Agenda for July 15th

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- **Browser Extensions**
  Mark Tanner, ONSUG Co-Chair; Director of MIS, Danby Appliances
- **Presentation by our meeting sponsor:**
  Allison Sobel, NetSuite National Sales, Versapay
- **How to Look for New Add-Ons**
  Durrell Martin, ONSUG Webmaster; Corporate Director of Technology, CTM Media Group
- **Netsuite Support Suite App**
  Durrell Martin, ONSUG Webmaster; Corporate Director of Technology, CTM Media Group
- **Customizing the Basics to Your Business Needs: Beginner to Advanced Native NetSuite Dashboards**
  Mark Tanner, ONSUG Co-Chair; Director of MIS, Danby Appliances
- **Client Spotlight – Customized Reports**
  Stephanie Frisina, ONSUG Speaker Chair; Managing Director, FUSE Health
- **Next Meeting**

Browser Extensions

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- Focus on Google Chrome and Microsoft Edge (Chromium)
- Edge can load extensions from the Chrome web store
  - demo

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- NetSuite Show Field IDs
  - Hover over the field label to show the Field ID
  - SHIFT + LEFT-CLICK to copy the Field ID
  - SHIFT + CTRL, enter the Field ID to find the label

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- NetSuite Advanced Field Help
  - Click on the field label to show more information (Edit mode will show more information)
  - Click on the Field ID to open the custom field (if applicable)
  - Example: DAC100B5WDB
    - Actual Stackable Quantity
    - Stackable QTY by Formula
    - Item Status (dropdown list)
  - Example: SO
    - Example: SO526400
    - Update the Order Validation Notes (inline field)

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- NetSuite Portlet Refresher
  - Refreshes your Home Dashboard each time you go to it
- NetSuite Keyboard Shortcuts
  - Use or create simple 3-letter combos to go directly to a page

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- NetSuite XML
  - Adds “&xml=t” to the url automatically
- NetSuite Field Explorer
  - Better than the XML view, shows some fields not found in the XML view

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- NetSuite Environment Switcher
  - Used to open the same record from Production to SB

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BEWARE

NetSuite Bundles to Update

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For Developers

- NetSuite Search Export -> Edit Saved Search, click Export as Script
- NetSuite Scripted Records
- NetSuite Record JSON Viewer

