Getting to Know

NetSuite

NETSUITE™

Getting to Know NetSuite

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Chapter 1 Welcome!

NetSuite

Welcome to NetSuite, a revolutionary way to run your business. NetSuite combines all the features your company needs in a single system.

With NetSuite, you and your team can manage your company's business from anywhere, at any time with unprecedented ease of use and security. All you need is a computer with a browser and an Internet connection.

NetSuite offers total security and flexibility. Your business data is protected by the most current and advanced security measures available. Rather than worrying about the safety of your information, you can concentrate on managing your business.

You can customize NetSuite to solve problems unique to your business. Create custom records and forms, and create a Home page that gives you an immediate update of your company's success as soon as you log in to your account.

You can also import data from your previous accounting software and your previous contact management applications. NetSuite can also synchronize with other contact, calendar and task management devices and software.

Your Free Trial

Your Free Trial is a chance to experience how NetSuite can change the way you do business.

Wolfe Electronics is a fictional retail business created to show NetSuite's comprehensive features. Your Free Trial is fully functional, and you can simulate any processes or transactions that your business uses. Test the capabilities of customization and see for yourself how a single comprehensive and seamlessly integrated system can make your job easier.

In This Guide

The purpose of this guide is to orient you to NetSuite and to get you started using its features.

In *Getting to Know NetSuite,* you will find these chapters:

- **Welcome -** An overview of this guide.
- **Orientation -** This chapter explains the layout of NetSuite, how to control access to your account through the assignment of roles and how to get answers to your questions.
- **Customization** - This chapter gives an overview of how to make your suite work for you, the CEO. Learn a variety of tips that make using NetSuite even easier.
- **Test Driving Wolfe Electronics** - After you become acquainted with NetSuite, you can use our detailed sample exercises to experience the integration and ease of use.

Using This Guide

The rest of this chapter will help orient you as you become acquainted with your basic CRM applications in NetSuite.

Vocabulary

This section will introduce you to vocabulary used in this guide and in NetSuite's online help.

You may see a step worded:

1. Click Home > Customize Page.

"Click Home > Customize Page" means "Click the Home tab, and then click Customize Page on the Home page."

The terms "tab" and "subtab" are also used.

- Tabs are the links that are always visible toward the top of the page. When you log in as the administrator, you see six tabs at the top of every page. Those tabs are Home, Transactions, Reports, Lists, Support and Setup.
- Subtabs are tabs that appear within the body of some pages.

  The term "subtab" is also used to refer to tabs beneath other subtabs. In the example below, you see the Earnings subtab when you click the Payroll subtab on an employee record.

In the image below, you can see tabs and subtabs.

Symbols

The following symbols are used throughout this guide:

This symbol points out helpful tips you may want to use to save time.

An example of a tip:

"Most features are turned on by default. Keeping unused features turned off removes unnecessary links from your working pages."

This symbol indicates something that you need to know about when using NetSuite.

An example of a note:

"Portlets are areas of a page set apart from the rest of the page. When you log in to NetSuite for the first time, the Calendar, Events, and Snapshots portlets are at the top of the screen. If you scroll down the Home page you see other portlets with their titles in bold."

This symbol indicates technical information relating to hardware or software.

An example of technical information:

"To print checks, you need Adobe® Acrobat® Reader. It is recommended that you use version 5.0. You can download Adobe Acrobat Reader at Adobe's Web site at:

http://www.adobe.com/products/acrobat/readstep2.html.

Chapter 2 Orientation

In This Chapter

Before you begin using NetSuite, there is some information that can familarize you with the layout and organization of the system.

First, you will learn how the site is organized and how to navigate between pages. Then, you will learn how to control access to your company's data by assigning roles. Finally, there is a summary of NetSuite's online help system and information about customer support and other services.

Orientation

NetSuite is organized to make your job easier. Related tasks are grouped on the same pages offering an interface that is efficient and easy to use.

Tabs

NetSuite is organized by the series of tabs that appear at the top of each page. Each tab groups related links onto a single page.

Each person who uses NetSuite has access to different tabs, depending on that person's role in your company.

To navigate to a page, click the tab.

For more information on roles, see “Roles” on page 14

For more information on centers, see “Centers” on page 16

Navigating NetSuite

Because you access NetSuite in a Web browser, navigating the system is similar to navigating other Web pages. You can also bookmark pages that are used often.

There are also navigation tools NetSuite provides to make using the system easier, like shortcuts and breadcrumbs.

Shortcuts

The Shortcuts portlet on your Home page contains links to the pages you use most often. Clicking any link in the Shortcuts portlet takes you to the page.

You can create a shortcut to any page in NetSuite or another Web site by clicking the Add icon next to the Shortcuts portlet.

Portlets are areas of a page set apart from the rest of the page. When you log in to NetSuite for the first time, the Calendar, Events, and Snapshots portlets are at the top of the screen. If you scroll down the Home page, you see other portlets with their titles in bold.

Dropdown Menus

You can use dropdown menus to navigate quickly from tabs to pages in NetSuite. When you first log in to NetSuite, you can click on a tab to see the headings and links that appear on that page.

