

Assignment

1. Login to NetSuite
2. Check your Employee record
 - a. See what role you have been assigned
 - b. Edit the employee record and change your Job Title
 - c. Expand the entire record
 - d. Search for 'Give Access' and make sure it is checked
Note: It will be check because otherwise you wouldn't be able to login to begin with.
 - e. Minimize the sublists to be able to see them in normal tab view
3. Go to the 'Import CSV' by navigating into the 'Setup' Tab
 - a. No need to do anything here for this assignment
 - b. Now select the 'Recents' button and go back to your employee record
4. For the purposes of this assignment, you have found that you often go to your employee record. If you end up going to the same record with your position, it is a good idea to add a 'Shortcut'
 - a. Add your employee record in 'View' (not edit) to your shortcuts
Hint: If you are in edit, just click 'Save' or 'Cancel' to get to view
5. Use the Search Bar to get to inventory items
Hint: Inventory Items and Non-Inventory Items are just listed under 'Items'
6. Navigate to the following tabs to get familiar with common tools used in the rest of this course.
 - a. Enter Sales Order (Transactions>Enter Sales Orders>List)
 - b. Dashboard (Home>Dashboard)
 - c. Preferences (Home>Set Preferences)
 - d. Items (Lists>Accounting>Items)
 - e. Saved Reports (Reports>Saved Reports>All Saved Reports)
 - f. Saved Search (Reports>Saved Searches>All Saved Searches)
 - g. File Cabinet (Documents>Files>File Cabinet)
 - h. SuiteCommerce Configuration (Setup>SuiteCommerce>Configuration)
Hint: This won't exist if you don't have a SuiteCommerce bundle
 - i. Company Info (Setup>Company>Company Information)
 - j. Enable Features (Setup>Company>Enable Features)
 - k. Workflows (Customization>Workflow>Workflows)
 - l. Item Fields (Customization>Lists, Records, & Fields> Item Fields)
 - m. SuiteBundler (Customization>SuiteBundler>Bundle Audit Trail)
 - n. Scripts (Customization>Scripting>Scripts)

