

Netgain **Accounting**
SUMMIT 25

How to Be a Great NetSuite Administrator

Rocky Mountain NetSuite User Group

Cory Anderson, Stratos ERP Partners

About Me



Cory Anderson

FOUNDER OF STRATOS ERP PARTNERS

- President of the Rocky Mountain NetSuite User Group since 2018
- Stratos ERP Partners is a NetSuite Alliance Partner



Continued

- Working with NetSuite since 2013
- 4 NetSuite certifications
- 8 Celigo certifications

Agenda

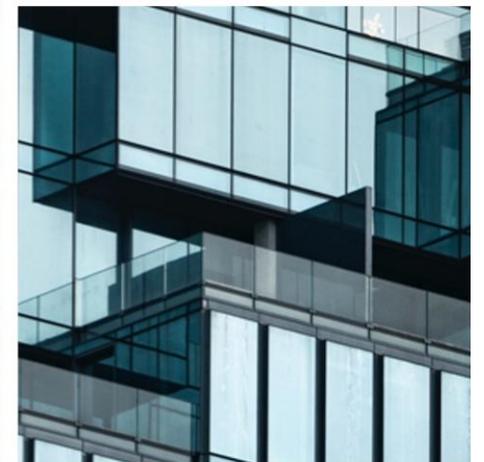
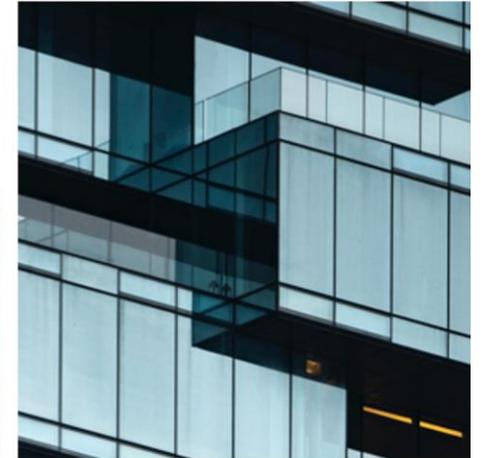
How to Be a Great NetSuite Administrator

- Understand the role of a NetSuite Administrator
- Learn best practices for customizing NetSuite
- Discover ways to help automate day-to-day tasks

Introduction

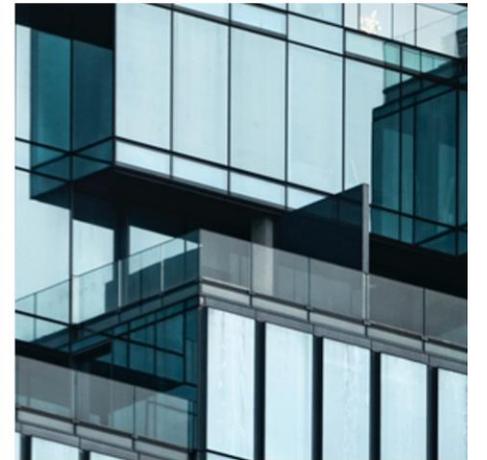
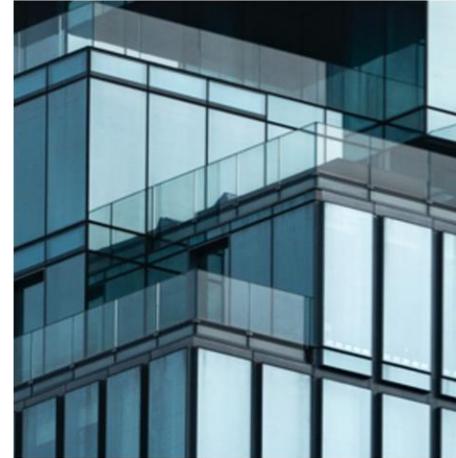
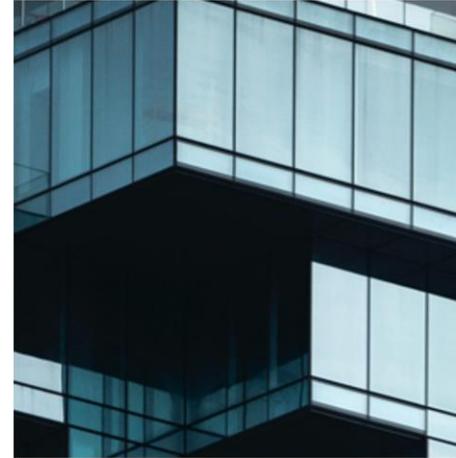
A NetSuite administrator is responsible for ensuring that users can perform their jobs without friction in NetSuite. They can achieve this through the following key points:

- Save time and resources by leveraging streamlined processes and automations
- Promote end user independence in NetSuite by providing the team with tools and methodologies



Introduction

- Reduce manual tasks and activities with simple configurations and modifications
- Maximize the value and impact of your Admin Role. Admin doesn't have to be, and in many cases, should not be a part time role.



Understanding the Role of a NetSuite Administrator

Let's dive in

Role In Implementation



Implementation phase is critical for setting up NetSuite to align with organizational goals.