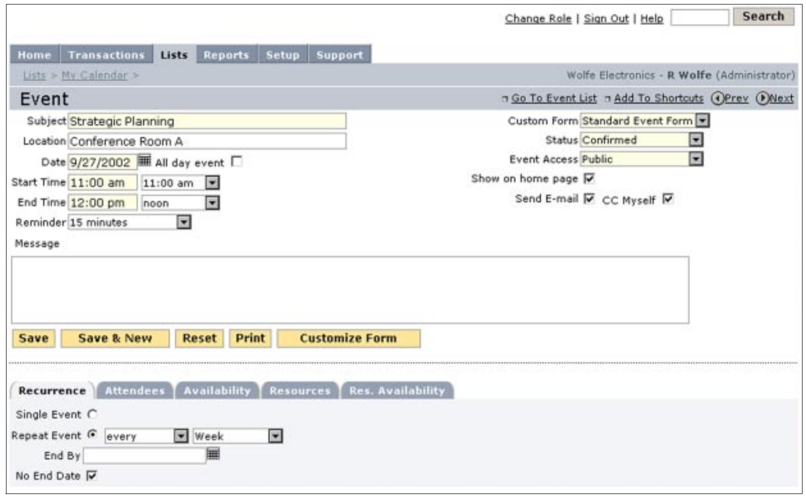
You can choose for dropdown menus to appear when you roll over tabs, when you click tabs or when you click an arrow next to the tab.

To choose the style of dropdown you want to use, go to Home > Set Preferences, and click the Appearance subtab. In the Dropdown Menus field, select the dropdown style you want to use, and click Save.

Breadcrumbs

Breadcrumbs are links that appear in the upper left hand corner of every page in NetSuite. When you navigate to pages within a tab, simply click a breadcrumb to return to one of the pages you previously visited.

In the image below, notice the breadcrumbs in the upper left corner.



Roles

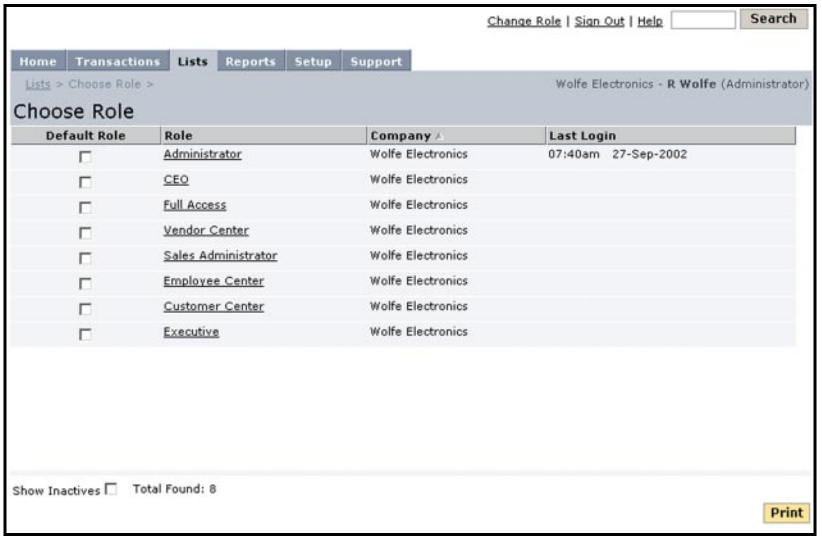
A role is a set of permissions that lets customers, vendors, employees and partners access specific areas of your data. You assign roles on customer, vendor, partner and employee records.

Assigning roles lets you control access to your company's data. Different roles have access to different tabs and links depending on job responsibilities or relationship with your company.

A sales person, for example, can access the Sales Center, which includes only those features that relate to reporting and processing sales. Partners, for example, can view reports related to the business they create.

When you first log in to NetSuite, you arrive at the Choose Roles page. All of your roles are listed, and you can click any link to log in as that role.

The image below shows the Choose Role page you will use during your Free Trial.



You can change to a role you have been assigned by clicking the Choose Role link in the upper right corner of any page.

Assigning Roles

Roles are assigned on the Access subtab of customer, vendor, partner and employee records.

Employees and vendors may have more than one role. Wolfe Electronics might assign the executive role to the company's sales manager, if that person also serves on the executive team. In the Free Trial, you can try eleven different roles.

To change between different roles, click Change Role in the upper right corner of any page.

NetSuite provides a list of standard roles to choose from. You can see a list of standard roles at Setup > Manage Roles.

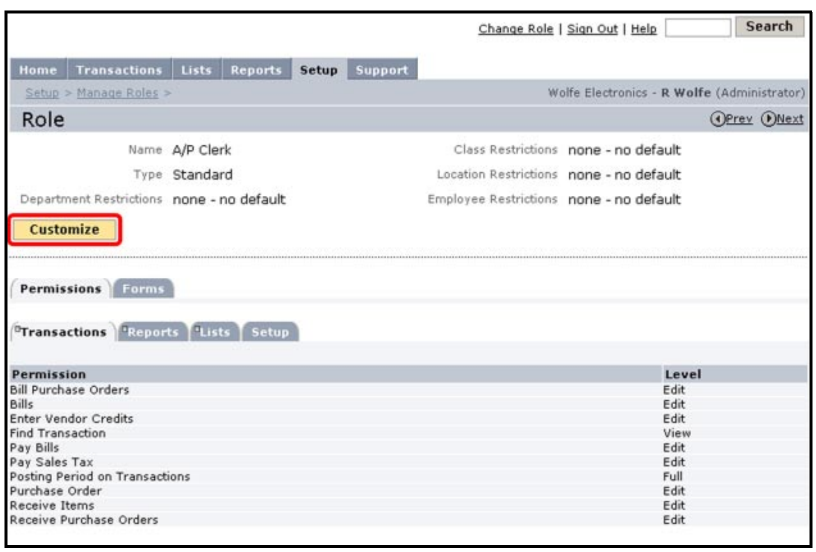
The administrator role is designed to set up and maintain your company's NetSuite account. The person who signs up for your account is assigned the administrator role. The administrator has complete access to every tab and link, including the Setup tab.

