defined under **Available Filters** are available.
 Note that KPI scorecard custom KPI definitions are different from Key Performance Indicators portlet custom KPI definitions. For more information, see [Custom KPIs](#).
5. Check **Compare with Previous** if you want to compare the results of this comparison to the comparison defined in the row above this one on the **KPIs** subtab.
6. Select one of the following comparison types:
 - **Variance (Percent)** : $100 \times (B-A)/A$
 - **Variance (Absolute)** : $B-A$
 - **Ratio (Percent)** : $100 \times B/A$
 - **Ratio (Absolute)** : B/A
 - **Sum** : $A + B$
7. Check **Invert Comparison** if you want to invert the operation used to calculate the comparison type.
8. Enter a **Label** for the KPI if you want something other than the KPI name to display as a row or column header in the portlet.
9. Click **Add**, if you are adding a new KPI to the scorecard, or **OK**, if you are editing an existing KPI entry).




Warning: KPI scorecards do not support results that are unions of two comparisons. If you enter a KPI comparison as a row on the **KPIs** subtab and also enter a date range comparison on the **Date Ranges** subtab, that KPI comparison displays a result of N/A in the KPI Scorecard portlet. To work around this limitation, try defining the comparison as a formula instead. For example, instead of entering **Quota** for **KPI**, **Sales** for **Compare Value To**, and **Variance (Percent)** for **Comparison Type**, enter **Formula (Percent)** for **KPI** and $\{SALES\}/\{QUOTA\}$ for **Formula**. See [Defining KPI Scorecard Formulas](#).

Defining KPI Scorecard Formulas

You can define formulas to calculate KPI comparisons when you are creating a new scorecard or editing an existing scorecard. These formulas are similar to those used in Excel, and can include functions and

KPI IDs. A Formula popup page, available from the KPI scorecard record, provides dropdown menus that you can use to build formula expressions.

- To create a new KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards > New. For more information, see [Creating a KPI Scorecard](#), and [Entering Basic Scorecard Information](#).
- To edit an existing KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards and click Edit next to the KPI scorecard you want to edit.

 **Warning:** KPI scorecards do not support results that are unions of two comparisons. If you enter a KPI comparison as a row on the **KPIs** subtab and also enter a date range comparison on the **Date Ranges** subtab, that KPI comparison displays a result of N/A in the KPI Scorecard portlet. To work around this limitation, try defining the comparison as a formula instead. For example, instead of entering **Quota** for **KPI**, **Sales** for **Compare Value To**, and **Variance (Percent)** for **Comparison Type**, enter **Formula (Percent)** for **KPI** and **{SALES}/{QUOTA}** for **Formula**. See [Defining KPI Scorecard Comparisons](#).

To define KPI scorecard formulas:

1. Click **Customize** from the KPI scorecard portlet dropdown list.
2. On the **KPIs** subtab of the **Content** subtab, select a formula from the **KPI** list. The following choices are available:
 - **Formula (Currency)**
 - **Formula (Numeric)**
 - **Formula (Percent)**
3. Enter the formula's expression in the **Formula** column. Click the **Set Formula** icon to open the Formula popup. In this popup, you can:
 - Select from the **Function** list to add functions to the formula.
 - Select from the **KPIs** dropdown list to add KPI IDs to the formula. For a list of IDs and their corresponding KPI names, see [KPI IDs Available for Scorecard Formulas](#).
 - Edit the formula directly in the **Formula** field.

When you have finished entering the expression, click **Set**.

4. If you included a custom KPI in a formula, go to the **Custom** subtab, and in the corresponding custom KPI list, select the saved search to be used as the basis for the custom KPI.
 Only saved searches with a date field defined under **Available Filters** are available for use as custom KPIs in scorecards. The exception is if you enable the **Use Periods** option for a scorecard. Then only saved searches with a **Period** filter defined under **Available Filters** are available.
 KPI scorecard custom KPI definitions are independent of the custom KPIs selected for display in the Key Performance Indicators portlet. For more information, see [Custom KPIs](#).
5. If lower values are preferable for this formula's results, check the box in the **Less is More** column. When this option is enabled, downward arrows are green and upward arrows are red in the KPI scorecard portlet. (The default is the reverse.)
6. If you do not want this formula's results to display in the scorecard, check the **Hidden** box. This option is available so you can use a formula as the basis for another displayed comparison.
7. Enter a **Label** for the formula. This label appears as a row or column header in the portlet.
8. Click **Add**, if you are adding a new KPI to the scorecard, or **OK**, if you are editing an existing KPI entry).

KPI IDs Available for Scorecard Formulas

The following table lists the KPI IDs that are available for use in KPI scorecard formulas. For a description of each KPI, see [Standard Key Performance Indicators Table](#).

KPI Name	KPI ID
Authorized Commission	COMMISSIONS
Authorized Partner Commission	COMMISSIONSPARTNER
Bank Balance	BANKBAL
Cart Abandonment	CARTABANDON
Cases Closed	CLOSEDCASES
Cases Escalated	ESCALATEDCASES
Checkout Abandonment	CHECKOUTABANDON
Closed Issues	CLOSEDISSUES
COGS	COGS
Credit Card Balance	CREDITCARDBAL
Custom KPI #1	CUSTOM
Custom KPI #2	CUSTOM2
Custom KPI #3	CUSTOM3
Custom KPI #4	CUSTOM4
Custom KPI #5	CUSTOM5
Custom KPI #6	CUSTOM6
Custom KPI #7	CUSTOM7
Custom KPI #8	CUSTOM8
Custom KPI #9	CUSTOM9
Custom KPI #10	CUSTOM10
Deferred Revenue	DEFERREDREVENUE
Employees	EMPLOYEES
Equity	EQUITY
Estimated Commission	ECOMMISSIONS
Estimated Partner Commission	ECOMMISSIONSPARTNER
Expenses	EXPENSES
Fixed Assets	FIXEDASSET
Forecast	FORECAST
Forecast (Alt. Sales)	FORECASTASA
Forecast Override	FORECASTOVERRIDE
Forecast Override (Alt. Sales)	FORECASTOVERRIDEASA
Gross New Leads	NEWLEADSGROSS

KPI Name	KPI ID
Hosted Page Hits	HOSTEDSITETRAFFIC
Income	INCOME
Inventory	INVENTORY
Long Term Liabilities	LONGTERMLIAB
My Utilization	UTILIZATION
Net Cash Flow	NETCASHFLOW
New Business	NEWBUSINESS
New Business (Orders Alt. Sales)	NEWBUSINESSORDALT
New Business (Sales Orders)	NEWBUSINESSORD
New Cases	NEWCASES
New Customers	NEWCUSTOMERS
New Customers (Sales Orders)	NEWCUSTOMERSORD
New Issues	NEWISSUES
New Leads	NEWLEADS
New Opportunities	NEWOPPORTUNITIES
New Visitors	NEWVISITORS
Open Cases	OPENCASES
Open Estimates	ESTIMATESRANGE
Open Issues	OPENISSUES
Open Opportunities	OPPORTUNITIESRANGE
Open Prospects	PROSPECTS
Open Quotes	ESTIMATESRANGE
Operating Cash Flow	OPERCASHFLOW
Operating Expenses	OPERATINGEXPENSES
Opportunities Lost	OPPORTUNITIESLOST
Opportunities Won	OPPORTUNITIESWON
Orders	ORDERS
Other Assets	OTHERASSET
Other Current Assets	OTHERCURRENTASSET
Other Current Liabilities	OTHERCURRENTLIAB
Paid Commission	PCOMMISSIONS
Paid Partner Commission	PCOMMISSIONSPARTNER
Payables	PAYABLES
Payroll	PAYROLL
Pipeline (Alt. Sales Projected)	PIPELINEASA

KPI Name	KPI ID
Pipeline (Alt. Sales Weighted)	PIPELINEWEIGHTEDASA
Pipeline (Projected)	PIPELINE
Pipeline (Weighted)	PIPELINEWEIGHTED
Pipeline Deals	PIPELINEDEALS
Profit	PROFIT
Quota	QUOTA
Quota (Alt. Sales)	QUOTAASA
Quota Reps	QUOTAREPS
Receivables	RECEIVABLES
Revenue	REVENUE
Sales	SALES
Sales (Cash Basis)	SALESCASHBASIS
Sales (Orders)	BOOKINGS
Sales (Orders Alt. Sales)	BOOKINGSALT
Total Open Opportunities	OPPORTUNITIES
Total Open Quotes	ESTIMATES
Total Orders (Count)	TOTALORDERS
Total Pipeline (Alt. Sales Projected)	TOTALPIPELINEASA
Total Pipeline (Alt. Sales Weighted)	TOTALPIPEWEIGHTEDASA
Total Pipeline (Projected)	TOTALPIPELINE
Total Pipeline (Weighted)	TOTALPIPEWEIGHTED
Total Pipeline Deals	TOTALPIPEDEALS
Total Sales (Orders)	TOTALBOOKINGS
Unique Visitors	VISITORTRAFFIC
Web Orders	WEBORDERS
Web Revenue	WEBREVENUE
Web Site Hits	SITETRAFFIC

You can enter KPI IDs in a scorecard formula by selecting a KPI name from the KPI dropdown list in the scorecard's Formula popup window. Open this popup by clicking on the Set Formula icon that is available when you add a formula to the scorecard's KPIs subtab. For more information, see [Defining KPI Scorecard Formulas](#).

If you include a custom KPI's ID in a scorecard's formula, you need to go to the scorecard's Custom subtab, and select a saved search in the corresponding custom KPI dropdown list there.

For an example of how to use formulas in KPI scorecards, check out NetSuite's prebuilt Financial Ratios scorecard that is available to users with permission to see the Trial Balance report. You can review the formulas in this scorecard as examples. See [Financial Ratios Scorecard Formulas](#).

Defining KPI Scorecard Date Ranges or Periods

You can define the date ranges to use in KPI data calculations when you are creating a new scorecard or editing an existing scorecard.

- To create a new KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards > New. For more information, see [Creating a KPI Scorecard](#), and [Entering Basic Scorecard Information](#).
- To edit an existing KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards and click Edit next to the KPI scorecard you want to edit.

For lists of date and period ranges available for KPI scorecard comparisons, see [Date Ranges for KPI Scorecards](#) and [Period Ranges for KPI Scorecards](#).