Effective coordination and communication are paramount to ensure a successful implementation.



NetSuite Administrator acts as the bridge between stakeholders and technical teams.



NetSuite Admins should always evaluate the implementation to ensure a scalable and effective solution is being constructed.

Ongoing Support and Maintenance



Ongoing support and maintenance are essential for the smooth functioning of NetSuite.



NetSuite Administrator serves as a point of contact for addressing user concerns and technical issues.



Responsive maintenance helps prevent disruptions and ensures uninterrupted operations.

Optimization and Enhancements



Optimization and enhancement efforts are geared towards maximizing NetSuite's efficiency and effectiveness.



NetSuite Administrator leads initiatives to continuously analyze business processes for improvement opportunities.



Continuous optimization ensures NetSuite remains aligned with evolving business requirements and industry trends.

Administrator Key Functions and Best Practices

Data Integrity

Data integrity is foundational for accurate decision-making and compliance within NetSuite.

The NetSuite Administrator plays a pivotal role in ensuring data integrity through establishing data governance policies and standards.

Upholding data integrity safeguards the reliability and credibility of information within NetSuite.

Data Integrity Examples

- **Field-Level Validation** – mandatory fields on transactions such as Location, Class, and Department
- **Non-essential fields removed from forms**
- **Duplicate detection criteria setup and duplication management in place**
 - Vendors and customers
 - Restrict entity record creation to specific roles
 - Require entity approvals
- **Item creation process**
 - Ensure that all necessary fields are correctly populated
 - Ensure item is not a duplicate of existing item
 - Restrict item record creation to specific roles

Roles and Access



Managing roles and access permissions is crucial for maintaining security and data confidentiality in NetSuite.



NetSuite Administrator oversees roles and access by roles and role-based permissions to restrict user access based on job responsibilities.

Roles and Access Best Practices

- Roles should give enough permissions for someone to do their job without having to switch between roles constantly
- Start with the native roles, make a copy, rename with company prefix, then edit permissions as needed
- When new to NetSuite, be ready to modify roles as needed as people start working in the system
- Administrator role should be used sparingly. Do not just give everyone admin because it's easy. This ties back to data integrity.
- There should be at least one back up administrator.
- When someone leaves the company, remove access and all roles. Repeat in sandbox.

Manage Roles

VIEW

Default



Customize View

New Role

+ FILTERS



SHOW INACTIVES

EDIT

INTERNAL ID

NAME ▲

Customize

4

A/P Clerk

Customize

5

A/R Clerk

Customize

1

Accountant

Customize

2

Accountant (Reviewer)

Customize

1515

Accountant DL





Role

Save

Cancel

Change ID

General

NAME *

Stratos - Accountant

ID

_stratos_accountant

CENTER TYPE

Accounting Center

EMPLOYEE RESTRICTIONS

none - no default



ALLOW VIEWING

ISSUE ROLE

- DO NOT RESTRICT EMPLOYEE FIELDS
- RESTRICT TIME AND EXPENSES
- SALES ROLE
- SUPPORT ROLE
- CORE ADMINISTRATION PERMISSIONS

Subsidiary Restrictions

ACCESSIBLE SUBSIDIARIES

ALL

ACTIVE

USER SUBSIDIARY

SELECTED

ALLOW CROSS-SUBSIDIARY RECORD VIEWING

Reports and Saved Searches Best Practices

Reports and searches empower users to extract actionable insights from NetSuite data.

NetSuite Administrator facilitates reporting and searching functionalities.

Robust reporting and searching capabilities enable users to derive meaningful insights from NetSuite data.

Roles and Access Best Practices

- **Enforce a consistent naming convention**
 - Append the title with a department name, or employee initials such as [accounting] or [ca]
- **Ensure that only one set of financial reports are being used**
 - Think of this as “Reporting Integrity”
- **Take time to teach some end users how to create saved searches for their specific needs.**
 - Sometimes it’s best to be the only search creator/editor
- **Setup email notifications for commonly used reports/searches**
- **Use saved searches to monitor system activity such as when a new vendor or customer record is created.**

Saved Item Search

Item Search [ca]



Save



Cancel

Preview

New Template

Change ID

Actions

SEARCH TITLE *

Item Search [ca]

ID

customsearch4454

OWNER

Cory Anderson

PUBLIC

AVAILABLE AS LIST VIEW

Criteria

Results

Highlighting

Available Filters

Audience

Roles

Email



Use this tab to specify criteria that narrow down your search.