Customizing Roles

You can customize any standard role to suit the needs of your business. You customize a role by adding permission to or removing permission from a standard role.

Wolfe Electronics has created a custom role called Executive. Wolfe's executives have access to all standard reports and a small number of transactions.

To customize a standard role, an administrator can go to Setup > Manage Roles. Click the name of the standard role you want to change, and click the Customize button.



Centers

NetSuite offers specialized centers that you can assign to your employees, customers, vendors and partners. Centers give people you do business with limited access to your account. Each center contains a set of tabs and links that corresponds with different roles in your business.

Below is a list of the centers used in NetSuite.

Center	Content
Executive	View reports and registers that help you make decisions.
Accounting	Enter transactions, view financial reports and manage income and expenses.
Sales	Enter sales transactions, work with customer records and view sales reports.
Support	Manage customer support cases and knowledge bases and view customer support reports.
Marketing	Create and manage marketing campaigns and view sales and profitability reports.
Store Management	Manage your items and inventory, organize your Web site content, work with records and view sales and inventory reports.
Shipping	Manage shipping and receiving and keep track of inventory with inventory reports.
Employee	Track time, enter purchase requests and use NetSuite calendar.
Customer	View estimates, place orders and view account information.
Vendor	View your transaction history and purchase requests.
Partner	Generate reports relating to partners and promotion codes, and create new promotion codes

Anyone who is assigned a role can access their center from anywhere, at any time.

Different roles have access to different links, even though they may share a center. For example, A/R clerks and A/P clerks both use the Accounting Center, but only the A/R clerk can post payments to open invoices.

Getting Help

NetSuite offers a variety of online help topics that can help orient you to the system and improve your efficiency.

At the top right corner of every page in NetSuite, there is a Help link. Clicking this link opens a window with help topics related to the page you are on, a glossary of terms and an index of all help topics.

There are three major types of help files:

- **What Is…?**

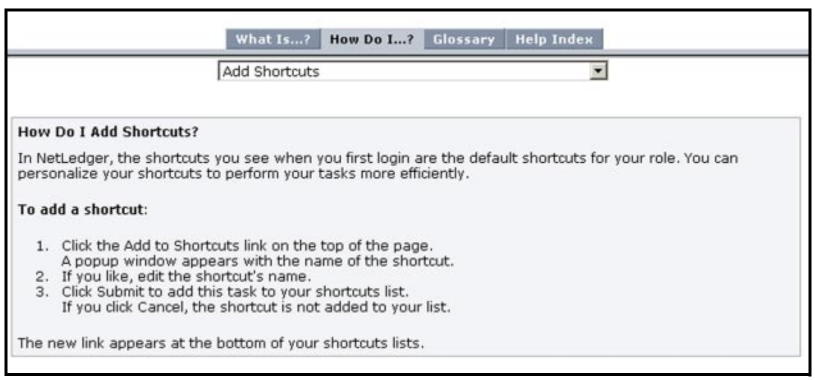
  What Is help topics offer general information on how you can use a feature in NetSuite.

  For example, if you click Help in the upper right corner of the Home page and click the What Is tab, you can read about the major tabs and the portlets available on the Home tab.

- **How Do I…?**

  How Do I help topics offer step-by-step instructions.

  For example, if you click Help in the upper right corner of the Home page and click the How Do I tab, you can learn how to add Shortcuts to your Home page.



- **Field-level Help**

  In NetSuite, information is entered in fields. Clicking the name of a field brings up a window with field-level help.

  For example, in the Shortcuts portlet, click Create Invoices. When the Invoice page opens, click the words Customer:Job. The field-level help window pops up and offers instructions for what to enter in this field and how this info is used in the system.

Field-level help is specific and easy to access. Whether you are wondering which format to enter phone numbers in or where a memo might appear on a printed form, field-level help is the easiest place to find out.

There are other resources available to help you use NetSuite.

- **Glossary**

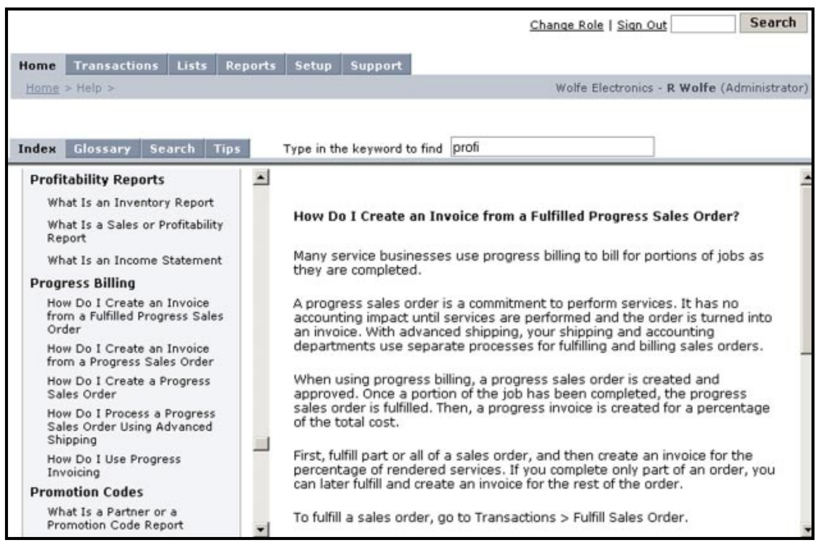
  To use the glossary, click Help in the upper right corner of any page, and click the Glossary tab. The Glossary tab contains definitions of accounting terms and terms specific to NetSuite.