Note: If you have checked the **Use Periods** box on a KPI scorecard, you need to define periods rather than date ranges, and the name of the **Date Ranges** subtab is changed to **Periods**. Please note that you cannot clear the **Use Periods** box after the KPI scorecard has been saved.

To define date ranges for a KPI scorecard:

1. On the **Date Ranges** subtab of the **Content** subtab, in the **Range** column, specify date ranges to be applied to all KPI scorecard data.
2. In the **Compare Value to** field, select a date range to compare to the first range you selected.
3. Check **Compare with Previous** if you want to compare the results for this comparison to the date ranges listed above this one.
4. Select one of the following comparison types:
 - **Variance (Percent)** : $100 \times (B-A)/A$
 - **Variance (Absolute)** : $B-A$
 - **Ratio (Percent)** : $100 \times B/A$
 - **Ratio (Absolute)** : B/A
 - **Sum** : $A + B$
5. Check the box in the **Invert Comparison** column if you want to invert the operation used to calculate the comparison type.
6. Enter a **Label** for this date range. This label appears as a column or row header in the portlet.
7. Click **Add**, if you are adding a new KPI to the scorecard, or **OK**, if you are editing an existing KPI entry).

If you select multiple relative date ranges, such as 2 months ago, you can display the explicit dates in the KPI Scorecard portlet, by checking the Show Date Row box in the KPI Scorecard Setup dialog. See [Adding a KPI Scorecard Portlet to a Dashboard](#).

Warning: KPI scorecards do not support results that are unions of two comparisons. If you enter a KPI comparison as a row on the **KPIs** subtab and also enter a date range comparison on the **Date Ranges** subtab, that KPI comparison displays a result of N/A in the KPI Scorecard portlet. To work around this limitation, try defining the comparison as a formula instead. For example, instead of entering **Quota** for KPI, **Sales** for **Compare Value To**, and **Variance (Percent)** for **Comparison Type**, enter **Formula (Percent)** for KPI and $\{SALES\}/\{QUOTA\}$ for **Formula**. See [Defining KPI Scorecard Formulas](#).

Date Ranges for KPI Scorecards

Below, in alphabetical order, are the date ranges that you can select for comparisons on the Date Ranges subtab of a KPI Scorecard page.

Note: If you check the Use Periods box on this page, period ranges are listed on a Periods subtab instead. See [Period Ranges for KPI Scorecards](#).

- April last year
- April last year to date
- April this year
- August last year
- August last year to date
- August this year
- August this year to date
- December last year
- December last year to date
- December this year
- December this year to date
- February last year
- February last year to date
- February this year
- February this year to date
- January last year
- January last year to date
- January this year
- January this year to date
- January through April last year
- January through April this year
- January through August last year
- January through August this year
- January through February last year
- January through February this year
- January through July last year
- January through July this year
- January through June last year
- January through June this year
- January through March last year
- January through March this year
- January through May last year
- January through May this year
- January through November last year
- January through November this year
- January through October last year
- January through October this year
- January through September last year
- January through September this year

- July last year
- July last year to date
- July this year
- July this year to date
- June last year
- June last year to date
- June this year
- June this year to date
- March last year
- March last year to date
- March this year
- March this year to date
- May last year
- May last year to date
- May this year
- May this year to date
- November last year
- November last year to date
- November this year
- November this year to date
- October last year
- October last year to date
- October this year
- October this year to date
- September last year
- September last year to date
- September this year
- September this year to date
- calendar week 2 last month
- calendar week 2 same month last fiscal quarter
- calendar week 2 same month last fiscal year
- calendar week 2 this month
- calendar week 3 last month
- calendar week 3 same month last fiscal quarter
- calendar week 3 same month last fiscal year
- calendar week 3 this month
- calendar week 4 last month
- calendar week 4 same month last fiscal quarter
- calendar week 4 same month last fiscal year
- calendar week 4 this month
- first 2 weeks last month (first 14 days)

- first 2 weeks same month last fiscal quarter (first 14 days)
- first 2 weeks same month last fiscal year (first 14 days)
- first 2 weeks this month (first 14 days)
- first 3 weeks last month (first 21 days)
- first 3 weeks same month last fiscal quarter (first 21 days)
- first 3 weeks same month last fiscal year (first 21 days)
- first 3 weeks this month (first 21 days)
- first 4 weeks last month (first 28 days)
- first 4 weeks same month last fiscal quarter (first 28 days)
- first 4 weeks same month last fiscal year (first 28 days)
- first 4 weeks this month (first 28 days)
- first fiscal half fiscal year before last
- first fiscal half fiscal year before last to date
- first fiscal half last fiscal year
- first fiscal half last fiscal year to date
- first fiscal half this fiscal year
- first fiscal half this fiscal year to date
- first fiscal quarter fiscal year before last
- first fiscal quarter fiscal year before last to date
- first fiscal quarter last fiscal year
- first fiscal quarter last fiscal year to date
- first fiscal quarter this fiscal year
- first fiscal quarter this fiscal year to date
- first month fiscal quarter before last
- first month fiscal quarter before last to date
- first month last fiscal quarter
- first month last fiscal quarter to date
- first month same fiscal quarter fiscal year before last
- first month same fiscal quarter fiscal year before last to date
- first month same fiscal quarter last fiscal year
- first month same fiscal quarter last fiscal year to date
- first month this fiscal quarter
- first month this fiscal quarter to date
- first three fiscal quarters fiscal year before last
- first three fiscal quarters last fiscal year
- first three fiscal quarters this fiscal year
- first two fiscal quarters of fiscal year before last
- first two fiscal quarters of last fiscal year
- first two fiscal quarters of this fiscal year
- first two months fiscal quarter before last
- first two months last fiscal quarter

- first two months same fiscal quarter fiscal year before last
- first two months same fiscal quarter last fiscal year
- first two months this fiscal quarter
- fiscal half before last
- fiscal half before last to date
- fiscal quarter before last
- fiscal quarter before last to date
- fiscal year before last
- fiscal year before last to date
- five days ago
- five days from now
- four days ago
- four days from now
- four weeks starting this week
- fourth fiscal quarter fiscal year before last
- fourth fiscal quarter fiscal year before last to date
- fourth fiscal quarter last fiscal year
- fourth fiscal quarter last fiscal year to date
- fourth fiscal quarter this fiscal year
- fourth fiscal quarter this fiscal year to date
- last business week
- last fiscal half
- last fiscal half one fiscal year ago
- last fiscal half to date
- last fiscal quarter
- last fiscal quarter one fiscal year ago
- last fiscal quarter to date
- last fiscal quarter two fiscal years ago
- last fiscal year
- last fiscal year to date
- last month
- last month one fiscal quarter ago
- last month one fiscal year ago
- last month to date
- last month two fiscal quarters ago
- last month two fiscal years ago
- last rolling half
- last rolling quarter
- last rolling year
- last week
- last week to date

- last year
- last year to date
- month after next
- month after next to date
- month before last
- month before last to date
- next business week
- next fiscal half
- next fiscal quarter
- next fiscal year
- next four weeks
- next month
- next one half
- next one month
- next one quarter
- next one week (7 rolling days)
- next one year
- next week
- ninety days ago
- ninety days from now
- one year before last
- previous fiscal quarters last fiscal year
- previous fiscal quarters this fiscal year
- previous months last fiscal half
- previous months last fiscal quarter
- previous months last fiscal year
- previous months same fiscal half last fiscal year
- previous months same fiscal quarter last fiscal year
- previous months this fiscal half
- previous months this fiscal quarter
- previous months this fiscal year
- previous one day
- previous one half
- previous one month
- previous one quarter
- previous one week
- previous one year
- previous rolling half
- previous rolling quarter
- previous rolling year
- same day fiscal quarter before last
- same day fiscal year before last

- same day last fiscal quarter
- same day last fiscal year
- same half last fiscal year
- same day last month
- same day last week
- same day month before last
- same day week before last
- same fiscal half last fiscal year
- same fiscal half last fiscal year to date
- same fiscal quarter fiscal year before last
- same fiscal quarter last fiscal year
- same fiscal quarter last fiscal year to date
- same month fiscal quarter before last
- same month fiscal year before last
- same month last fiscal quarter
- same months last fiscal quarter to date
- same month last fiscal year
- same month last fiscal year to date
- same week fiscal year before last
- same week last fiscal year
- second fiscal half fiscal year before last
- second fiscal half fiscal year before last to date
- second fiscal half last fiscal year
- second fiscal half last fiscal year to date
- second fiscal half this fiscal year
- second fiscal half this fiscal year to date
- second fiscal quarter fiscal year before last
- second fiscal quarter fiscal year before last to date
- second fiscal quarter last fiscal year
- second fiscal quarter last fiscal year to date
- second fiscal quarter this fiscal year
- second fiscal quarter this fiscal year to date
- second month fiscal quarter before last
- second month fiscal quarter before last to date
- second month last fiscal quarter
- second month last fiscal quarter to date
- second month same fiscal quarter fiscal year before last
- second month same fiscal quarter fiscal year before last to date
- second month same fiscal quarter last fiscal year
- second month same fiscal quarter last fiscal year to date
- second month this fiscal quarter
- second month this fiscal quarter to date

- sixty days ago
- sixty days from now
- start of last month to end of its first week
- start of last month to end of its fourth week
- start of last month to end of its second week
- start of last month to end of its third week
- start of same month last fiscal quarter to end of its first week
- start of same month last fiscal quarter to end of its fourth week
- start of same month last fiscal quarter to end of its second week
- start of same month last fiscal quarter to end of its third week
- start of same month last fiscal year to end of its first week
- start of same month last fiscal year to end of its fourth week
- start of same month last fiscal year to end of its second week
- start of same month last fiscal year to end of its third week
- start of this month to end of its first week
- start of this month to end of its fourth week
- start of this month to end of its second week
- start of this month to end of its third week
- start of week 5 last month to end of last month
- start of week 5 same month last fiscal quarter to end of that month
- start of week 5 same month last fiscal year to end of that month
- start of week 5 this month to end of this month
- ten days ago
- ten days from now
- third fiscal quarter fiscal year before last
- third fiscal quarter fiscal year before last to date
- third fiscal quarter last fiscal year
- third fiscal quarter last fiscal year to date
- third fiscal quarter this fiscal year
- third fiscal quarter this fiscal year to date
- third month fiscal quarter before last
- third month fiscal quarter before last to date
- third month last fiscal quarter
- third month last fiscal quarter to date
- third month same fiscal quarter fiscal year before last
- third month same fiscal quarter fiscal year before last to date
- third month same fiscal quarter last fiscal year
- third month same fiscal quarter last fiscal year to date
- third month this fiscal quarter
- third month this fiscal quarter to date
- thirty days ago
- thirty days from now