Lecture Notes

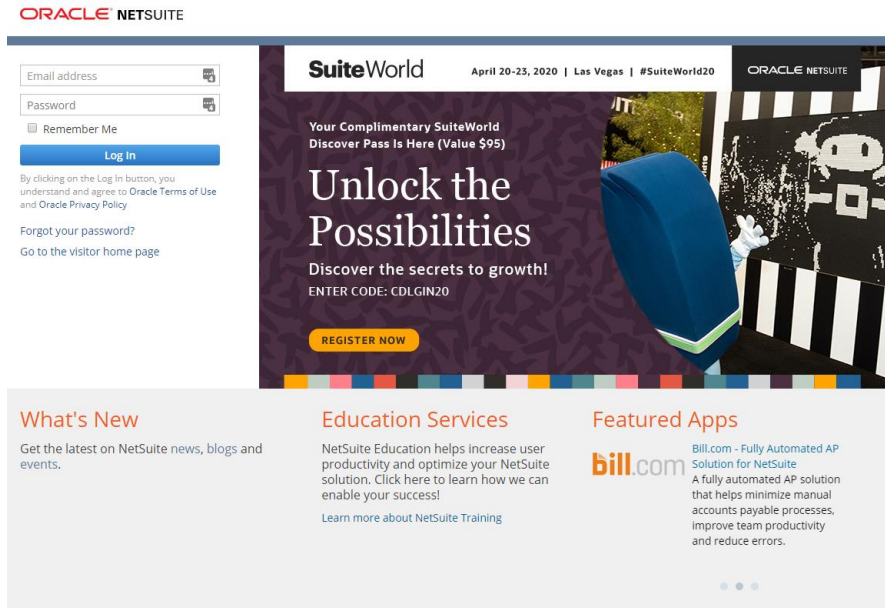


Figure 1: Customer Login Portal. Click on Image for Link

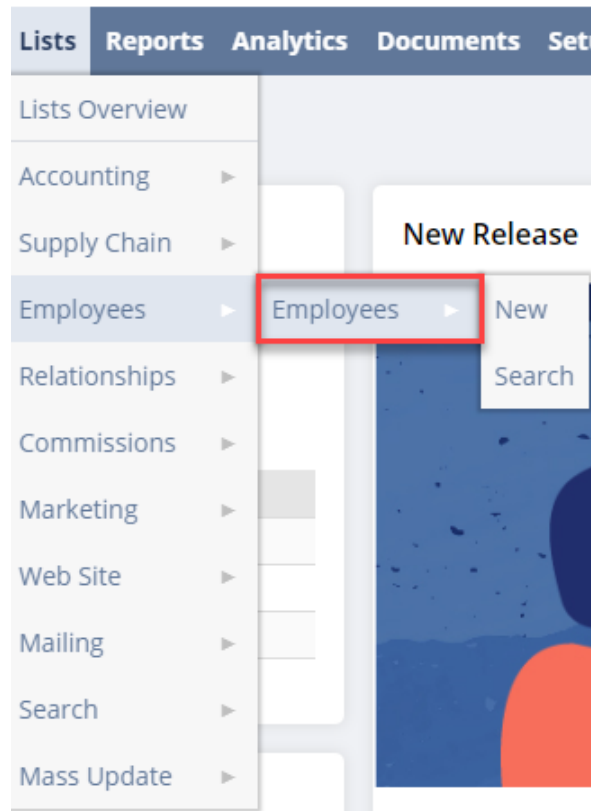


Figure 2: Employee Record

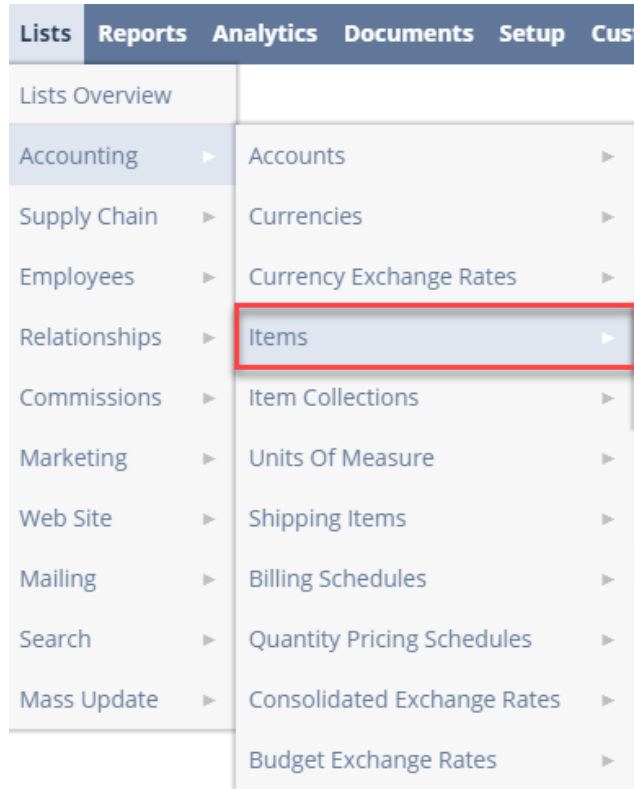


Figure 3: Items like Inventory and Non-Inventory

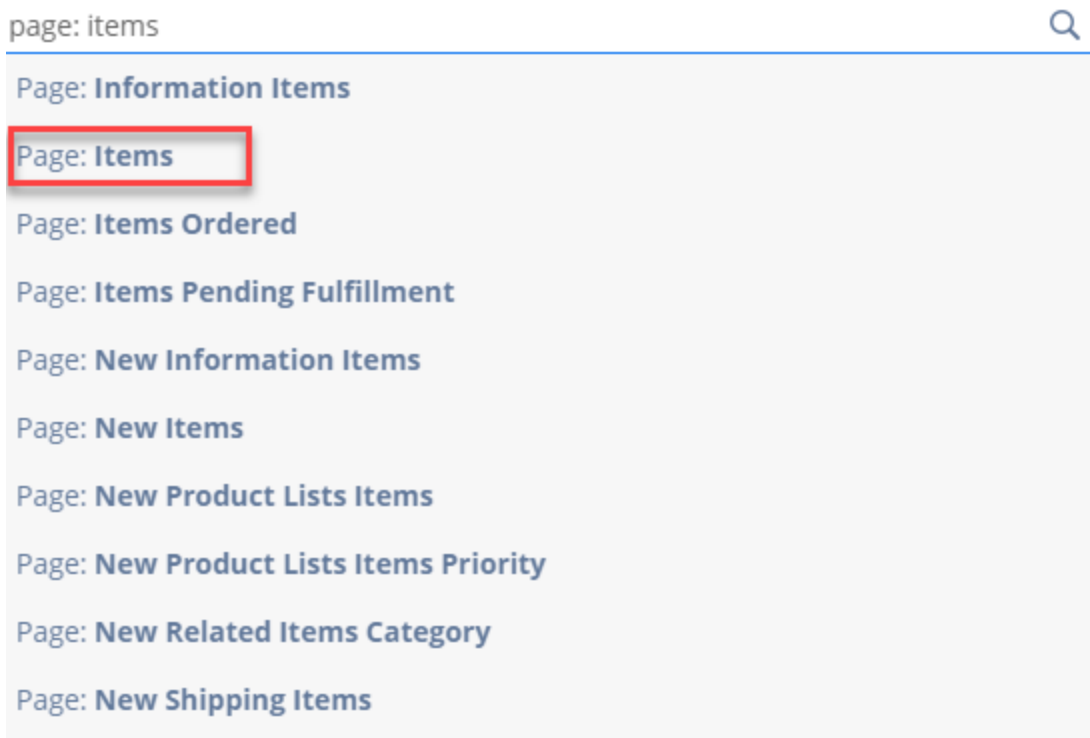


Figure 4: Search Bar