- **Help Index**

  To search by a specific topic or keyword, click the Help Index tab. Click a letter or type a word in the Jump field to see a list of the relevant What Is and How Do I topics you are looking for. Then, click the name of the file to view it.

- **Help Search**

  To search for words in the text of a help file, go to Support > Help, and click the Search tab. The Help Search works like an Internet search engine. Enter the words that might appear in the help topic you are looking for, and click Go.



Chapter 3 Customization

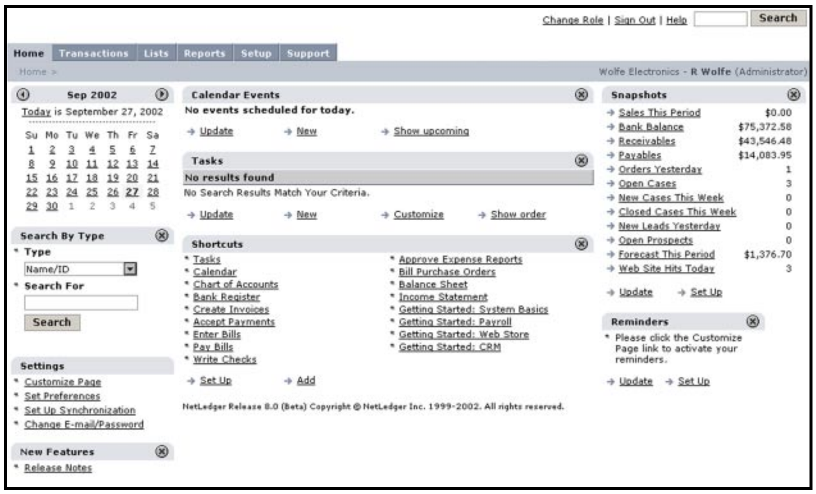
In This Chapter

In this chapter, you will learn how to customize NetSuite for your business.

This chapter takes you through the Executive Center and gives you an idea of how you can make NetSuite work for you. Before you begin this chapter, change your role to CEO.

Home Page

When you first log in to NetSuite and after you have chosen your role, you arrive at your Home page. The Home page is unique to each individual, and you can customize it to suit your needs.



The Home page is divided into sections, called portlets. When you log in to NetSuite with the CEO role for the first time, the Calendar, Events and Reminders portlets are shown at the top of the screen. If you scroll down on the Home page, you see other portlets with titles in bold.

Portlet	Content
Snapshots	Shows reports or graphs of your company's performance.
Reminders	Lists deadlines and due dates. You can follow links to complete each task.
Events	Keeps track of your daily calendar.
Tasks	Tracks the work you complete.
Shortcuts	Links to the pages you use most often.
Search	Lets you quickly find any information you need.
Settings	Allows you to customize your suite.
New Features	Updates you on the latest improvements to NetSuite.
Tip of the Week	Offers helpful suggestions and shortcuts for using NetSuite.

You can select which portlets appear on your Home page by clicking Customize Page in the Settings portlet.

Customizing Your Suite

The Set Preferences page is where you select the color theme for your suite, the style and alignment of the tabs, and the type of dropdowns you want to use. The Set Preferences page can be accessed from most tabs in the Executive Center.

The Customize Page link lets you set up the arrangement and content of your portlets. The Customize Page can be accessed from most tabs in the Executive Center, allowing you to customize the information that appears throughout your suite.

You can choose to show only those portlets that are most useful to you, and you can customize their content. There are two ways to do this:

- On the Home page, click the Set Up link in the portlet you want to customize.
- In the Settings portlet on the left side of the Home page, click Customize Page. The Customize Page opens. Click the subtab for the kind of portlet you want to set up.

Below each portlet is a set of links that you use to set up, add to, or update the information in the portlet.

This is the Snapshots portlet as it appears on your Sales/Marketing page. Notice the links at the bottom of the portlet.

Snapshots

You can show snapshots that give you an instant update of the information you need to make good decisions for your business. Snapshots can include information like:

- Your sales figures from the past week
- Your five best selling items
- The names and phone numbers of important clients

To set up snapshots on the Home, Sales/Marketing, Expenses, Payroll and HR and Financial pages, click Customize Page. Then, click the Snapshots subtab. Choose from NetSuite's standard snapshots, or select an enhanced snapshot on the Enhanced subtab. Click Save.

After you have chosen which snapshots to show, you can choose to display enhanced snapshots as lists or graphs.

To customize an enhanced snapshot, click Set Up Snapshots on the Customize Page. Then, click the Enhanced subtab. Choose a period or date range and choose how the snapshot will appear, and click Save.

Custom Snapshots

You can also create custom snapshots that present the results of your saved transaction or list searches. For example, you might search for all customers with businesses located in California. The list of names with phone numbers and e-mail addresses can be shown as a custom snapshot.