Activities

Payments

Transactions



A/R Aging Summary [stratos]

[View Detail](#)

CUSTOMER	CURRENT	3/26/2025 - 4/24/2025 (30)	2/24/2025 - 3/25/2025 (30)
	Open Balance	Open Balance	Open Balance
- No Customer/Project -	(\$500.00)	\$285,020.95	
3 Triangle	\$0.00	\$30,075.00	
ABC Co. ABC Company	\$98,940.53	\$211,934.89	
Above The Cloud	\$245,326.97	\$24,060.00	\$2,435.00
Advisors Institute	\$0.00	\$9,000.00	
Aerosol Applied Science	\$3,600.00	\$0.00	
Altima Technology	\$75,452.75	\$2,435.00	\$0.00

Sales Order Pending Fulfillment [warehouse]: Results

Edit this Search

+ FILTERS

   |   | EDIT

EDIT VIEW	ORDER TYPE ▲	*	DATE	AS-OF DATE	PERIOD	TAX PERIOD	TYPE	DOCUM
Edit View		*	2/4/2025		Feb 2025	Feb 2025	Sales Order	SO02
Edit View			2/4/2025		Feb 2025	Feb 2025	Sales Order	SO02



Cory's Saved Searches: Results

[Return To Criteria](#)

+ FILTERS

   |  

EDIT VIEW	FROM BUNDLE	TITLE
Edit View		Item Search [ca]

**Create a 'saved search'
saved search
or a 'report' saved search**

Saved Saved Search Search

[Set](#) [Cancel](#)

TITLE (TEXT)

contains

Dashboards

Dashboards offer a visual representation of key performance indicators (KPIs) and metrics within NetSuite.

NetSuite Administrator can optimize dashboards by role to provide relevant reporting, reminders, links, and metrics.

Dynamic dashboards enhance user engagement and facilitate informed decision-making in NetSuite.

Home

Viewing: Portlet date settings Personalize Layout

Reminders

- 0 Estimates to Print
- ⚠ Adv Approval POs Pending My Approval
- 3 Bill Lookup
- 1 Bills Overdue
- 0 Bills to Approve
- 0 Bills to Pay
- 0 Checks to Print
- 0 Credit Cards to Approve
- 0 Customers to Bill

Key Performance Indicators

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
COGS	This Period vs. Last Period	\$5,000	\$0	↑ N/A
Deferred Revenue	This Period vs. Last Period	\$0	\$0	0.0%
Employees	Today vs. Same Day Last Month	2	2	0.0%
Equity	This Period vs. Last Period	\$56,300	\$500	↑ 11,160.0%
Expenses	This Period vs. Last Period	\$15,000	\$0	↑ N/A
Fixed Assets	This Period vs. Last Period	\$0	\$0	0.0%
Inventory	Today vs. Same Day Last Month	\$0	\$0	0.0%
Income	This Period vs. Last Period	\$70,800	\$500	↑ 14,060.0%

Comparative Sales (Orders)



Report Snapshot

Portlet not set up
Please set up this portlet by clicking on the menu above.

Quick Search

SEARCH

SEARCH FOR

Customer History - Customer History

ID	TYPE	TYPE CODE	TRANSACTION	STATUS	DATE CREATED
46,611	Bill	VendBill	8984845	Bill : Pending Approval	5/17/2025 2:36 pm
10,975	Sales Order	SalesOrd	SO107	Sales Order : Pending A...	5/8/2025 3:38 pm
10,476	Item Fulfillment	ItemShip	IF64	Item Fulfillment : Shipp...	5/6/2025 10:36 am
46,511	Journal	Journal	JE1674	Journal : Approved for ...	5/6/2025 5:27 am
46,511	Journal	Journal	JE1674	Journal : Approved for ...	5/6/2025 5:27 am
46,511	Journal	Journal	JE1674	Journal : Approved for ...	5/6/2025 5:27 am
46,511	Journal	Journal	JE1674	Journal : Approved for ...	5/6/2025 5:27 am
46,511	Journal	Journal	JE1674	Journal : Approved for ...	5/6/2025 5:27 am
46,511	Journal	Journal	JE1674	Journal : Approved for ...	5/6/2025 5:27 am
46,510	Bill	VendBill	6456541	Bill : Open	5/6/2025 5:25 am
7,690	Sales Order	SalesOrd	SO83	Sales Order : Pending B...	4/25/2025 12:53 pm
22,143	Payment	CustPymt	PYMT121	Payment : Not Deposited	4/25/2025 10:07 am

Home

Viewing: Portlet date settings Personalize Layout

Personalize Dashboard

Standard Content

SuiteApps

Currently Used

Analytics Bank Reconciliatio... Calendar Custom Portlet Custom Search KPI Meter KPI Scorecard Key Performance In... List

Quick Add Quick Search RSS/Atom Feed Recent Records Reminders Report Snapshots SMT Links Search Form Settings

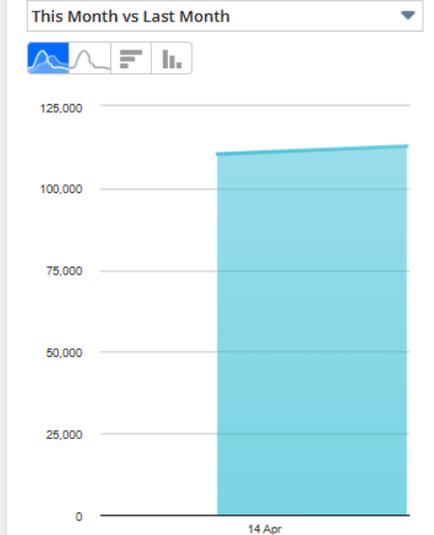
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Issue Management

A ticketing system helps streamline end user issues, expediate issue resolution, and track history of issues

Consider using NetSuite's Help Desk feature or an external ticketing system such as Zendesk, Freshdesk, Jira etc...