- this business week
- this fiscal half
- this fiscal half to date
- this fiscal quarter
- this fiscal quarter to date
- this fiscal year
- this fiscal year to date
- this month
- this month to date
- this rolling half
- this rolling quarter
- this rolling year
- this week
- this week to date
- this year
- this year to date
- three days ago
- three fiscal quarters ago
- three fiscal quarters ago to date
- three fiscal years ago
- three fiscal years ago to date
- three months ago
- three months ago to date
- today
- today to end of this month
- tomorrow
- two days ago
- two days from now
- week 1 last month (days 1–7)
- week 1 same month last fiscal quarter (days 1–7)
- week 1 same month last fiscal year (days 1–7)
- week 1 this month (days 1–7)
- week 2 last month (days 8–14)
- week 2 same month last fiscal quarter (days 8–14)
- week 2 same month last fiscal year (days 8–14)
- week 2 this month (days 8–14)
- week 3 last month (days 15–21)
- week 3 same month last fiscal quarter (days 15–21)
- week 3 same month last fiscal year (days 15–21)
- week 3 this month (days 15–21)
- week 4 last month (days 22–28)
- week 4 same month last fiscal quarter (days 22–28)

- week 4 same month last fiscal year (days 22–28)
- week 4 this month (days 22–28)
- week 5 last month (day 29–month's end)
- week 5 same month last fiscal quarter (day 29–month's end)
- week 5 same month last fiscal year (day 29–month's end)
- week 5 this month (day 29–month's end)
- week after next
- week after next to date
- week before last
- week before last to date
- yesterday
- 1 day ago
- 2 days ago
- 3 days ago
- 4 days ago
- 5 days ago
- 6 days ago
- 7 days ago
- 1 week ago
- 2 weeks ago
- 3 weeks ago
- 4 weeks ago
- 5 weeks ago
- 6 weeks ago
- 7 weeks ago
- 8 weeks ago
- 1 month ago
- 2 months ago
- 3 months ago
- 4 months ago
- 5 months ago
- 6 months ago
- 7 months ago
- 8 months ago
- 9 months ago
- 10 months ago
- 11 months ago
- 12 months ago
- 1 fiscal quarter ago
- 2 fiscal quarters ago
- 3 fiscal quarters ago
- 4 fiscal quarters ago

- 5 fiscal quarters ago
- 6 fiscal quarters ago
- 7 fiscal quarters ago
- 8 fiscal quarters ago
- 1 fiscal half ago
- 2 fiscal halves ago
- 3 fiscal halves ago
- 4 fiscal halves ago
- 5 fiscal halves ago
- 6 fiscal halves ago
- 7 fiscal halves ago
- 8 fiscal halves ago
- 1 fiscal year ago
- 2 fiscal years ago
- 3 fiscal years ago
- 4 fiscal years ago
- 5 fiscal years ago
- 6 fiscal years ago
- 7 fiscal years ago
- 8 fiscal years ago

Period Ranges for KPI Scorecards

If you check the Use Periods box on a KPI Scorecard page, you can select the following period ranges, on the Periods subtab, for scorecard comparisons.

 **Note:** If you do not check the Use Periods box, date ranges are listed on a Date Ranges subtab instead. See [Date Ranges for KPI Scorecards](#).

The following period ranges are listed alphabetically:

- First Fiscal Quarter Last FY
- First Fiscal Quarter This FY
- Fiscal Quarter Before Last
- Fiscal Year Before Last
- Fourth Fiscal Quarter Last FY
- Fourth Fiscal Quarter This FY
- Last Fiscal Quarter
- Last Fiscal Quarter One Fiscal Year Ago
- Last Fiscal Quarter to Period
- Last Fiscal Year
- Last Fiscal Year to Period
- Last Period
- Last Period One Fiscal Quarter Ago

- Last Period One Fiscal Year Ago
- Last Rolling 18 Periods
- Last Rolling 6 Fiscal Quarters
- Period Before Last
- Same Fiscal Quarter Last FY
- Same Fiscal Quarter Last FY to Period
- Same Period Last FY
- Same Period Last Fiscal Quarter
- Second Fiscal Quarter Last FY
- Second Fiscal Quarter This FY
- Third Fiscal Quarter Last FY
- Third Fiscal Quarter This FY
- This Fiscal Quarter
- This Fiscal Quarter to Period
- This Fiscal Year
- This Fiscal Year to Period
- This Period

After the alphabetical list, the following periods are listed chronologically: each fiscal year, quarter, and month for the periods set up in your system. For more information about accounting periods, see the help topic [Setting Up Accounting Periods](#).

Highlighting KPI Scorecard Results

You can set up highlighting of KPI scorecard results when you are creating a new scorecard or editing an existing scorecard. Highlighting makes results more visible in the KPI Scorecard portlet.

KPI Scorecard				
INDICATOR	ACCOUNTING BOOK	THIS PERIOD	LAST PERIOD	CHANGE
Current Ratio	Primary Accounting Book	8.81	8.85	↓ -0.46%
Receivables Turnover	Primary Accounting Book	0	0	N/A
Days Sales Outstanding	Primary Accounting Book	7,941.1	N/A	N/A
Inventory Turnover	Primary Accounting Book	0	0	N/A
Days Inventory On Hand	Primary Accounting Book	N/A	N/A	N/A

- To create a new KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards > New. For more information, see [Creating a KPI Scorecard](#), and [Entering Basic Scorecard Information](#).
- To edit an existing KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards and click Edit next to the KPI scorecard you want to edit.

To set highlighting options for a result in a KPI scorecard:

1. Select a KPI from the dropdown list.
2. Select an option in the **Highlight If...** column, to indicate how the result should be compared to the **Threshold** value. The following options are available:

- Always
 - Less Than
 - Greater Than
 - Magnitude Greater Than
 - Magnitude Less Than
3. Enter a **Threshold** value.
 4. Select the **Date Range** or **Period** to determine whether highlighting should be applied when the comparison with the threshold is performed. The available options include All and the date ranges or periods set on the **Date Ranges** or **Periods** subtab.
 5. You can use any of the following options to specify the highlighting to be applied to the results that exceed or fall short of the specified **Threshold** value.
 - Use the **Image** column to select an image to be displayed with the highlighted result in the KPI scorecard portlet.
 - Use the **Text Color** column to select a text color other than the default for the highlighted result.
 - Use the **Background Color** column to select a background color other than the default for the highlighted result.
 - Check the box in the **Bold** column to display the highlighted result in bold text.
 - Check the box in the **Headline** column to display the highlighted result as a headline, in large bold text at the top of the KPI Scorecard portlet.



Note: Up to four scorecard results can be displayed as headlines.

KPI Scorecard More

Save Cancel Reset Actions ▾

Name *
Custom Financial Ratios

Owner
17 Varner, Nicholas ▾

☒ Use Periods

Description

Content Audience

KPIs • Periods • Custom • **Highlighting**

KPI	HIGHLIGHT IF...	THRESHOLD	PERIOD	IMAGE	TEXT COLOR	BACKGROUND COLOR	BOLD	HEADLINE
All ▾	Always		All					

✓ Add ✕ Cancel ➕ Insert 🗑 Remove

Save Cancel Reset Actions ▾

Sharing a Custom KPI Scorecard

You can define an audience for your KPI scorecard when you are creating a new scorecard or editing an existing scorecard. Members of that audience can display your custom scorecard in their KPI Scorecard

portlets. You can base the audience definition on roles, departments, subsidiaries, groups, employees, or partners.

- To create a new KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards > New. For more information, see [Creating a KPI Scorecard](#), and [Entering Basic Scorecard Information](#).
- To edit an existing KPI scorecard, go to Customization > Centers and Tabs > KPI Scorecards and click Edit next to the KPI scorecard you want to edit.

To define an audience for a KPI scorecard:

1. On the KPI Scorecard record, click the **Audience** subtab.
2. Use the list boxes provided to define the audience with whom you want to share the portlet. You can check a **Select All** box to include everyone or select individual list items, holding down the Ctrl key.
3. Click **Save**.

Editing a KPI Scorecard

If you own a KPI scorecard, you can make changes to it. To open a custom KPI scorecard, you can:

- In the KPI Scorecard portlet, click the Edit link, or
- Go to Customization > Centers and Tabs > KPI Scorecards and click Edit next to the scorecard.

If you want to customize a prebuilt KPI scorecard, you can open it and make changes, then save it with a different name. To open a prebuilt KPI scorecard, you can:

- In the KPI Scorecard portlet, click the Customize link, or
- Go to Setup > Customization > KPI Scorecards and click Customize next to the scorecard.

You can perform the following tasks:

- [Entering Basic Scorecard Information](#)
- [Defining KPI Scorecard Comparisons](#)
- [Defining KPI Scorecard Formulas](#)
- [Defining KPI Scorecard Date Ranges or Periods](#)
- [Highlighting KPI Scorecard Results](#)
- [Sharing a Custom KPI Scorecard](#)

Financial Ratios Scorecard

NetSuite provides a prebuilt Financial Ratios scorecard to help you analyze your business's financial position and operating efficiency. This scorecard includes metrics built with embedded formulas that incorporate standard NetSuite key performance indicators (KPIs).

The scorecard displays metrics for the current accounting period and the previous accounting period, and shows the percentage change between periods for each metric. Metrics include:

- Current Ratio
- Receivables Turnover
- Days Sale Outstanding
- Inventory Turnover

- Days Inventory on Hand
- Asset Turnover
- Profit Margin on Sales
- Return on Assets
- Return on Equity
- Debt to Total Assets
- Debt to Equity

To view the formulas used to calculate these metrics, see [Financial Ratios Scorecard Formulas](#).

The Financial Ratios scorecard's data is based on a set of NetSuite standard reports, and you can click on the scorecard's metrics to drill down into each of the detailed reports. By default, the scorecard is available to you only if you have permission to view the Trial Balance report. If you have this permission, you can display this scorecard in your KPI Scorecard portlet.