CA Customers

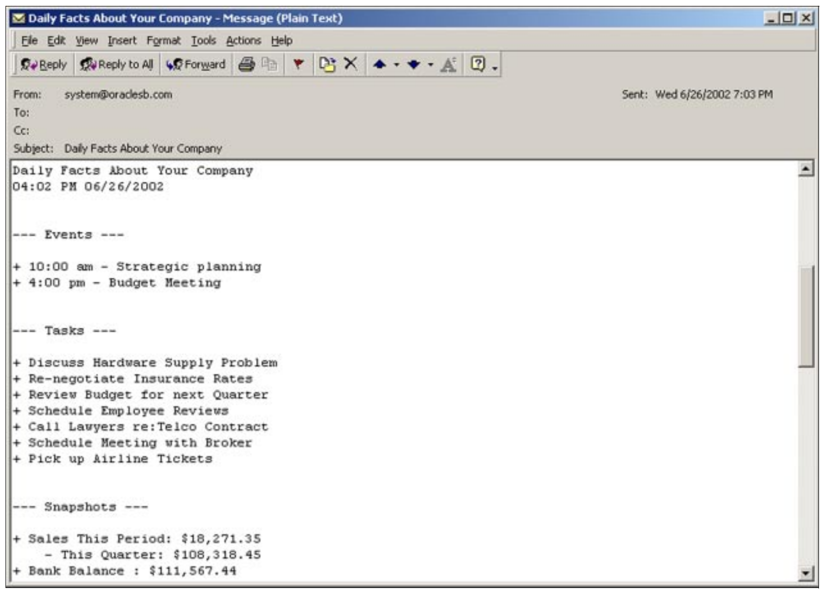
Name △	Primary Contact	Phone	E-mail	Fax
B-Sharp Music	Tony Jones	800-555-4681	bsharp@freeversion.net	
Bay Media Research	Wally Morton	800-555-0609		
Chess Art Gallery	Baron Chess	831-555-5229	chessart@freeversion.net	831-555-5230
CVM Business Solutions	Milosz Adamczyk	650-555-7709	cvmbiz@freeversion.org	650-555-7710
Helton's Office Supply		415-555-3883	helton@hos.com	
(19 more)				

For more information on saved searches, See “Records” on page 32.

E-mail Updates

NetSuite can send periodic e-mail updates to you with the information from your Events, Tasks, Snapshots and Reminders portlets. To receive these updates, click Set Preferences. On the Set Preferences page, click the Alerts subtab. Check the box next to the time of day you want to receive the update. Click Save.

During your Free Trial, you receive e-mail updates like the one below from Wolfe Electronics, the sample company.



Reminders

You can have NetSuite remind you of deadlines. The Reminders portlet is a set of links to the pages where these tasks can be completed. You can choose what to be reminded of. Reminders can appear on the Home, Sales/ Marketing, Expenses, Payroll and HR, and Financial pages in the Executive Center.

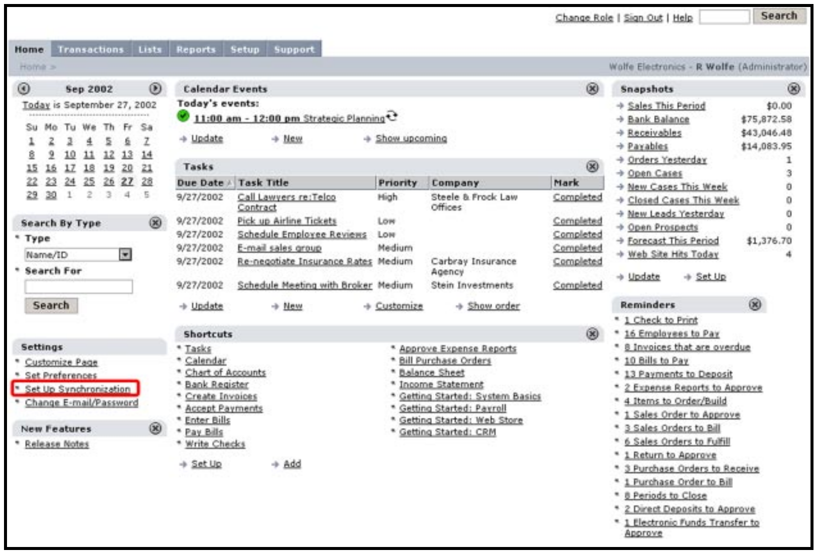
To choose your reminders, click Customize Page. Click the Layout subtab, and click Right Side Content. Check the Reminders box, and click the Reminders subtab. Check the box beside each reminder you want to show on this page, and click Save.

To customize your reminders, click Customize Page. In the upper right corner of the page, click Set Up Reminders. Choose the number of days before or after the date you want to be reminded, and click Save.

Importing Calendar and Contact Information

If you use Microsoft Outlook®, GoldMine®, ACT® or Palm™ computing devices, you can synchronize your calendar, task and contact information with NetSuite.

To synchronize NetSuite with another application, go to Home > Set Up Synchronization. Set your synchronization preferences, then click the link to download the synchronization software.



Save Intellisync to your hard drive. The account ID and information on setting up Intellisync can be found at Home > Set Up Synchronization.

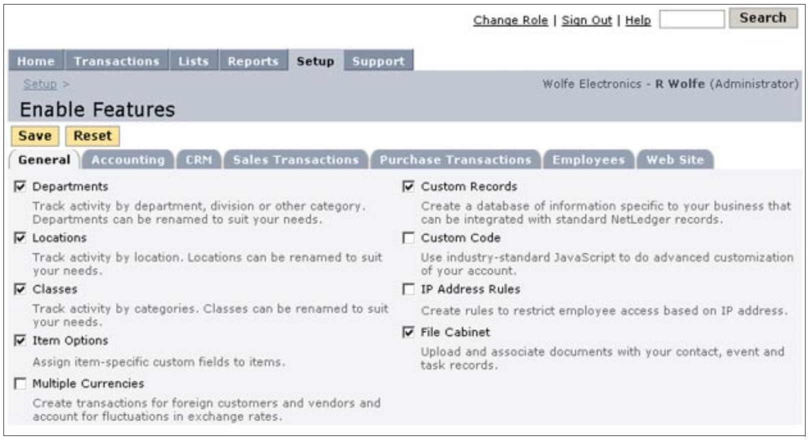
Setup

The Setup page includes everything your account administrators, sales managers, support managers, payroll managers and store managers need to set preferences for your company. This section introduces you to some of the major features you can use in NetSuite.

