

Winter Meeting - February 22, 2024



In-person and Online!
9am start time

WIFI Access

Clear-Guest

Username: 92147

Password: !rD6



Agenda for February 22, 2022

- | | |
|----------------------|---|
| 9:00 – 9:15 | Welcome
Presented by: Brandon Peneycad |
| 9:15 – 10:10 | Customizing NetSuite
Presentation by: Mark Tanner, ONSUG Co-Chair |
| 10:10 – 10:20 | Break |
| 10:20 – 11:00 | Best Practices and New Ideas
Presentation by: Mark Tanner, ONSUG Co-Chair |
| 11:00 – 11:10 | NetSuite Ideas to vote on
Presentation by: Lisa Reed, ONSUG Treasurer |
| 11:10 – 11:30 | Ask us anything
Discussion lead by: Gavin Davidson, ONSUG Co-Chair |
| 11:30 | Wrap-up |



Board Members

Mark Tanner, Co-Chair

Gavin Davidson, Co-Chair

Lisa Reed, Treasurer

Brandon Peneycad, Co-Membership Chair

Stephanie Frisina, Co-Membership Chair

Barb Blundon, Co-Membership Chair

Darcie Vany, Recording Secretary

Rajneesh Kumar, Co-Webmaster / Tech Adviser

Paul Stanchev, Speaker Chair

Durrell Martin, Co-Webmaster / Tech Adviser

Announcements

- Lunch Box series (monthly)
 - Next session March 7th
- Increase LinkedIn activity – join the chat!
- ONSUG.ORG web site – no login restrictions
- 2024.1 release is “almost” here!



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Customizing NetSuite

Some key General Preferences

Setup -> General Preferences

- Password Policy

- Delay Loading of Sublists

- Number of Rows in List Segments / Dropdowns

- Overriding Preferences

- Centers -> log out pages

- Custom Preferences (used in Scripts)

Setup -> Company -> Company Information

Setup -> Roles

- Custom Roles – get specific

- Centre Types

Customizing NetSuite

Publishing Dashboards to roles

Roles to be published must be part of the same Centre Type

Give permissions to Publish Dashboards to a role

Employee -> Global Permissions -> Publish Dashboards (Full)

Lock Shortcuts / Lock New Bar

Apply to Roles

Override existing -> set to NO for only new users

Apply to Tabs -> show different Dashboards

Locked - Unlocked - Add/Move content

Customizing NetSuite

Creating Menu Options for all users (example a Menu of Saved Searches grouped by Department)

Customization -> Centers and Tabs -> Center Tabs -> New

Customization -> Center Categories -> New

Centre = Classic

Customization -> Center Links

Note: haven't been able to order the Center Tabs



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Best Practices and New Ideas

Naming saved searches

Purpose, Initials, any “call-outs” for it’s use

Gold Net Sales Reporting

MT – Open Order Report ** Scheduled **

MT – All Employees ** SuperSync **

MT – Contacts Email list ** SyncApps **

APPF – Invoices to be Emailed ** Script **

“List my Saved Searches” search

“Find unused Saved Searches”

Co-Pilot “netsuite create a saved search to find saved searches not run in the last year”

Best Practices and New Ideas

Employee Onboarding and Offboarding automated notifications

Initiated through a SharePoint [Form](#) with Power Automate (send to HR, create a Zendesk ticket)

Automated Saved Search for New Employees created in NetSuite

Map/Reduce [Script](#) sends the Saved Search contents on a schedule

Best Practices and New Ideas

Track Employee assets (Hardware, Software, Licenses) in a non-Financial record

IT Assets (custom record)

Asset "Name" (unique system id)

Type (Laptop, PC, Monitor)

Employee assignment

Status (Deployed, Ready to Deploy, Unconfigured, Decommissioned)