Sponsor Presentation

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How to Look for Add-Ons

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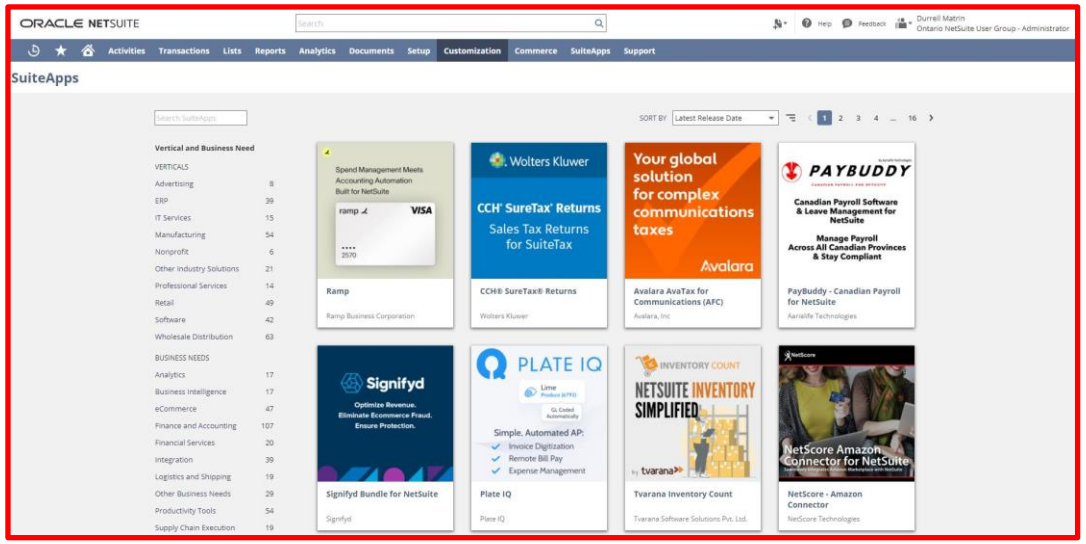
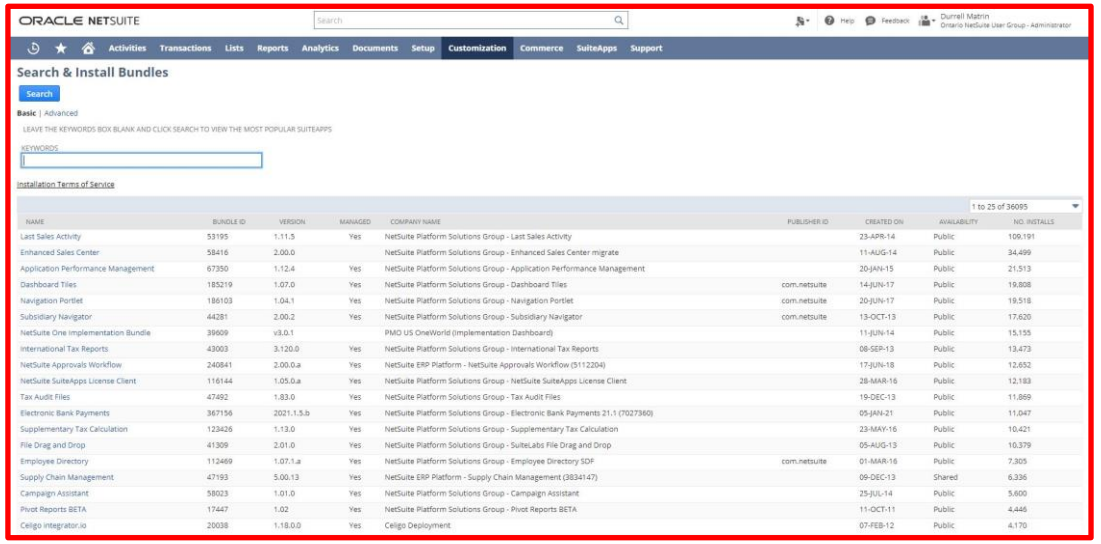
Suite Apps vs Bundles





How to Look for Add-Ons

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Popular Free SuiteApps

- File Drag and Drop

Adds the ability to drag and drop any Netsuite compatible files to any record, including custom ones.

- Application Performance Management (APM)

APM was released in 2019 to help tackle the age-old complaint that NetSuite is running “slow”.

- Dashboard Tiles

Dashboard Tiles lets you create a dashboard with tiles that display your business-critical KPIs in a bold visual layout with images and blinking alerts.

- Subsidiary Navigator

Subsidiary Navigator gives you an interactable custom portlet on your NetSuite Dashboard that shows you your subsidiary structure in a roll-up.

- Sticky Notes

Sticky Notes lets you put virtual Post-It Notes on any NetSuite record or field on a NetSuite Record.