Before you read this chapter, change your role to Administrator.

Enabling Features

The Setup tab contains links that allow you to turn features on or off. Under the Company heading, click Enable Features.



The Enable Features page is divided into seven subtabs:

Subtab	Features
General	Turn on features that affect your entire suite.
Accounting	Enable inventory tracking, accounting periods, assemblies and more.
CRM	Enable SFA, customer support, knowledge base and marketing automation.
Sales Transactions	Enable advanced shipping, choose to use sales orders, estimates and multiple pricing.
Purchase Transactions	Enable the online bill pay feature, advanced receiving and drop shipments.
Employees	Use payroll, time tracking and expense reports.
Web Site	Turn on your company’s Web site.

Most features are turned on by default. Keeping unused features turned off removes unnecessary links from your working pages.

NetSuite Features

The Setup page contains links that allow you to turn features on or off. Under the Company heading, click Enable Features. On the Enable Features page, click each subtab, and simply check the box of any feature you want to use in your business. When you finish, click Save.

NetSuite offers the following major features:

- **Accounting and Finance** – all the tools your business needs for accurate and dependable bookkeeping.

  NetSuite's accounting feature is integrated with its other features, so you don't have to enter information twice.
- **Customer Relationship Management (CRM)** – calendar and contact management combined with a complete Sales Force Automation (SFA) and Customer Support feature. You can also use NetAnswers knowledge bases and Marketing Automation.

  Assign your sales and support teams roles that give them access to the information they need to expand your customer base and resolve issues faced by existing customers. Track developing deals with opportunity records Create tasks and events and choose to send notification e-mail. Design knowledge bases for your support reps, and send marketing e-mail.
- **Web Site –** everything you need to manage a Web site. You can choose to have NetSuite host your site or to host your own.

  Your Web site is fully integrated with the rest of NetSuite. Orders placed on your Web site automatically create sales orders and impact inventory in your suite.
- **Employee Payroll** – includes everything necessary to process payroll for your employees.

  NetSuite calculates earnings, withholdings and deductions, and generates and prints paychecks. At the end of the year, print W-2 forms.
- **Online Bill Pay –** let Paytrust send payments you've submitted in NetSuite.

  Set up a Paytrust account to have your bill payments sent automatically after your approval.
- **Customer, Vendor and Partner Centers** – specialized pages for those outside your company that you do business with.

  Customers can make payments, view estimates, and place orders in the Customer Center. Vendors can view their transaction history and purchase orders. Partners can view sales reports.
- **Time & Billing –** employees can track time worked that is charged to customers.

  Based on the information entered you can automatically invoice your customers and pay your employees.
- **Expense Reporting** – specialized forms to track employee expenses.

  Employees can report expenses anytime, anywhere with the Employee Center role.

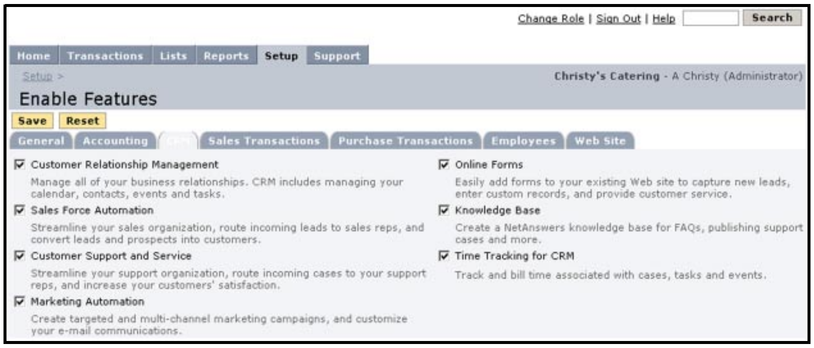
Setting Up CRM

NetSuite's Customer Relationship Management feature allows you to:

- Manage your sales and support teams using NetSuite and track quotas and forecasts
- Organize your business relationships, events and tasks
- Store and share company documents in an online file cabinet
- Create knowledge bases that can be published in NetSuite or on your NetSuite Web site
- Manage your marketing campaigns and send e-mail campaign messages using NetSuite

CRM features can be turned on by going to Setup > Enable Features and clicking the CRM subtab. Once you turn on CRM, links to CRM features appear on the Lists page, and links to setting up CRM and SFA appear on the Setup page.

This image shows the CRM and SFA features that are available on the Enable Features page.



On the Setup tab, under the Sales Force Automation heading, your sales managers can set up rules and territories that assign new leads to the appropriate sales people. You can post lead forms on your Web site and create records from the information new leads submit.

Under the Support heading, your support managers can create rules and territories that assign support cases to the appropriate support reps. You can post case forms on your Web site and create case records with the information your customers submit.

Setting Up a Web Site

NetSuite lets you create a Web site in minutes. Whether you host your own site or let NetSuite host it, your Web site is completely integrated with your accounting and CRM data. Orders placed on your Web site automatically become sales orders. New customers' billing information creates a customer record your sales people can access and follow up on.

To set up your Web site, go to Setup > Enable Features, and click the Web Site subtab.

Setting Up Payroll

NetSuite offers all the tools you need to process payroll for all of your employees. It calculates earnings, withholdings and deductions, and generates and prints paychecks. NetSuite even updates federal and state tax tables whenever changes occur.

To set up payroll, go to Setup > Enable Features, and click the Employees subtab. Check the Payroll box, and click Save.