Enable Help Desk at Setup > Company > Enable Features > CRM > Support

Support

EMAIL CASE CAPTURE
HAVE CASES CREATED AUTOMATICALLY FROM EMAIL MESSAGES YOU RECEIVE.

AUTOMATED CASE ESCALATION
SET UP ESCALATION RULES AND AUTOMATICALLY ESCALATE SUPPORT CASES.

KNOWLEDGE BASE
CREATE A KNOWLEDGE BASE FOR FAQS, PUBLISHING SUPPORT CASES AND MORE.

HELP DESK
STREAMLINE YOUR IT AND INTERNAL SUPPORT.

Help Desk

- Help Desk checkbox added to case forms
- Help Desk cases are internal only
- Do not show on standard case reports
- Help Desk cases show in employee center
- Ability to set up inbound email to create Help Desk cases, ie. helpdesk@rmnsug.org
- Manage issues via email – automatically tracked on Help Desk cases

Customizing NetSuite Best Practices

1

• CUSTOM FIELDS

2

• CUSTOM LISTS

3

• CUSTOM FORMS

4

• CUSTOM RECORDS

Custom Fields

1

Entity Fields

Customers, Vendors, Employees etc. . .

2

Item Fields

Apply to item records

3

Transaction Body Fields

Sales Orders, Invoices, Bills etc...

4

Transaction Line Fields

Lines on transactions such as items or expenses

5

CRM Fields

Cases, tasks, events, phone calls etc...

6

Transaction Item Options

Item Number Fields

Other Record Fields

Custom Field Best Practices

Transaction Body Field

Save | Cancel | Change ID | Apply to Forms | Actions

LABEL *
Legacy Invoice Date

ID
custbody_legacy_invoice_date

INTERNAL ID
26248

OWNER
E261 Cory Anderson

DESCRIPTION
The date of the invoice from the legacy accounting system.

TYPE
Date

LIST/RECORD

STORE VALUE USE ENCRYPTED FORMAT

Applies To | **Display** | Validation & Defaulting | Sourcing & Filtering | Access | Translation | History

INSERT BEFORE
- Unchanged -

SUBTAB

DISPLAY TYPE
Normal

HELP
The date of the invoice from the legacy accounting system.

Save | Cancel | Change ID | Apply to Forms | Actions

Always create an ID based on the field name

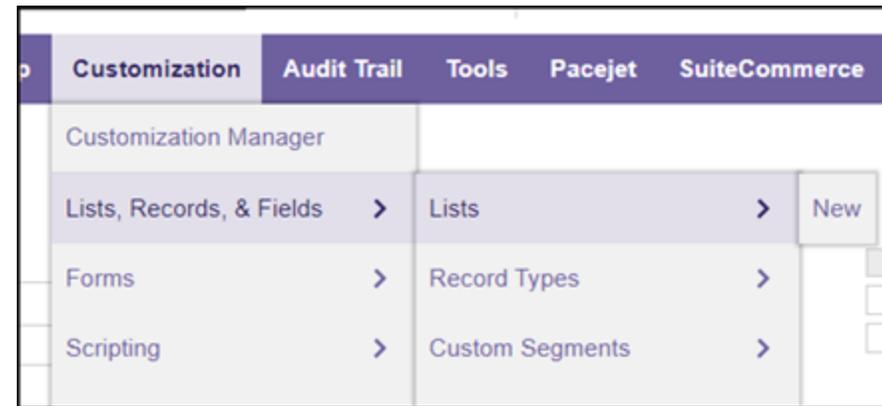
Add a description - what is the purpose of the field?

Choose an appropriate field type

Copy the description to the Help. Users see this when they click on field help.

Custom Lists

- Use to restrict custom fields to specific values
- Ensures data integrity and uniformity
- Can be used on almost all custom field types
- Allows you to use the values to trigger other actions such as workflows

A screenshot of the NetSuite Custom List configuration form. The form has a title 'Custom List' and buttons for 'Save', 'Cancel', and 'Reset'. The 'NAME' field is labeled 'Customer Type'. The 'ID' field contains the text '_customer_type'. The 'OWNER' field is set to 'Cory Anderson'. The 'DESCRIPTION' field contains the text 'Describes the customer type which determines how we do business with them'. Below the description is a 'Values' section with a 'Translation' tab. The 'VALUE' field contains a list of values: 'Wholesale', 'Retail', 'Independent Sales Rep', and 'Third Party'. At the bottom of the values list are buttons for 'Add', 'Cancel', 'Insert', and 'Remove'. The form also has 'Save', 'Cancel', and 'Reset' buttons at the very bottom.

Custom Forms

Entry Forms

Used for record types that not transactions such as items, customers, vendors, employees etc. . .

Transaction Forms

Used for all transaction record types such as Sales Orders, Invoices, Bills, Payments etc...