Administrators can review this scorecard's definitions and modify them to create a custom Financial Ratios scorecard, including giving permission to additional users to display the scorecard on their dashboard by changing the audience for the scorecard. For information, see [Editing a KPI Scorecard](#).



Note: You may encounter issues viewing Financial Ratios scorecard data if you have not set up accounting periods or if you have not set the **Report by Period** preference to **All Reports** at Home > Set Preferences, the **Analytics** tab.

To display the Financial Ratios scorecard on your dashboard:

1. Add a KPI Scorecard portlet to your dashboard.
 1. On the page where you want to see the scorecard, click the **Personalize** link.
 2. In the Personalize Dashboard panel, click the **KPI Scorecard** icon or drag it onto the dashboard.
2. In the KPI Scorecard portlet's menu, click the **Set Up** link.
3. Select **Financial Ratios** from the **KPI Scorecard** list, and click **Save**.

To review the Financial Ratios scorecard formulas:

- Go to Customization > Centers and Tabs > KPI Scorecards, and in the KPI Scorecards list, click **Financial Ratios**.

To customize the Financial Ratios scorecard:

1. In the Financial Ratios KPI Scorecard portlet, click **Customize** in the portlet's menu, or go to Customization > Centers and Tabs > KPI Scorecards, and click **Customize** next to **Financial Ratios**.
2. Notice that the name of the scorecard is changed automatically. You can make additional changes and click **Save**. For information, see [Editing a KPI Scorecard](#).

Financial Ratios Scorecard Formulas

The following table lists the formulas used to calculate data for the prebuilt Financial Ratios scorecard. This scorecard is available if you have permission to see the Trial Balance report. Formula components are standard NetSuite KPI IDs.

Scorecard Ratio	Formula
Current Ratio	$\frac{(\{BANKBAL\} + \{RECEIVABLES\} + \{OTHERCURRENTASSET\})}{(\{PAYABLES\} + \{CREDITCARDBAL\} + \{OTHERCURRENTLIAB\})}$
Receivables	$\{SALES\} / \{RECEIVABLES\}$
Days Sales Outstanding	$\{DAYS\} / (\{SALES\} / \{RECEIVABLES\})$
Inventory Turnover	$\{COGS\} / \{INVENTORY\}$
Days Inventory On Hand	$\{DAYS\} / (\{COGS\} / \{INVENTORY\})$
Asset Turnover	$\{SALES\} / (\{BANKBAL\} + \{RECEIVABLES\} + \{OTHERCURRENTASSET\} + \{FIXEDASSET\} + \{OTHERASSET\})$
Profit Margin on Sales	$\{PROFIT\} / \{INCOME\}$
Return on Assets	$\{PROFIT\} / (\{BANKBAL\} + \{RECEIVABLES\} + \{OTHERCURRENTASSET\} + \{FIXEDASSET\} + \{OTHERASSET\})$
Return on Equity	$\{PROFIT\} / \{EQUITY\}$
Debt to Total Assets	$\frac{(\{PAYABLES\} + \{CREDITCARDBAL\} + \{OTHERCURRENTLIAB\} + \{LONGTERMLIAB\})}{(\{BANKBAL\} + \{RECEIVABLES\} + \{OTHERCURRENTASSET\} + \{FIXEDASSET\} + \{OTHERASSET\})}$
Debt to Equity	$\frac{(\{PAYABLES\} + \{CREDITCARDBAL\} + \{OTHERCURRENTLIAB\} + \{LONGTERMLIAB\})}{\{EQUITY\}}$

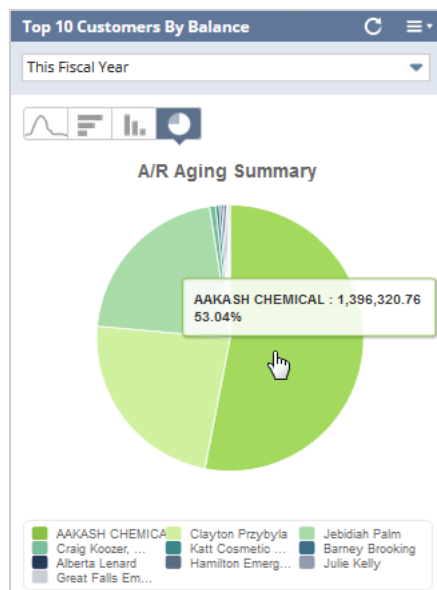
- For more information about this scorecard, see [Financial Ratios Scorecard](#).
- For information about the underlying report, see the help topic [Trial Balance Report](#).
- For a list of standard KPI IDs, see [KPI IDs Available for Scorecard Formulas](#).
- For a list of standard KPIs and descriptions, see [Standard Key Performance Indicators Table](#).
- For information about adding formulas to KPI scorecards, see [Defining KPI Scorecard Formulas](#).

Report Snapshots Overview

NetSuite includes a large number of standard reports that you can run to obtain detailed information about your business. For immediate access to reports' summary data, NetSuite enables you to add Report Snapshot portlets to your dashboard. Report Snapshot portlets offer quick looks at important business results every time you view your dashboard.

Each Report Snapshot portlet displays a high-level summary of a report's results for a selected date or time period. You can configure the number and order of results, and choose the format that is most useful for you, including four different chart types, or a list. You can define the look and feel of each chart by setting its theme and background. Each portlet also includes menu options to print content, to download content to a PNG, JPG, PDF, or SVG file, and to view the underlying report's detailed data.

When you roll over a data point in a report snapshot chart, its value displays.



Adding Report Snapshots

For instructions for adding Report Snapshot portlets to your dashboard, see [Adding a Report Snapshot Portlet](#). The available snapshots vary according to enabled features, and each user's roles and permissions. They may include the following:

- **Standard Report Snapshots** - You can select from a list of predefined report snapshots. See [Standard Report Snapshots Table](#).
- **Custom Report Snapshots** - You can create a custom report snapshot from a customized report. See [Creating Custom Report Snapshots](#).
- **Sales Management Report Snapshots** - You can choose to view sales management report summaries rolled up to different levels of management hierarchy. See [Sales Management Snapshots](#).

Using Report Snapshots

After you have added a report snapshot to your dashboard, you can configure the data that is displayed.

- Click thumbnails in the portlet to try different chart types.



- Select the time period for which report snapshot data is displayed.
 - Date Selector for Comparative Report Snapshots:

two fiscal quarters ago ▼

- Date Selector for Other Report Snapshots:

As of
two fiscal quarters ago ▼

- For more configuration options, click the Set Up link.

For more information, see [Setting Up a Report Snapshot Portlet](#).

Adding a Report Snapshot Portlet

You can add Report Snapshot portlets to some dashboard pages. The report snapshots that are available for display in a dashboard portlet depend on your role and the features you have enabled. A report snapshot is available to you if you have permission to view the underlying report's data.

To add a Report Snapshot portlet to a page:

1. Click the **Personalize** link in the upper right corner of the dashboard. You can also use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Report Snapshots** tab of the **Personalize Dashboard** palette, click the **Report Snapshots** icon or drag it onto the dashboard.
If the **Report Snapshots** tab does not display in the Personalize Dashboard panel, it means you cannot add Report Snapshot portlets to this page.
3. Click the **Set Up** link in the portlet's menu to select the report snapshot you want to be displayed in the portlet.

The snapshots you have added appear in portlets on the page. When you log in, the information in each portlet refreshes.

- You can manually refresh report snapshot data at any time by clicking the portlet's Refresh icon.
- You can click a thumbnail in the portlet to change the type of chart used to display data. For most snapshots, choices are line, bar, column, or pie charts.
- You can change the dates for displayed report snapshot data using the dropdown list in the portlet.
- You can select a menu option to print the portlet content, to download content to a PNG, JPG, PDF, or SVG file, or to view the underlying report.
- You may be able to change layout options for report snapshot data by clicking the portlet's Set Up link, if it is available. Layout options include whether to display report results in a list or a graph, the default chart type for the graph, the theme and background for the chart, how many results to display, and the order in which to display results. For more information, see [Setting Up a Report Snapshot Portlet](#).

Notes:

- Comparative sales report snapshots have different setup options than other types of report snapshots. For details, see [Setup Options for Comparative Sales Report Snapshots](#).

- Report snapshot list text truncates at 25 characters when the report snapshot portlet is in the left or right dashboard column. To avoid this truncation, place the portlet in the middle column. Also, report snapshot list amounts are rounded to the nearest whole number and do not display decimal places.

Standard Report Snapshots Table

The following table lists NetSuite standard report snapshots, in alphabetical order. You can see the snapshots available by clicking the Set Up link in the Report Snapshot portlet's menu and checking the Snapshot list. You may see a subset of snapshots listed in the following table, depending upon your role and the features you have enabled.

Note: A report snapshot is only available to you if you have permission to view the underlying report's data.