Records

Records manage the people and companies you do business with. The Executive Center offers a variety of records that you can use.

Change your role to CEO before you read this chapter.

CEOs have access to the following records:

Tab	Records
Sales/Marketing	Leads, prospects, customers, items, contacts, other lists, other names
Expenses	Items, other lists, vendors, contacts, other names
Payroll and HR	Employees
Financial	Departments, classes, other lists, accounts

As your business grows, new records will be constantly entered and changed. Click New beside any link to create a new record of that type.

To view an existing record, click the name of the list that contains that record. When the list appears, click the name of the individual record you want to see.

There are two ways to find a record quickly:

- In the upper right corner of every page is a Search field. Enter part of the name of the record you are looking for, and click Search.
- Beside most lists is a Search link. Click Search and a search page opens. Click the General tab and select any information that relates to the record you are searching for. Click the Results tab and designate how you want the search results to display, and click Submit.

You can save or export searches you want to use in the future. Click Search beside the list you want to search. In the Search Title field enter a name this search will be saved as. Enter the search criteria and how you want the results displayed, and click Save. Administrators can also make saved searches public so they can be used by anyone with access to your account.

To use a saved search, go to Payroll and HR > Saved Searches. Click the title of the search. When the search page appears, click Submit.

These saved searches can also appear as Custom Snapshots. For example, the Administrator of Wolfe Electronics has a chart of corporate accounts on the Home page.

Transactions

The Executive Center includes links to a variety of transaction forms.

Transactions are placed on pages with related records and reports. For example, the Sales/Marketing page has links to estimates, cash sales and invoices.

Beside most links to transaction forms are List links. Click List beside a transaction type to see a list of all past transactions of this type.

NetSuite offers an Auto Fill feature for transaction forms. With autofill, whenever you enter a transaction for a customer, NetSuite automatically enters the same information that was entered for this customer the last time you submitted this transaction.You can always change any of the autofilled information according to each transaction.

You can enable Autofill by going to Home > Set Preferences. Check the Auto Fill Transactions box, and click Save. Even if you turn this preference off, you can still click the Auto Fill button on Transaction pages.

There are two ways to find a transaction quickly:

- In the upper right corner of every page is a Search field. Enter some of the information in the transaction you are looking for, and click Search.
- On most tabs in the Executive Center, you can click Search Transactions. Enter any information you know about the transaction. Then you can click Submit to search, click Save to save this search under the name entered in the Search Title field or click Export to save the search results as a CSV file. You can view CSV files in spreadsheet applications like Microsoft Excel®.

Reports

You can view over 100 different standard reports that give you an accurate picture of your business’s performance.

Reports are grouped with related transactions and records. For example, the Sales/Marketing page includes links to A/R reports, sales reports and open transaction reports.

Generating Reports

To generate a report, click the name of the report. You can customize a report’s results by adjusting the filters at the bottom of the report. You can view transactions or records by clicking links within reports. For instance, on the A/R Register report, you can click the name of a transaction to see a customer payment or an invoice in detail.

You can change the date or period reports cover by changing what is selected in the filters at the bottom of the report.

You can highlight a line of information on any report by passing your mouse icon over a line. This is especially useful when viewing highly detailed reports and registers.

Generating Custom Reports

Administrators can customize many standard reports. To customize a report in the Administrator role, click the Customize link next to the report’s name. You can save your customized reports by clicking Save.

In the CEO role you can generate saved custom reports at Reports > View Reports.

You can e-mail reports to your customers, partners, vendors and employees by simply clicking the E-mail button at the bottom right corner of any report. When the E-mail Report popup appears, select the names of those you want to receive the report and click Save.

You can also export reports in CSV format. After generating the report, click Export at the bottom right corner of the page. You can view CSV files in spreadsheet applications like Microsoft Excel.

There will be many times when you want to open a link in a new window. You might want to open a transaction listed on a report while keeping the report page open, for example.

- To open a link in a new window when using a PC, right-click the link, and then select Open in a New Window.
- If you use a Mac, hold down the mouse button on the link until a menu pops up. If you use Internet Explorer, select Open Link in New Window. If you use Endoscope, select New Window with this Link.

Chapter 4 Test Driving Wolfe Electronics

In This Chapter

Now that you are familiar with the layout of NetSuite, go through these sample exercises and experience its seamless integration.

You will:

- Customize the appearance of your suite
- Create, bill and fulfill a sales order
- Enter a bill and print a check to the vendor
- Experience how your Web store creates business
- Create an custom item option

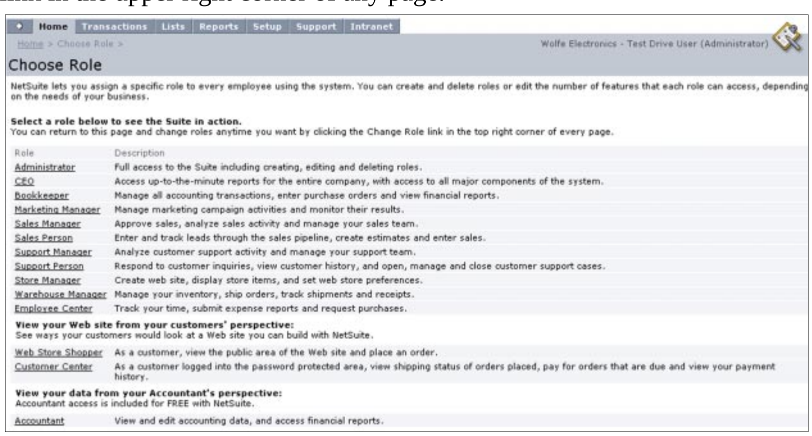
Wolfe Electronics Sample Data

Wolfe Electronics is a fictional retail business, designed to show you how NetSuite can help increase the efficiency of your business.