Custom Forms Best Practices

- Create custom forms for all your common record types
 - Start with the pre-built form, make a new version and customize
- Remove fields that are not used in your business processes
 - The goal should be to have clean, uncluttered information
- Naming convention should be consistent
 - i.e. ACME Sales Order, ACME Purchase Order, ACME Customer

Custom Transaction Forms

Submit

+ FILTERS

   SHOW INACTIVES

EDIT	INTERNAL ID	NAME
Customize	20	Standard Assembly Build
Edit	146	Primary Assembly Build
Edit	268	Primary WO Build
Edit	422	GB - Assembly Build
Customize	21	Standard Assembly Unbuild
Edit	270	Primary Assembly Unbuild
Edit	423	GB - Assembly Unbuild
Customize	50	Standard Vendor Bill
Edit	288	Primary Vendor Bill + Amortization
Edit	385	Primary Vendor Bill
Edit	386	Primary Vendor Bill + Landed Cost

Custom Records

Custom Records allow you to collect and track information in your account. They are used to bridge any gaps that NetSuite might have to help you with your specific business needs.

Rejection Record

Use on approval workflows

Customer Surveys

Store survey info and attach to customer record

Approval History

Capture record approval details

Custom Records Best Practices

- Enter custom Internal ID
 - Example - _rejection_record
- Enter a Description
- Uncheck 'Include Name Field'
 - This field is required on new records when enabled
- Check 'Show ID'
 - This ensures that the unique system assigned ID number is visible and searchable
- Save, and then Edit to add fields

Custom Record Type

Save ▼ Cancel Reset

NAME *
Rejection Record

ID
_rejection_record

ORIGINATING CUSTOM SEGMENT

OWNER
Cory Anderson

DESCRIPTION
This is used to log a rejection message in tandem with approval processes.

INCLUDE NAME FIELD
 SHOW ID

SHOW CREATION DATE ON RECORD ON LIST
SHOW LAST MODIFIED ON RECORD ON LIST

Subtabs Sublists Icon • Numbering • Permissions

Automating Day-to-Day Tasks

Workflows

Approvals

Save the effort of manually approving transactions. Set thresholds for auto-approval.

- Sales Orders
- Vendor Bills
- Journal Entry

Email Invoices

Save time by automatically emailing new invoices to customers at the end of each business day.

Lock Records

Prevent users from modifying approved transactions.

Sometimes this is required for other countries such as Germany.

Workflows

Block Stand Alone Records

Force users to create upstream transactions instead of going direct to a GL impacting transaction.

- Invoices
- Vendor Bills

HTML Notifications

Use to create highly visible notifications on any record type.

Example: a bright banner at the top of a customer record that has overdue invoices.

Bill Zero \$ POs

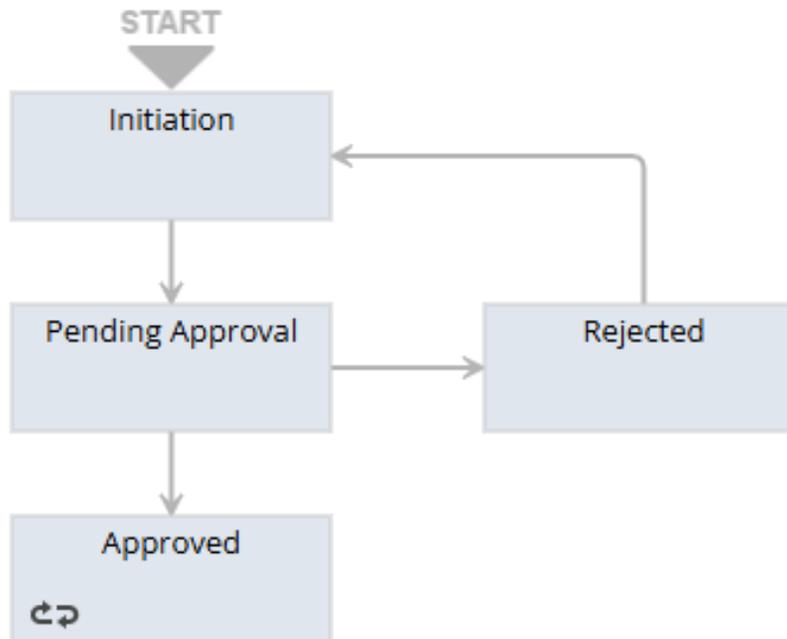
Sometimes transactions are created that are \$0, but need to be created for COGS.

- Purchase Orders
- Replacement Sales Orders

Workflow: Journal Entry Basic Approval

Workspace

+ New State



HTML Notifications Workflow

The screenshot displays a web interface for a Sales Order. At the top, a navigation bar includes icons for home, search, and refresh, along with menu items: Activities, SPS Commerce, SFTP, Contract Renewals, and Payments. The main header shows 'Sales Order' with a search icon. Below this, the order details are: 'SO106420 286159 Cory Anderson' and a 'PENDING APPROVAL' status badge. A row of action buttons includes 'Edit', 'Back', 'Approve', 'Cancel Order', 'Create Deposit', 'Print', 'Print Labels', 'Email', 'Show Activity', and 'Quo'. A section titled 'Primary Information' contains a yellow-highlighted comment: 'This comment comes from the customer record.' To the right of the comment are fields for MEMO, SUBSIDIARY, DEPARTMENT, CLASS, LOCATION, and AEM IC ORDER. Below these are fields for ORDER # (SO106420), SALESFORCE ORDER #, END USER (286159 Cory Anderson), BILL TO CUSTOMER (286159 Cory Anderson), DATE (04/15/2025), ORDER TYPE (4) (Contract - New), and CONTRACT TERM (12). On the far right, there are fields for PO # (#33627) and two checkboxes: 'AEM CREDIT HOLD' and 'AEM CUSTOMER SERVICE HOLD'.