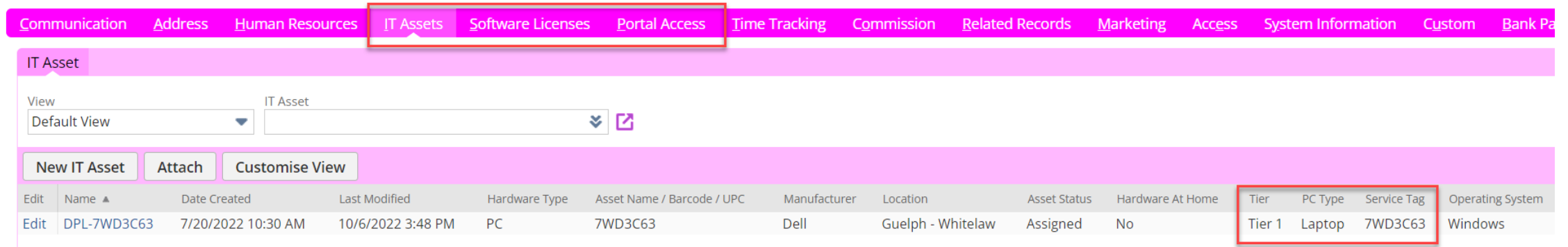
Sublist added to the Employee record

Saved Searches on Status (ie how many systems we have ready to deploy)

Also tracking:

Software Licenses

Portal Access



Edit	Name ▲	Date Created	Last Modified	Hardware Type	Asset Name / Barcode / UPC	Manufacturer	Location	Asset Status	Hardware At Home	Tier	PC Type	Service Tag	Operating System
Edit	DPL-7WD3C63	7/20/2022 10:30 AM	10/6/2022 3:48 PM	PC	7WD3C63	Dell	Guelph - Whitelaw	Assigned	No	Tier 1	Laptop	7WD3C63	Windows

Best Practices and New Ideas

When an employee leaves ...

Remove Access immediately, strive to make them Inactive

Saved Searches / Reports
Offboard reporting ownership

Scripts / Workflows
Assign ownership to another developer/admin
Main reason is error communication

Script

[Edit](#) [Execute](#) [Back](#) [Deploy Script](#) [Actions](#) ▾

Type
Map/Reduce
Name
Danby | Dynamic Email Group MR
ID
customscript_danby_dyn_email_mr
API Version
2.0

[Scripts](#) [Parameters](#) [Unhandled Errors](#) [Execution Log](#) [Deployments](#) [System Notes](#)

Notify Script Owner
 Notify All Admins
Notify Group
Notify Emails

Best Practices and New Ideas

Links to training, work instructions, support documentation

Example: CRM Task creation



Save Cancel

Learn more about Task Management [here](#)

Primary Information

Title *

Task Type *

Company *

Sales Rep

Custom CRM Field

Save & Edit View Cancel Change ID Apply to Forms Actions

Label *

ID
custevent_danby_link_to_training

Internal ID
16229

Owner

Description Mirror to Help

Type

List/Record

Store Value Use Encrypted Format

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

Mandatory
 Check Spelling

```
Default Value  
<span style="background-color: yellow;">  
<font size="3">Learn more about Task  
Management <a  
href="https://danby.sharepoint.com/sites/  
DanbyUniversity/SitePages/TaskManagementi  
nNetSuite.aspx" target="_blank">here</a>  
</font></span>
```

Best Practices and New Ideas

Co-Pilot – Protected environment -> <https://copilot.microsoft.com/>

- Eligibility extends to individual and business Microsoft 365 license holders, including E3, E5, A3, A5 (faculty only), F3, Business Standard, and Business Premium.
- This means that user and organizational data are protected, prompts and responses are not saved, Microsoft has no eyes-on access, and chat data isn't used to train the underlying large language models.

Workflow logging – only while testing

After Submit actions – avoid them!

Finding Gaps

“Missing emailed Invoiced”

“Inactive employees assigned to a Customer”

“Inactive Product Manager assigned to Items”



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Wrap-up

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- Stay and let's network
- Survey for your input