Report Snapshot	Description
Campaigns By Activity	This snapshot shows the top campaigns by percent of campaign messages viewed during the date range you choose. This snapshot is based on the Campaign Response Summary Report .
Campaigns By Profitability	This snapshot shows the top campaigns by profitability during the date range you choose. This snapshot is based on the Campaign ROI Analysis Summary Report .
Comparative Sales	This line graph compares the total income and reimbursed expenses for customers in the periods you choose. It excludes the following transaction types—Journal, Deposit, Credit Card, Credit Card Refund and Check. This snapshot is based on the Comparative Sales report. This snapshot offers different setup options from other standard snapshots. For information, see Setup Options for Comparative Sales Report Snapshots .
Comparative Sales (Orders)	This line graph compares the total income for sales orders in the periods you choose. It excludes the following transaction types—Journal, Deposit, Credit Card, Credit Card Refund and Check. This snapshot is based on the Comparative Sales (Orders) report. This snapshot offers different setup options from other standard snapshots. For information, see Setup Options for Comparative Sales Report Snapshots .
Comparative Sales (Orders Alt. Sales)	This snapshot shows a comparison of the total dollar values of sales orders, based on alternate sales amounts (ASA) in the two date ranges you select. These values exclude the following transaction types: journal, deposit, credit card, credit card refund, and check. This snapshot is based on the Comparative Sales (Alt. Sales) report. This snapshot offers different setup options from other standard snapshots. For information, see Setup Options for Comparative Sales Report Snapshots .
Customers By Balance	This snapshot shows the customers with the largest account balances due for the date range you select. This snapshot is based on the A/R Aging Summary Report .
Customers By Forecast	This snapshot shows the top customers by forecast during the time period you select. The forecast includes: <ul style="list-style-type: none"> total income and reimbursed expenses total value of open estimates that are set to be included in the forecast and are expected to close in the period you have selected total value of open opportunities that are expected to close in the period you have selected and do not include an estimate that is set to appear in the forecast <p>Note: The values of the estimates and opportunities that are included in the forecast depend on the preferences you have set at Setup > Sales > Preferences > Sales Preferences on the Forecasts subtab.</p>

Report Snapshot	Description
	This snapshot is based on the Forecast by Customer Summary Report .
Customers By Forecast Outstanding	<p>This snapshot shows the top customers by outstanding forecast during the time period you select. This snapshot includes:</p> <ul style="list-style-type: none"> ■ total value of open estimates that are set to be included in the forecast and are expected to close in the period you have selected ■ total value of open opportunities that are expected to close in the period you have selected and do not include an estimate that is set to appear in the forecast <p>Note: The values of the estimates and opportunities that are included in the forecast depend on the preferences you have set at Setup > Sales > Preferences > Sales Preferences on the Forecasts subtab.</p> <p>This snapshot is based on the Forecast (Outstanding) by Customer Summary Report.</p>
Customers By Hosted Page Hits	<p>This snapshot shows the top customers by hosted page hits in your website during the date range you choose.</p> <p>This snapshot is based on the Hosted Page Hits by Customer Report.</p>
Customers By Page Hits	<p>This snapshot shows the top customers by page hits in your website during the date range you choose.</p> <p>This snapshot is based on the Page Hits by Customer Report.</p>
Customers By Pipeline	<p>This snapshot shows the top customers by pipeline. The pipeline includes the projected amount of open opportunities and open estimates expected to close in the date range you choose. This excludes the total of opportunities with estimates set to be included in the forecast.</p> <p>This snapshot is based on the Pipeline by Customer Summary Report.</p>
Customers By Profitability	<p>This snapshot shows the most profitable customers for the date range you select. Profit is calculated by subtracting cost from revenue.</p> <p>This snapshot is based on the Customer Profitability Summary Report.</p>
Customers By Sales	<p>This snapshot shows the top customers by sales during the time period you select.</p> <p>This snapshot is based on the Sales by Customer Summary Report.</p>
Customers By Sales Orders	<p>This snapshot shows the total of the approved sales orders for each customer during the date range you select.</p> <p>This snapshot is based on the Sales Orders by Customer Summary Report.</p>
Customers By Total Pipeline	<p>This snapshot shows the top customers by total pipeline. The total pipeline includes the projected amount of all opportunities and estimates that are open as of the date you choose. This excludes the total of opportunities with estimates set to be included in the forecast.</p> <p>This snapshot is based on the Total Pipeline by Customer Summary Report.</p>
Earned Value	<p>This snapshot shows the top projects by earned value as of the date you choose. This data illustrates the effectiveness of project resources.</p> <p>This snapshot is based on the Earned Value by Project Report, which includes data on the difference between projects' earned value and planned value, and the difference between projects' earned value and actual cost.</p>
Forecast By Status	<p>This snapshot shows your forecast divided by customer statuses. This enables you to understand where sales are in the sales cycle.</p> <p>This snapshot is based on the Forecast by Status Summary Report.</p>
Hosted Page Hits	<p>This snapshot shows you the number of hits to Web pages hosted in your NetSuite file cabinet during the date range you choose.</p> <p>This snapshot is based on the Hosted Page Hits Report.</p>
Hosted Page Hits By Unique Visitor	<p>This snapshot shows the top hosted pages by unique-visitor hits in your website during the date range you choose.</p> <p>This snapshot is based on the Hosted Page Hits Report.</p>

Report Snapshot	Description
Internal Search Hits	This snapshot shows the keywords that website visitors are using to search within your site and the search results being returned. This snapshot is based on the Internal Search Summary Report .
Inventory Sales	This snapshot shows the top selling items by amount of revenue generated. This snapshot is based on the Inventory Revenue Report .
Invoices	This snapshot shows the top open invoices by customer during the date range you choose. This snapshot is based on the Open Invoices Reports .
Items By Qty Sold	This snapshot shows the top selling items by quantity sold. This snapshot is based on the Sales by Item Summary Report .
Items By Sales	This snapshot shows the top items by sales during the date range you choose. This snapshot is based on the Sales by Item Summary Report .
Items By Sales Orders	This snapshot shows the top items by sales order income during the date range you choose. This snapshot is based on the Sales Orders by Item Summary Report .
Keywords By Revenue	This snapshot shows the top keywords website customers enter in search engines by the revenue generated from customers who used those keywords during the date range you choose. This snapshot is based on the Search Engine Keywords Summary Report .
Keywords By Visitors	This snapshot shows the top keywords website customers enter in search engines and follow results to your site during the date range you choose. This snapshot is based on the Search Engine Keywords Summary Report .
Lead Sources By Activity	This snapshot shows the top lead sources by the quantity of lead records entered in NetSuite during the date range you choose. This snapshot is based on the Lead Source Analysis Summary Report .
Open Escalations	This snapshot shows the number of escalated cases during the range you choose grouped by employee. This snapshot is based on the Open Escalations report.
Open Estimates	This snapshot shows the estimates with the highest projected amounts expected to close during the date range you select. Open estimates have a probability between 0% and 100% and have not been closed by an order or actual. This snapshot is based on the Estimates to Close Report .
Open Opportunities	This snapshot shows the opportunities with the highest projected amounts expected to close during the date range you select. Open opportunities have a probability between 0% and 100% and have not been closed by an order or actual. This snapshot is based on the Opportunities to Close Detail Report .
Open Sales Orders	This snapshot shows the top open sales orders by customer during the date range you choose. This snapshot is based on the Open Sales Orders Report .
Page Hits	This snapshot shows the top pages by hits in your website during the date range you choose. This snapshot is based on the Page Hits Report .
Page Hits By Unique Visitors	This snapshot shows the top pages by unique-visitor hits in your website during the date range you choose. This snapshot is based on the Page Hits Report .
Partners By Activity	This snapshot shows the top partners by the quantity of activities they have entered in NetSuite during the date range you choose. This snapshot is based on the Partner Activity Summary Report .

Report Snapshot	Description
Partners By Customer Acquisition	This snapshot shows the top partners by the quantity of customers they acquired in the date range you choose. This snapshot is based on the Customers by Partner Summary Report .
Partners By Sales	This snapshot shows the top partners by sales during the period you choose. This snapshot is based on the Sales by Partner Summary Report .
Partners By Sales Orders	This snapshot shows the top partners by sales order totals during the date range you choose. This snapshot is based on the Sales Orders by Partner Summary Report .
Pipeline By Status	This snapshot shows the total of the open estimates and opportunities expected to close in the date range you choose grouped by status. This snapshot is based on the Pipeline by Status Summary Report .
Promotion By Sales Orders	This snapshot shows sales order income by promotion during the date range you choose. This snapshot is based on the Sales Orders by Promotion Code Summary Report .
Prospects	This snapshot shows the top prospects by projected value of estimates expected to closed during the date range you choose. This snapshot is based on the Prospect Analysis Summary Report .
Referrer By Revenue	This snapshot shows the top referring websites by the revenue they deliver during the date range you choose. This snapshot is based on the Referrer Summary Report .
Referrer By Visitors	This snapshot shows the top referring websites by the quantity of shoppers they deliver during the date range you choose. This snapshot is based on the Referrer Summary Report .
Sales Reps By Activity	This snapshot shows the top sales reps by the number of sales activities they have initiated during the time period you select. Activities include events, tasks, notes, messages, and campaigns. This snapshot is based on the Sales Activity by Sales Rep Summary Report .
Sales Reps By Forecast	This snapshot shows the top sales reps by forecast for the date range you select. The forecast includes: <ul style="list-style-type: none"> ■ total income and reimbursed expenses from customers ■ total value of open estimates that are set to be included in the forecast and are expected to close in the period you have selected ■ total value of open opportunities that are expected to close in the period you have selected and do not include an estimate that is set to appear in the forecast <p>Note: The values of the estimates and opportunities that are included in the forecast depend on the preferences you have set at Setup > Sales > Preferences > Sales Preferences on the Forecasts subtab.</p> <p>This snapshot is based on the Alt. Sales and Billings Forecast vs. Quota Report.</p>
Sales Reps By Pipeline	This snapshot shows the top sales reps by pipeline. This snapshot includes open estimates and opportunities expected to close in the date range you select. This snapshot is based on the Pipeline by Sales Rep Summary Report .
Sales Reps By Sales	This snapshot shows the top-selling sales reps for the date range you select. This snapshot is based on the Sales by Sales Rep Summary Report .
Sales Reps By Sales Orders	This snapshot shows the top-selling sales reps by sales orders for the date range you select. This snapshot is based on the Sales Orders by Sales Rep Summary Report .
Sales Reps By Sales Orders Alt. Sales	This snapshot shows the sales reps with the greatest dollar amounts of sales orders, based on alternate sales amounts (ASA), for the date range you select. This snapshot is based on the Sales Orders by Sales Rep Summary Report .