Activities SPS Commerce SFTP Contract Renewals Payments

Sales Order

SO106420 286159 Cory Anderson **PENDING APPROVAL**

Edit Back Approve Cancel Order Create Deposit Print Print Labels Email Show Activity Quo

Primary Information

This comment comes from the customer record.

MEMO

SUBSIDIARY

DEPARTMENT

CLASS

LOCATION

AEM IC ORDER

ORDER #
SO106420

SALESFORCE ORDER #

END USER
286159 Cory Anderson

BILL TO CUSTOMER
286159 Cory Anderson

DATE
04/15/2025

ORDER TYPE (4)
Contract - New

CONTRACT TERM
12

PO #
#33627

AEM CREDIT HOLD

AEM CUSTOMER SERVICE HOLD

Billing Operations

- Create billing schedules that automatically invoice eligible Sales Orders
- Precise control over what gets billed via saved searches
- Run once a day, or once every 6 hours.
- Create multiple schedules based on business requirements
- Native NetSuite functionality –available in all accounts

Billing Operation Schedule

Edit Back Run Now Actions

Primary Information

NAME: Daily Invoicing INACTIVE

DESCRIPTION:

Schedule

RECURRENCE FREQUENCY: Hourly

REPEAT EVERY: 6

NEXT DATE: 04/30/2025

NEXT TIME: 12:00 pm (GMT-08:00) Pa

LAST EXECUTED: 04/30/2025 6:00 am (GMT-08:00) Pa

This will run on 04/30/2025

NEXT BILL RUN AS OF DATE: 04/30/2025

Billing Operation Options

BILL RUN BILL RUN (OFF-CYCLE TR

Customer

LEGAL ENTITY: ALL CUSTOMERS

▼ **Billing Operation Options**

BILL RUN BILL RUN (OFF-CYCLE TRANSACTIONS)

▼ **Customer**

LEGAL ENTITY ALL CUSTOMERS

CUSTOMER/GROUP

Submission Details Billing Operations

Billables

- EXPENSES
- ITEMS
- SALES ORDERS

SALES ORDER SAVED SEARCH
[Sales Orders to Invoice \[billing operations\]](#)

Accounting

CREDIT CARD APPROVED

Communication

TO BE PRINTED
No

TO BE EMAILED
No

TO BE FAXED
No

Saved Search Notifications

OWNER
Kathryn Glass

PUBLIC
 AVAILABLE AS LIST VIEW

Criteria Results Highlighting Available Filters Audience Roles **Email** Audit Trail Exe

SEND EMAIL ALERTS WHEN RECORDS ARE CREATED/UPDATED
 SEND EMAILS ACCORDING TO SCHEDULE SUMMARIZE SCHEDULED EMAILS SEND IF NO RESULTS

Specific Recipients Recipients from Results Updated Fields Customize Message • Schedule •
Add recipients here for alerts and/or scheduled emails, if you know them in advance. If you define a filter such as "Sales Rep is Mine" on the C

ALLOW USERS TO SUBSCRIBE

RECIPIENT *
Cory Anderson

Add Cancel Insert Remove

Save | | Actions



Sticky Notes (free bundle)

 Sales Order

SO106420 286159 Cory Anderson PENDING APPROVAL

Edit Back | Approve Cancel Order Create Deposit Print Print Labels Email Show Activity Quote

▼ Primary Information

This comment comes from the customer record

ORDER #
SO106420

SALESFORCE ORDER #

END USER
286159 Cory Anderson

BILL TO CUSTOMER
286159 Cory Anderson

DATE
04/15/2025

ORDER TYPE (4)
Contract - New

CONTRACT TERM

MEMO

SUBSIDIARY

DEPARTMENT

CLASS

LOCATION

AEM IC ORDER

PO #
#33627

AEM CREDIT HOLD

04/30/2025 8:33 am
To: Cory Anderson
This is a sticky note on a
Sales Order. Sticky
- E261 Cory Anderson



File Drag and Drop (free bundle)

The screenshot shows a software interface with a navigation bar at the top containing a left arrow, a right arrow, and the text "List Search Customize". Below the navigation bar is a dashed box containing a folder icon and the text "Drop files here. Click for more options." Below this is a horizontal bar with a gradient from light orange to dark orange. At the bottom, a table shows "SUBTOTAL" with a value of "676.00" and "TRANSACTION DISCOUNT".

← → List Search Customize

Drop files here. Click for more options.