How to Look for Add-Ons

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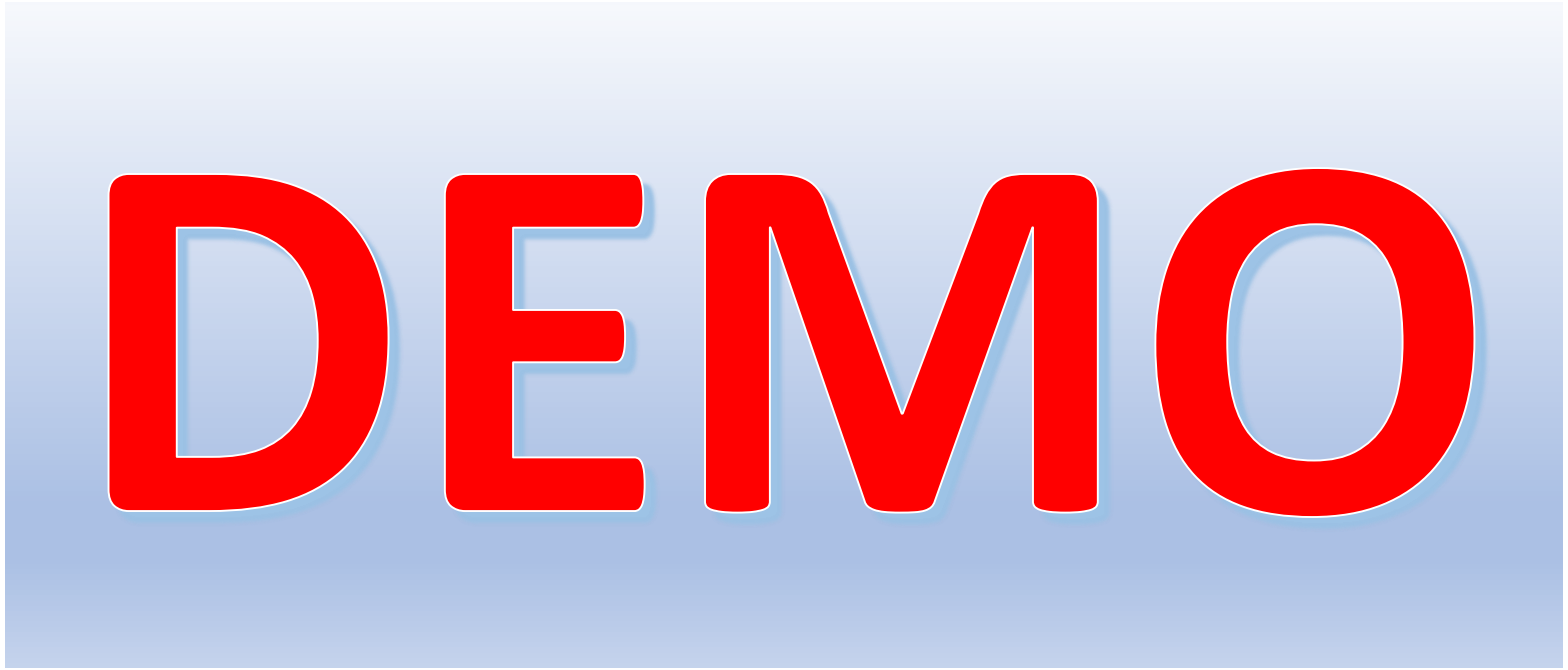

NetSuite Support Assistant

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Installing the NetSuite Support Assistant

The following steps can be completed by a NetSuite Administrator.

To install the NetSuite Support Assistant:

1. Log in to the account where you want to install the NetSuite Support Assistant bundle.
2. Go to Customization > SuiteBundler > Search & Install Bundles.
3. Search for the bundle **NetSuite Support Assistant**.
4. Open the NetSuite Support Assistant bundle and review the Components tab.
5. Click the **Install Bundle** button to begin the installation process.

NetSuite Support Assistant

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Setting Up the NetSuite Support Assistant

After the NetSuite Support Assistant is installed, you can add it to your dashboard as a portlet.

To add the NetSuite Support Assistant portlet to your 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.
2. Click the **Custom Portlet** icon on the **Personalize Dashboard** palette.
3. Click the **Set-Up** link in the portlet or the portlet menu, select NetSuite Support Assistant portlet from the **Source list**, and click **Save**.

NetSuite Support Assistant

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Using the NetSuite Support Assistant

The NetSuite support Assistant is able to provide answers from SuiteAnswers based on your queries, and high-level answers related to the specific NetSuite product area.