Report Snapshot	Description
Sales Reps By Total Pipeline	This snapshot shows the top sales reps by total pipeline. This snapshot includes all estimates and opportunities that are open as of the date you select on the snapshot. This snapshot is based on the Total Pipeline by Sales Rep Summary Report .
Support Reps By Closed Cases	This snapshot shows the top support reps by the quantity of closed cases during the date range you choose. This snapshot is based on the Closed Case Analysis Summary Report .
Support Reps By Open Cases	This snapshot shows the top support reps by the quantity of open cases during the date range you choose. This snapshot is based on the Open Case Analysis Summary Report .
Time by Employee	This snapshot shows the employees who have the most time recorded during the date range you choose. This snapshot is based on the Time by Employee Summary Report .
Time by Item	This snapshot shows the service items with the most time recorded against them during the date range you choose. This snapshot is based on the Time by Item Summary Report .
Time by Project	This snapshot shows the projects with the most time recorded against them during the date range you choose. This snapshot is based on the Time by Customer Summary Report .
Total Open Estimates	This snapshot shows the estimates with the highest projected amounts that were open as of the date you select. Open estimates have a probability between 0% and 100% and have not been closed by an order or actual. This snapshot is based on the Total Open Estimates Report .
Total Open Opportunities	This snapshot shows the opportunities with the highest projected amounts that were open as of the date you select. Open opportunities have a probability between 0% and 100% and have not been closed by an order or actual. This snapshot is based on the Total Open Opportunities Detail Report .
Total Pipeline By Statuses	This snapshot shows the projected and weighted total of all the open estimates and opportunities for each customer status. Only estimates that are marked to be included in forecasts are included in this report. Only opportunities that have not been converted to estimates or other transactions are included. This snapshot is based on the Total Pipeline by Statuses Summary Report .
Utilization	This snapshot shows the employees with the highest productivity during the date range you choose. This snapshot is based on the Utilization by Employee report.
Web Items Ordered	This snapshot shows you the quantity of website orders by item during the period you choose. This snapshot is based on the Item Orders Report .
Web Items Ordered By Unique Visitors	This snapshot shows the top items by quantity that were ordered from unique visitors in your website during the period you choose. This snapshot is based on the Item Orders Report .

Setup Options for Comparative Sales Report Snapshots

Most report snapshots let you compare at most two date ranges. For Comparative Sales Report Snapshots, including Comparative Sales, Comparative Sales (Orders), and Comparative Sales (Orders Alt. Sales), you can choose whether to compare two or three date ranges in a snapshot line graph. For both two and three data point comparisons, a number of standard date range sets are provided. Additionally, you can define custom date ranges for either sort of comparison, of the type you choose: daily, weekly, monthly, quarterly, or yearly.

Report setup options are different for comparative sales report snapshots than for other report snapshots. Click the Set Up link in this type of portlet to open a popup where you can:

- Define the number of data points to be graphed in the snapshot (2 or 3).
 - Select a set of standard date ranges, or select Custom to create your own set of date ranges, for comparison.
- If you select Custom, you need to:
- Select a time interval for date ranges in the Date Range Type dropdown list: daily, weekly, monthly, quarterly, or yearly. The following topics for lists of date range comparisons that are available:
 - [Standard Two-Point Date Range Comparisons](#)
 - [Standard Three-Point Date Range Comparisons](#)
 - Select specific date ranges in the grid below. (The grid's date range fields become dropdown list selectors after Custom is selected for Date Range.)
- Select a default chart type for the portlet data. Note that comparative sales report snapshots support a different set of chart types than other report snapshots: Area, Line, Column, and Bar.
 - Select a chart theme to define the look and feel of chart data.
 - Select a chart background to define the display behind chart data.
 - Select the color for each date range. (If you do not make selections here, defaults for the selected chart theme are used.)

You also can select or change a standard date range comparison from a dropdown list in the portlet, and click portlet thumbnails to change the type of chart displayed.

Standard Two-Point Date Range Comparisons

The following standard date range sets are available for two data point comparisons:

- Today vs Yesterday
- This Week vs Last Week
- This Month vs Last Month
- This Month vs Same Last Year
- This Month vs Same Last Qtr
- This Qtr vs Last Qtr
- This Qtr vs Same Last Year
- This Year vs Last Year
- Last Month vs Month Before Last
- Last Month vs Same Last Qtr
- Last Month vs Same Last Year
- Last Qtr vs Qtr Before Last
- Last Qtr vs Same Last Year
- Last Year vs. Year Before Last

For more information, see [Setting Up KPI Comparisons](#).

Standard Three-Point Date Range Comparisons

The following standard date range sets are available for three data point comparisons:

- Today vs. Yesterday vs. 2 Days Ago
- This Week vs. Last Week vs. Week Before Last
- This Month vs. Last Month vs. Month Before Last
- This Month vs. Last Month vs. Same Last Year
- This Month vs. Same Last year vs. Same Year Before Last
- This Month vs. Same Last Qtr vs. Same Qtr Before Last
- This Month vs. Same Last Qtr vs. Same Last Year
- This Qtr vs. Last Qtr vs. Qtr Before Last
- This Qtr vs. Last Qtr vs. Same Last Year
- This Qtr vs. Same Last Year vs. Same Year Before Last
- This Year vs. Last Year vs. Year Before Last
- Last Three Months
- Last Month vs. Same Last Qtr vs. Same Qtr Before Last
- Last Month vs. Same Last Year vs. Same Year Before Last
- Last Three Qtrs
- Last Qtr vs. Same Last Year vs. Year Before
- Last Three Years

For more information, see [Setting Up KPI Comparisons](#).

Creating Custom Report Snapshots

If standard report snapshots are not providing the information that you need, you can create custom report snapshots to be displayed in dashboard portlets. To create a custom snapshot, customize a standard report that currently generates snapshots, and create a snapshot of the customized report when you run the report.

You can create custom report snapshots only from reports that currently are used to generate standard report snapshots. For a list of these reports, see [Reports Available for Custom Report Snapshots](#).

To create a custom report snapshot:

1. Open the report you want to customize.

For a list of reports you can use, see [Reports Available for Custom Report Snapshots](#).

- Go to Reports > Reports Overview, find the report to customize, point to it and click **Customize** next to its name.
- If the report is displayed in a report snapshot portlet, click **View Report** in the portlet's menu, and then click **Customize** in the report's footer area.


2. Use the Report Builder to customize the report.

For information about how to customize a report, see the help topic [Report Customization](#).



Important: By default, when users click a custom report snapshot link to view detailed data, drilldown goes to the standard detail report, not to a customized detail report.

3. Click **Save** or **Run Report**.

4. On the report results page, click the **Create Snapshot** icon .

Note: The **Create Snapshot** icon is always visible, but is only enabled for custom reports that display results data.

5. On the Customize Report Snapshot page, define layout options for portlets displaying this custom report snapshot.
 1. Enter a **Portlet Title** that will be displayed in the header bar of this snapshot's portlet. The title must be unique.
 2. On the **List** subtab, select the columns you want to display in the narrow and wide versions of the portlet.

The narrow version of the portlet can display only two columns.

The wide version shows only when the portlet is positioned in the center column of the dashboard.
 3. On the **Graph** subtab, select the columns of data to show in the graph's X and Y axes.
6. Click **Save**.

This snapshot is now available for you to add to a dashboard portlet. For instructions, see [Adding a Report Snapshot Portlet](#). When a custom snapshot is displayed in a portlet, you can click the portlet's Edit link to make changes.

Note: If you receive the error message "This record already exists" when you click **Save**, it means there is a previously created custom snapshot that has the same name. You can change your report snapshot title or delete the previously created snapshot. See [Deleting a Custom Report Snapshot](#).

Deleting a Custom Report Snapshot

You can delete a custom report snapshot when it is displayed in a report snapshot portlet.

To delete a custom report snapshot:

1. Find the custom report snapshot on your dashboard.
2. Click the report snapshot dropdown list and select **Edit**.
3. From the **Actions** menu, select **Delete**.

Reports Available for Custom Report Snapshots

The only reports that you can customize to create custom report snapshots are reports that are used to generate standard report snapshots.

Note: The reports available to you in NetSuite depend upon your role and the features you have enabled.

The following reports can be customized to create custom report snapshots.

- Alt.Sales and Billings Forecast vs. Quota

- Campaign ROI Analysis Summary
- Campaign Response Summary
- Closed Case Analysis Summary
- Customers by Partner Summary
- Customer Profitability Summary
- Earned Value by Project
- Forecast (Outstanding) by Customer Summary
- Forecast by Item Summary
- Forecast by Sales Rep Summary
- Forecast by Status Summary
- Forecast by Customer Summary
- Hosted Page Hits Detail
- Hours & Earnings
- Internal Search Summary
- Inventory Revenue Summary
- Item Orders Summary
- Lead Source Analysis Summary
- Open Case Analysis Summary
- Open Invoices
- Open Sales Orders
- Page Hits Detail
- Page Hits Summary
- Partner Activity Summary
- Payroll Liabilities
- Pipeline by Sales Rep Summary
- Pipeline by Status Summary
- Pipeline by Customer Summary
- Prospect Analysis Summary
- Referrer Summary
- Sales Activity by Sales Rep Summary
- Sales by Customer Summary
- Sales by Item Summary
- Sales by Partner Summary
- Sales by Sales Rep Summary
- Sales Orders by Customer Summary
- Sales Orders by Item Summary
- Sales Orders by Partner Summary
- Sales Orders by Promotion Code Summary
- Sales Orders by Sales Rep Summary

- (Search Engine) Keywords Summary
- Time by Customer Summary
- Time by Employee Summary
- Time by Item Summary
- Total Open Estimates
- Total Open Opportunities Detail
- Total Pipeline by Customer Summary
- Total Pipeline by Sales Rep Summary
- Total Pipeline by Statuses Summary
- Utilization by Employee (deprecated)

Sales Management Snapshots

If you are a sales manager, administrator, or executive with access to sales reports, you can display sales management report snapshots in dashboard portlets. NetSuite provides the following sales management report snapshots:

- **Sales Managers by Sales Orders.** This snapshot shows the approved sales order totals for each manager and rep in a selected date range, and is based on the Sales Orders by Sales Rep Summary report.
- **Sales Managers by Forecast.** This snapshot shows the quota, actual sales, calculated forecast, and override forecast, for each manager and rep in a selected date range, and is based on the Alt. Sales and Billings Forecast vs. Quota report.
- **Sales Managers by Sales.** This snapshot shows the sales revenue by each sales manager in the selected period range, and is based on the Sales by Sales Rep report.

Sales management reports roll up and display data according to the sales management hierarchy. This hierarchy is based on the supervisors defined on employee records.

After you have added a sales management snapshot portlet, you can click the portlet's Set Up link to select the hierarchical level of data to display.

- For example, you may have four levels of hierarchy: the CEO, the sales VP, sales managers, and sales reps. If you select the 2nd level of hierarchy for a snapshot, you will see information for the CEO and the sales VP only. However, the totals include the corresponding subordinate's totals.
- In the Report Snapshot portlet, you can click a + or - sign next to a sales manager to display more or less data.