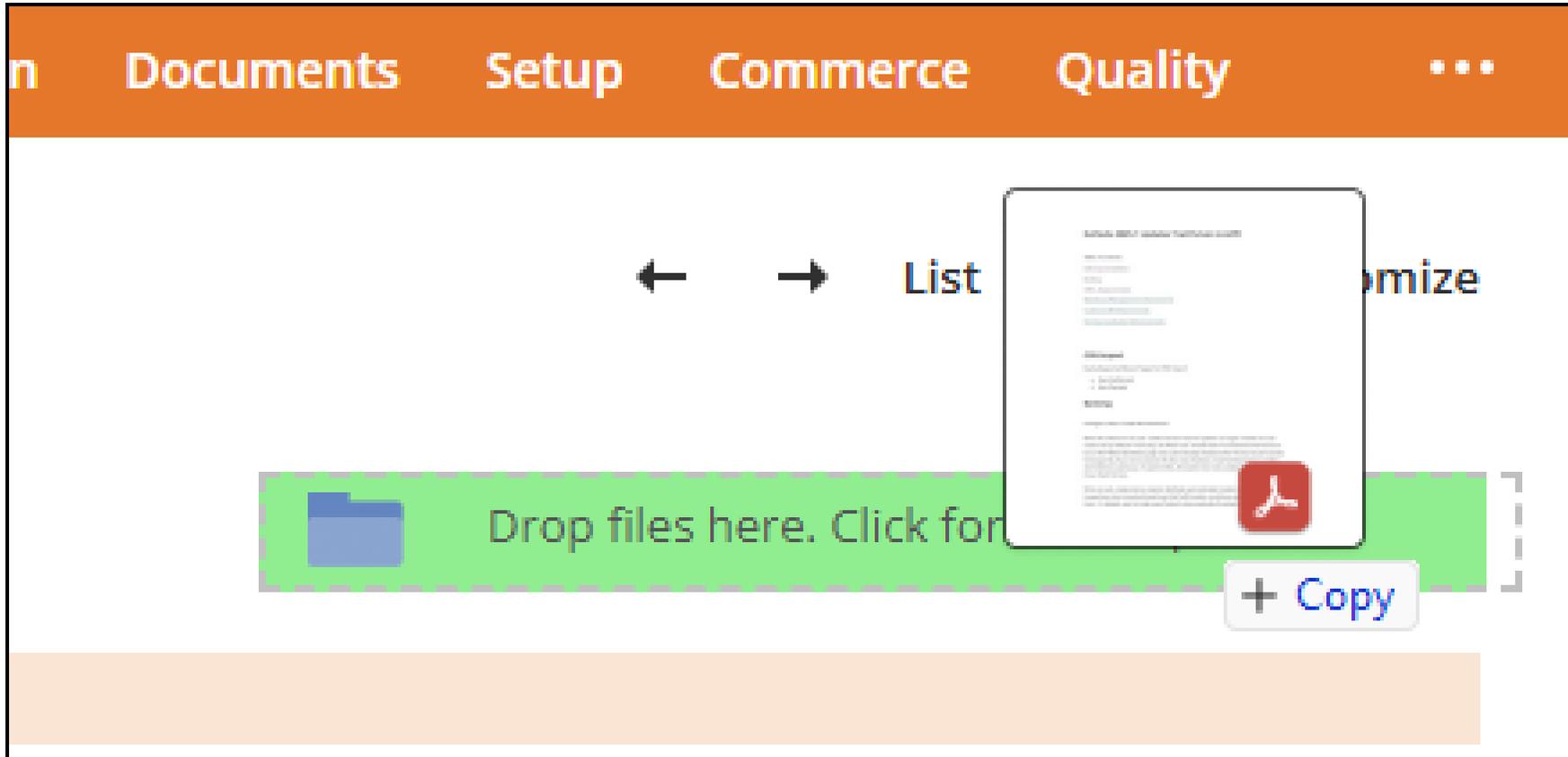
File Drag and Drop
Launch the File Drag and Drop Tutorial to learn more about the feature.

[Launch Tutorial](#) [Close](#)

Don't show this message again

SUBTOTAL	676.00
TRANSACTION DISCOUNT	

File Drag and Drop (free bundle)



Subsidiary Navigator (free SuiteApp)

Search

Help Feedback Cory Anderson
Stairway for Financials GB US v2024.2 04.02

Lists Reports Analytics Documents Setup Customization Commerce Fixed Assets Budgets Guided Selling Administration and Controls Compliance 360 Suite