Sample Queries

- You can ask the Support Assistant about performing tasks in your account. The Support Assistant will then navigate you directly to the relevant page in NetSuite.
- “Show me my customers.”
- “I want to create a saved search.”
- “I want to add a new employee.”
- When you ask a question about NetSuite, the Support Assistant will send you links to relevant topics in SuiteAnswers.
- “What is SuiteCommerce?”
- How can I create a SuiteBundle?”

NetSuite Support Assistant

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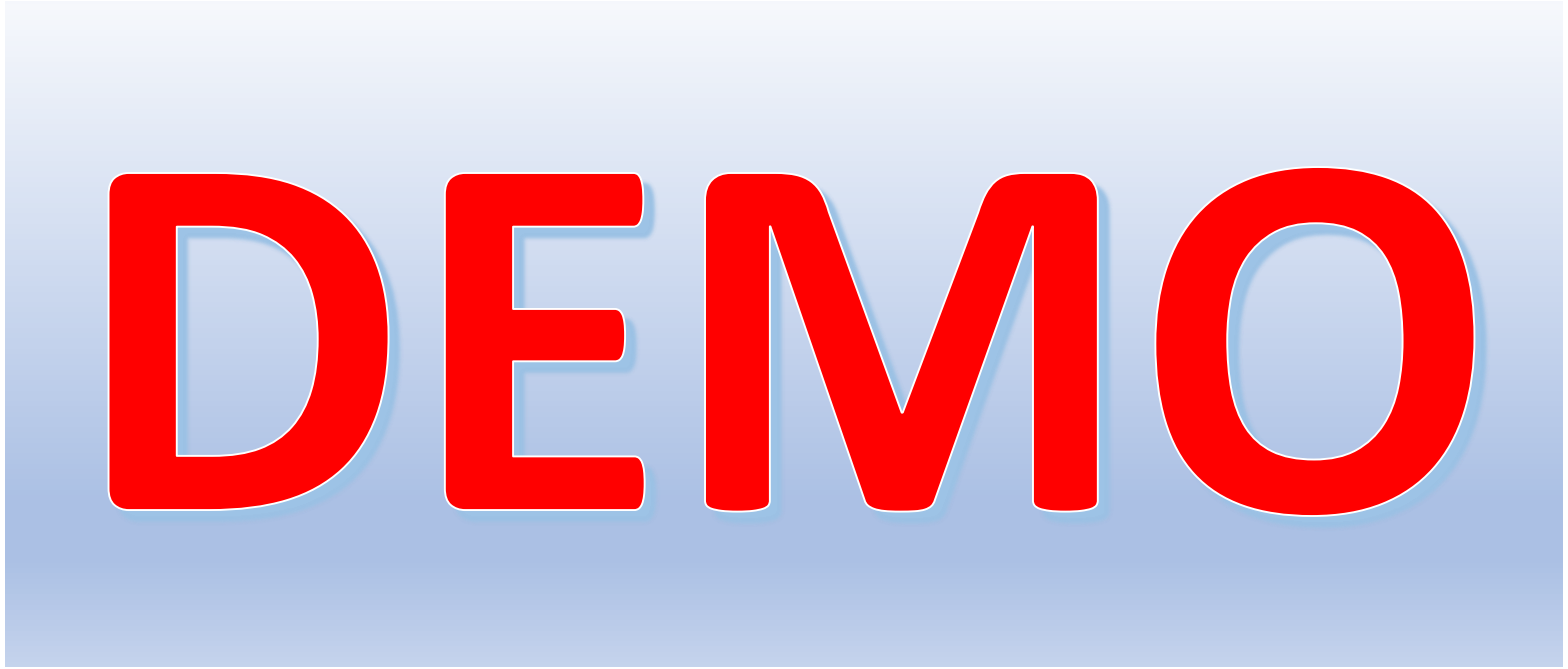

Save-the-Date: Next Meeting

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