To display a sales management snapshot:

1. Click the **Personalize** link in the upper right corner of the dashboard. You can also use the **Personalize Dashboard** link in the **Settings** portlet.
2. On the **Report Snapshots** tab of the **Personalize Dashboard** palette, click the **Report Snapshots** icon or drag it onto the dashboard.
If the **Report Snapshots** tab does not display in the Personalize Dashboard panel, it means you cannot add Report Snapshot portlets to this page.
3. Click the **Set Up** link in the portlet's menu.
4. In the **Snapshot** dropdown list, select either of the following sales management snapshots:

- Sales Managers by Forecast
 - Sales Managers by Sales
 - Sales Managers by Sales Orders
5. In the **Hierarchy Level** list, select the level of management data to display.
 6. Click **Save**.

The snapshot portlet refreshes to display the selected level of hierarchy. From the portlet, you also can do the following:

- Change the date or period range to display results for a different time period.
- Click a + or - next to a manager's name to expand or collapse displayed data.
- Click **Refresh** to reload and update the portlet's data.
- Choose **Print**, **Download**, or **View Report** menu options.

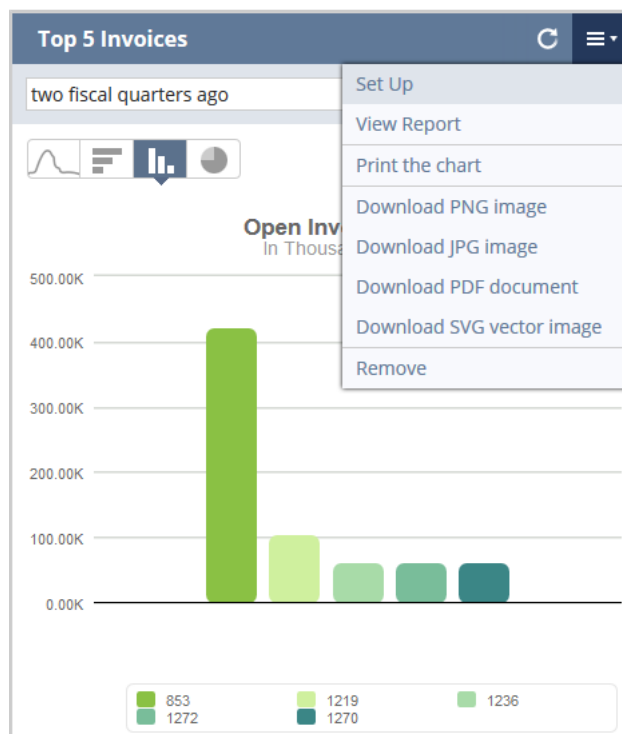
Setting Up a Report Snapshot Portlet

When you have added a Report Snapshot portlet to your dashboard, you can configure the portlet to display data in the most useful manner.

To learn how to add a Report Snapshot portlet, see [Adding a Report Snapshot Portlet](#).

To set up a Report Snapshot portlet:

1. In the report snapshot portlet, click  and select **Set Up** from the menu.



2. The portlet setup window displays.

Report Options

Save Cancel Reset

Snapshot
Invoices

Default Chart Type
Column

As of
two fiscal quarters ago

Display Type ☐ List ☒ Graph

Display Order ☒ Top ☐ Bottom

How Many
Top 5

Chart Theme
Global Theme

Custom Series Color

Background Type
Global Background

3. In the portlet setup window, you can:

- For custom report snapshots, change the portlet title, or the name of the snapshot.
- Use the **Snapshot** menu to select the report snapshot to display.
- Use the **As of** or **Date Range** dropdown menu to change the time period for which data is displayed.
- Choose a **Display Type** to indicate whether data should be displayed as a list or a graph.
Note the following about report snapshots that display lists:
 - Report snapshot list text truncates at 25 characters when the report snapshot portlet is in the left or right dashboard column. To avoid this truncation, place the portlet in the middle column.
 - Report snapshot list amounts are rounded to the nearest whole number and do not display decimal places.
 - Graph-specific settings, including **Default Chart Type**, **Chart Theme**, **Custom Series Color**, and **Background Type**, are not available for lists.
- Choose a **Display Order**.
 - If you select **Top**, your data will be shown in order starting with the greatest value.
 - If you select **Bottom**, your data will show in order starting with the lowest value.
- From the **How Many** list, select the number of results to display. Choices include:
 - **Top 5**
 - **Top 10**

- **Top 15**
 - **Top 25**
 - **Top 50**
 - For graphs, use the **Default Chart Type** dropdown menu to set the default chart used for snapshot data. You can later change the chart type by clicking a thumbnail in the portlet itself.
 - For comparative sales report snapshots, chart type options are **Area**, **Line**, **Bar**, and **Column**.
 - For other report snapshots, chart type options are **Line**, **Bar**, **Column**, and **Pie**.
 - For graphs, use the **Chart Theme** dropdown menu to set a look and feel for chart data:
 - **Global Theme** – uses the chart theme set in the Chart Themes section on the Home > Set Preferences page (the default). See the help topic [Setting Preferences for Appearance](#).
 - **Basic** – provides limited color contrast.
 - **Colorful** – provides more color contrast.
 - **Match Color Theme - Bold** – harmonizes with your choices in the Colors section on the Home > Set Preferences page, using bolder shades. See the help topic [Setting Preferences for Appearance](#).
 - **Match Color Theme - Light** – harmonizes with your choices in the Colors section on the Home > Set Preferences page, using lighter shades. See the help topic [Setting Preferences for Appearance](#).
 - For graphs, use the **Custom Series Color** field to enter a hexadecimal value for the color you want to use for the graph. Please note that this option is provided for backwards compatibility with custom chart colors defined prior to the introduction of chart themes in Version 2012 Release 2.
 - For graphs, use the **Background Type** dropdown menu to set the background display behind chart data:
 - **Global Background** – uses the background type set on the Set Preferences page (the default)
 - **Lines**
 - **Bands**
 - **Grid**
4. When you have finished configuring the portlet, click **Save** to save your configuration.

Note: Some report snapshot portlets do not include a Set Up link because these snapshots do not offer choices for data display. For custom snapshots, an Edit link may be available that provides some of the same settings as those available from the Set Up link.

Publishing Dashboards Overview

The NetSuite user interface is role-based, so that your role determines the set of tabbed pages, or **center**, that displays when you log in. Centers are tied to functional areas, such as Accounting, Marketing, Sales, and Support. NetSuite provides a default visual workspace, or **dashboard**, for each tabbed page, and lets you personalize your dashboards to fit your business. Administrators can share, or **publish**, their personalized dashboards to users logging in to the same center. A published dashboard can include one tabbed page, or multiple pages.

Published dashboards provide a consistent interface to users with related roles. This uniformity in dashboards' appearance can make it easier for users to work together, because they have ready access to the same data. Publishing dashboards also can save time, by allowing an administrator to set up dashboards for an entire team of users.

Permissions and Roles

To get started publishing dashboards, you need to understand the following:

- To publish dashboards, you must have the Publish Dashboards permission. A few administrative roles have this permission assigned by default, but most users do not. For more information, see [Publish Dashboards Permission](#).
- When you have the Publish Dashboards permission, you can publish dashboards to other users, designated by role. You can only publish a dashboard to roles that tie to the same center in which you have personalized the dashboard. For example, if your role is set to Account Administrator when you personalize a dashboard, you can publish it only to roles tied to the Classic center. If your role is set to Sales Administrator, you can publish a personalized dashboard only to roles tied to the Sales center. For more information, see [Publish Dashboards Permission](#).

Publishing a Dashboard

To publish a dashboard, you need to complete the following two steps:

1. **Personalize the dashboard you want to publish** – After you have verified that you have the Publish Dashboards permission, and logged in with the appropriate role, the next step to publishing a dashboard is to personalize one or more of your own tabbed pages to fit the team's business needs. Personalization can involve changes you make to the standard NetSuite tabs or the creation of custom tabs of your own. See [Dashboard Personalization](#) and [Creating Center Tabs](#).
2. **Publish the dashboard** – When you have finished personalizing your own tabbed pages, you can publish one or more of them to appear on other users' tabs. See [Publishing a Dashboard](#).

When you publish a dashboard, you make the following choices. Note that some choices can be changed after you have published the dashboard, and others cannot.

- The roles to which the dashboard should be published. (Can be changed later.)
- Whether the dashboard should be published to new users only or to both existing and new users, replacing existing users' dashboards. (Can be changed later.)
- The tabbed pages to include in the dashboard. (**Cannot be changed later.**)
- The restriction levels for users' dashboard personalizations. (**Cannot be changed later.**)

After you have published a dashboard, you can make further changes to it and apply these changes to users' dashboards. See [Applying Changes to Published Dashboards](#).

Publish Dashboards Permission

To publish dashboards, you must have the Publish Dashboards permission. A few administrative roles have this permission assigned by default, but most users do not. When you use the Publish Dashboard button, the dashboard will appear in the state of the dashboard for you and your corresponding role that is currently logged into NetSuite. If you make a change to a published dashboard, the dashboard will publish with those edits included. It is not possible to revert back to dashboard settings that were previously published.

If you have the Publish Dashboards permission, a Publish Dashboard link displays in the Settings portlet on your home page. If this link is not available, you do not have the permission.

For information, see the following topics:

- [Roles with Publish Dashboards Permission](#)
- [Adding the Publish Dashboards Permission](#)
- [Can Publish to Own Center Only](#)

Roles with Publish Dashboards Permission

By default, the Publish Dashboards permission is available to users assigned the following roles:

- **Administrator** – can publish dashboards to users assigned roles in the Classic Center.
- **Intranet Manager** – can publish dashboards to users assigned roles in the Ecommerce Management Center.
- **Issue Administrator** – can publish dashboards to users assigned roles in the Engineering Center
- **Marketing Administrator** – can publish dashboards to users assigned roles in the Marketing Center.
- **Product Manager** – can publish dashboards to users assigned roles in the Support Center.
- **QA Manager** – can publish dashboards to users assigned to roles in the Engineering Center.
- **Sales Administrator** – can publish dashboards to users assigned roles in the Sales Center.
- **Support Administrator** – can publish dashboards to users assigned roles in the Support Center.
- **System Administrator** – can publish dashboards to users assigned roles in the System Administrator Center.