Change Subsidiary Viewing: Portlet date settings Personalize

Subsidiary Navigator

Settings Help

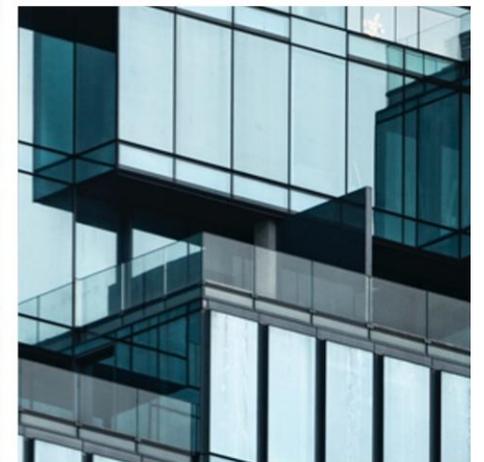
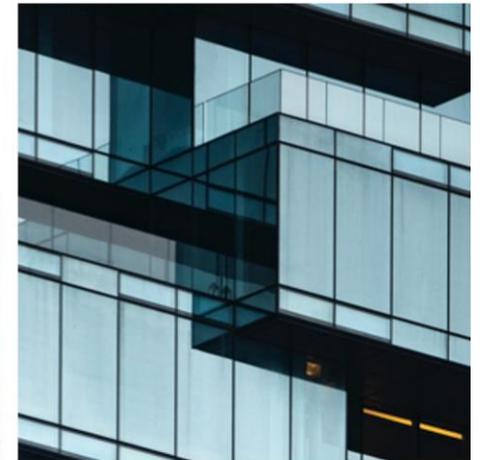
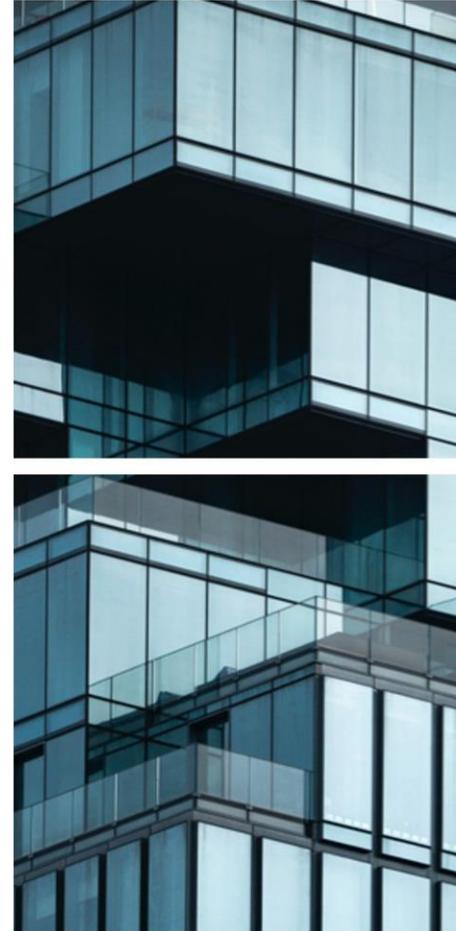
- P Parent
 - A Australia
 - C Canada
 - UK United Kingdom
 - USE United States - East
 - USW United States - West
 - X xELIMINATIONS

New Release

Key Performance Indicators

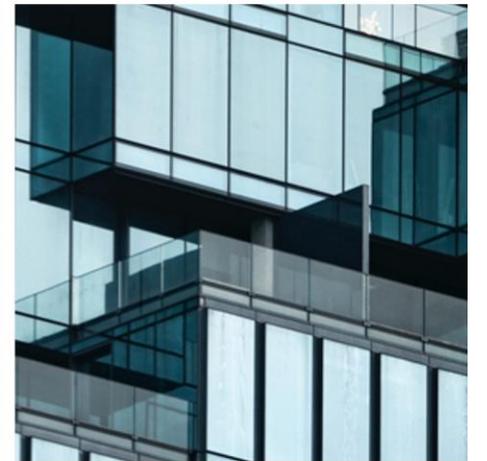
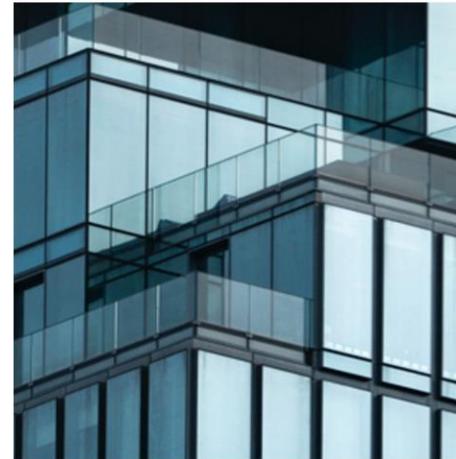
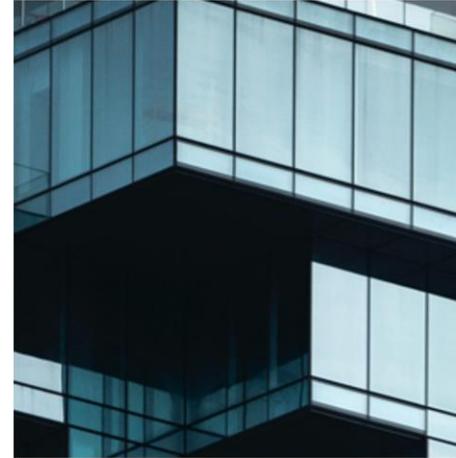
Closing Thoughts

- Follow NetSuite's intended processes. Creating customizations to fit “they way we've always done it” does not always end well.
- Teach them to fish.
- Consider hiring fractional NetSuite Administration
- Read the release notes



Closing Thoughts

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Q&A

Netgain **Accounting**
SUMMIT 25

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Thank you

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Scan the QR code to share your thoughts on the session