Adding the Publish Dashboards Permission

If additional users require the Publish Dashboards permission, for example, in cases where centers do not have any existing roles with this permission, the account administrator can customize the users' roles to add the permission, or create a custom role with the permission.

For example, to allow the publishing of a dashboard to roles that use the Advanced Partner Center role, the account administrator can create a customized Advanced Partner Center role, add the Publish Dashboards permission to it, and assign the role to the user who needs to publish the dashboard.

The Publish Dashboards permission is listed on the Setup subtab of each Role record's Permissions subtab. For more information, see the help topic [Customizing or Creating NetSuite Roles](#).

Note: If the Global Permissions feature is enabled, the account administrator can add the Publish Dashboards permission directly to employee records' Global Permissions subtab, to be applicable to all of the employees' assigned roles.

Can Publish to Own Center Only

Be aware that even with the Publish Dashboards permission, you can publish dashboards only to other users with roles tied to the same center where you have personalized your dashboard, because only roles tied to the same center share the same set of tabbed pages. For example, if you are logged in as a sales administrator when you personalize a dashboard, only sales roles are available when you attempt to publish that dashboard.

The account administrator generally uses the Classic Center, which may not be shared with many other users. For this user to publish dashboards to users with roles in other centers, he or she must be assigned an additional role for each center where a published dashboard is needed. If any of these roles do not have the Publish Dashboards permission, it needs to be added. Then, this user can log in with each role to personalize and publish a dashboard to roles for the related center.

In other cases, it may make more sense for different users to publish dashboards to different centers. In all cases, you should be aware of the center for your role, know which other roles share your center, and ensure that you have the Publish Dashboards permission, BEFORE you personalize a dashboard that you want to publish.

Note: Dashboards published to the Advanced Partner Center are published to partner contacts as well as partners. If a partner or a partner contact modifies the dashboard content by, for example, adding a portlet, this change will appear on the dashboards of the partner and all partner contacts logged in using the same role.

Publishing a Dashboard

You can share your personalized dashboard with other users in your center by publishing it. A published dashboard can consist of one tabbed page or of multiple pages. When you publish a dashboard, you define the roles for users who will see the published dashboard, and what changes users will be able to make to the published dashboard.

Note: The minimum required screen width size when using a three column layout is 1400 pixels.

Before you attempt to publish a dashboard:

- Verify that you have the Publish Dashboards permission by checking for the Publish Dashboard link in your home page Settings portlet.
- Verify that the role you are currently using shares the same center as the roles to which you want to publish the dashboard. Do not begin personalizing a dashboard until you are sure that your role can publish to the users you want!

For more information, see [Publish Dashboards Permission](#).

- Personalize the home page by adding portlets that you want to be part of the published home page dashboard. For more information, see [Setting Up Dashboard Portlet Content](#).

Note: Please note that if your dashboard contains a calendar portlet that displays My Calendar, the published dashboard users will see their personal calendar, not the publisher's one.

- Personalize one or more of your own tabbed pages to be part of the published dashboard. You can personalize a page by making changes to a standard NetSuite tabbed page, as described in [Dashboard Personalization](#). Or, you can create your own custom tabbed page, as described in [Creating Center Tabs](#).

When you create a custom tab, you select the centers where it will display. For example, for a tab used by sales reps, you would select the Sales Center, and for a tab used by accounting clerks, you would select the Accounting Center. You also have the option of making a tab display in all centers. However, be aware that tabs applied to all centers are not available in published dashboards.

To publish a dashboard:


1. Go to your home page, and in the **Settings** portlet, click the **Publish Dashboard** link.
2. On the Publish Dashboard page, enter a name for the dashboard in the **Name** field, and, if desired, descriptive text in the **Notes** field. These fields are for your reference only and are not exposed to other users.
3. If you want to prevent users from removing Shortcuts portlet links on the published dashboard's pages, check the **Lock Shortcuts** box.
 - When you enable this option, users still can add and reorder links in their Shortcuts portlets.
 - For information about the Shortcuts portlet, see [Shortcuts Portlet](#).
4. To prevent users from removing Create New menu links on the published dashboard's page, check the **Lock New Bar** box.
 - When you enable this option, users still can add and reorder links in their Create New menu.
 - For information about the Create New menu, see the help topic [Using the Create New Menu](#).
5. On the **Apply To Roles** subtab, select the roles to which you want to publish this dashboard and indicate whether to publish the dashboard to new users only or to both new and existing users.
 1. Select a role from the **Role** list.

Only roles tied to the center that your current role uses are listed here, because you can only publish a dashboard to roles that share your center. If a role is not listed here, you cannot publish the dashboard to it when you are logged in with your current role. You may be able to log in with a different role, personalize a dashboard, and publish it to additional roles. For more information, see [Publish Dashboards Permission](#).


Roles that are inactive are not included in the list.
 2. By default, for a dashboard being published for the first time **Override existing user's settings** is set to **Yes**, indicating that this dashboard should be published to existing users with the selected role, replacing their current dashboards. Clear this check box if you want to publish the dashboard only to new users assigned the selected role.
 3. Click **Add**.
 4. Repeat the preceding steps for additional roles to which you want to publish the dashboard.

Only a part of the published dashboard content may be available to some users. Users can view only the dashboard content that their assigned roles give them permission to see.
6. On the **Apply To Tabs** subtab, select the tabbed pages that you have customized to be part of the published dashboard, and choose how you want to restrict users' changes to the published dashboard's pages.

1. Check the box in the **Apply** column next to each tabbed page you want to include in this dashboard.
2. In the **Mode** column, choose the level of restriction for users' changes to the selected page:
 - **Unlocked** – lets users make all changes to the selected page.
 - **Locked** – restricts users from making any changes to the selected page.
 - **Add/Move Content** – enables users to add and rearrange portlets on the selected page, and at the same time prevents them from removing portlets.

 **Note:** The **Add/Move Content** option prevents users from removing not only portlets that were added as part of the published dashboard but also the portlets they added themselves.

For more information, see [Restricting Users' Dashboard Personalizations](#).

 **Important:** After you have saved a published dashboard, you cannot redefine which tabbed pages are included or change their restriction modes, so make these choices very carefully.

7. Click **Save**.

The published dashboard is applied to users assigned the selected roles. They may need to log out and log back in to the system for changes to be visible. They also may need to clear their browser cache.

Assigning Published Dashboards to Users

You define the users for a published dashboard by selecting one or more roles when you first publish it. After the dashboard has been published, you can add or remove roles to change the users.

All of a published dashboard's information may not be available to all of its users. Users can view only the dashboard content that their assigned roles give them permission to see.

To assign saved dashboards to users:

1. Go to your home page, and in the Settings portlet, click the **List** link next to **Publish Dashboard**. A list of your dashboards appear.
2. Click **Edit** next to the name of the dashboard for which you want to change assigned users.
3. On the **Apply To Roles** subtab of the Published Dashboard page, you can:
 1. Add a role to which the dashboard should be published by placing the cursor in a blank line, selecting a role from the **Role** list, and clicking **Add**.
By default, for a previously published dashboard **Override existing user's settings** is set to **No**, indicating that the dashboard will be published only to new users assigned the selected role. Check this box to change it to **Yes** if you want to publish the dashboard to existing users with the selected role, replacing their current dashboards.
 2. Remove a previously selected role from the published dashboard's list by selecting the role and clicking the **Remove** button.
4. Click **Save**.

The published dashboard is applied to users with the selected roles. They may need to log out and log back in to the system for changes to be visible.

Restricting Users' Dashboard Personalizations

When you first publish a dashboard, you can set a restriction level that indicates the types of changes users can make to each tabbed page of the published dashboard.

You set this restriction level by selecting from the following three modes on the Publish Dashboard page's Apply To Tabs subtab:

- **Unlocked** – lets users make all changes to the selected page.
- **Locked** – restricts users from making any changes to the selected page.
- **Add/Move Content** – enables users to add and rearrange portlets on the selected page, and at the same time prevents them from removing portlets.

Note: The **Add/Move Content** option prevents users from removing not only portlets that were added as part of the published dashboard but also the portlets they added themselves.

When selecting a mode for each tabbed page, or tab, included in the published dashboard, you can specify different modes for each tab.

After you have saved a published dashboard, you cannot modify these modes, so make your selections very carefully!

Note: Each Publish Dashboard page has options for locking the Shortcuts portlet and the New Bar so that users cannot remove links. These options can be changed after a dashboard has been published.

Applying Changes to Published Dashboards

When you make changes to a personalized dashboard that you have published, you can apply these changes to the dashboards of all or some of the users for the published dashboard, based on users' assigned roles.

To change a published dashboard:

1. Log in with the role you were using when you published the dashboard.
2. Make changes to one or more of your dashboards that you previously published to other roles.
3. Go to your home page, and in the **Settings** portlet, click the **List** link next to **Publish Dashboard**.
4. Click **Edit** next to the dashboard you want to reapply to other roles.
5. On the **Apply To Roles** subtab of the Publish Dashboard page, you can apply your changed dashboard to users' dashboards based on their roles.

For each role to which you want to apply the changed dashboard, check the box in the **Override existing user's settings** column.

If you checked this box for a role when you initially published the dashboard, this box is not checked now. If you want to apply these changes to that role, you must check this box again.

6. Click the **Save and Update Content** button.

Note: If you click the Save button, the dashboard definition is saved, but the changes are not applied to users' dashboards.

Your changes to this published dashboard are applied to users assigned the selected roles. They may need to log out and log back in to the system for changes to be visible. Depending on your browser's

caching settings, users may need to manually refresh the page for each dashboard that has been updated.

Applying Updates for Bundled Published Dashboards

Changes to a dashboard installed by a bundle may be applied automatically, as part of bundle updates, to the dashboards of users with roles to whom the dashboard was previously published.

Whether these automatic updates to users' dashboards occur depends upon the setting for a related bundle preference. The user who updates the bundle in your account can indicate whether bundled dashboard updates should be applied only to the dashboard definition, or to both the definition and to the dashboards of all users with roles to which the dashboard was previously published.

If the updates are applied only to the dashboard definition, you can follow steps 2-6 above to apply updates to users' dashboards as desired. For information about the bundle update process, see the help topics [Installed Bundle Updates](#), [Reviewing the Preview Bundle Update Page](#), and [Set Bundle Update Preferences](#).