When you log in to your Free Trial account, you arrive at the Choose Roles page. You are presented with a list of roles representing every level of a company's operation. For more information about roles, see "Roles" on page 14.

There are fourteen employee roles to choose from, and two roles from the customer's perspective. Each role has a different level of access, depending on the demands of that person's job.

During the course of these sample exercises, you will be asked to change between the roles on this list. To change your role, click the Change Role link in the upper right corner of any page.



Customizing Your Suite

One of the first things you want to do is to customize the appearance of NetSuite. You can change the appearance of your suite and even create your own custom color themes.

Changing Your Color Theme

You want to change the color theme.

Change your role to CEO.

To change your color theme:

1. Click the Home tab.
2. On the Home page, in the Settings portlet on the left side of the page, click Set Preferences.

   The Set Preferences page appears.
3. On the Set Preferences page, click the Appearance subtab.
4. In the Color Family field, select a color theme.
5. In the Color Saturation field, select the intensity of your color theme.
6. In the Color Lightness field, select how dark or light you want your color theme.
7. Click Save.

The Executive Center appears in your new color theme.

Anyone in your company using NetSuite can choose a personal color theme. The color theme you choose doesn't affect what others see when they log in.

This is a picture of the Set Preferences page:

Creating New Color Themes

The administrator can create new color themes to match your company’s logo. You can apply a custom color theme to your suite and to your Oracle Small Business Web site.

Change your role to Administrator.

To create a color theme:

1. Click the Lists tab.
2. On the Lists page, under the Web Site heading, click New next to Color Themes.

   The Color Theme page appears.
3. In the Name field, enter **Wolfe Colors**.

   This is the name of the color theme you will select in the Classic Color Theme field on the Set Preferences page.
4. Under the Colors tab, click the Pick icon to the right of each field to choose a color for each section of the page.
5. When you have finished, click Save.

Now, you can select **Wolfe Colors** on the Set Preferences page in the Classic Color Theme field.

There is also an Advanced Editing feature on the Color Theme page. If you check the Advanced Editing box, you can enter RGB and HSL values.

Changing the Navigation Dropdowns

You can change the kind dropdowns you use to navigate in NetSuite.

Remain in the Administrator role.

To change the kind of dropdowns:

1. Click the Home tab.
2. On the Home tab, in the Settings portlet on the left side of the page, click Set Preferences.

   The Set Preferences page appears.
3. On the Set Preferences page, click the Appearance subtab.
4. In the Dropdown Menus field, select a dropdown style.
5. Click Save.

Now, when you move between tabs on your center, you can use the dropdowns you prefer.

Making Sales

NetSuite's accounting and CRM features are completely integrated. The information you enter in lead, prospect or customer records is automatically filled in on transaction forms. Transactions are also recorded on the Transaction History subtab of customer records for quick reference.

Entering a Lead Record

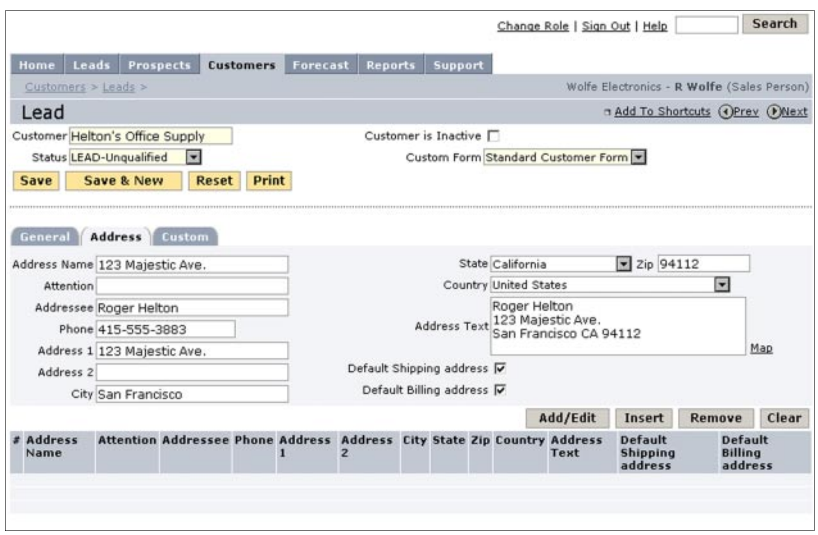
Whenever Wolfe Electronics' sales team gets information about a potential customer, they create a new lead record.

Change your role to Sales Person.

To create a new lead record:

1. Click the Leads tab.
2. On the Leads page, under the Relationships heading, click New next to Leads.

   The Lead page opens.
3. In the Customer field, enter **Helton's Office Supply**.
4. In the Phone field, enter **415-555-3883**.
5. In the E-mail field, enter **helton@hos.com**.
6. Click the Address subtab.



7. In the Label field, enter **Store Address**.
8. In the Address 1 field, enter **123 Majestic Ave**.
9. In the City field, enter **San Francisco**.
10. In the State field enter **CA**.
11. In the Zip field, enter **94112**.

    Notice that the address you entered appears automatically in the Address Text field.

    Notice that the Default Shipping address and Default Billing address boxes are checked. This address will be used by default when Wolfe bills or ships to Helton's Office Supply.
12. Click Add/Edit.
13. Click Save.

Now, you can enter transactions for this lead.

Preparing an Estimate

Helton's Office Supply asks that you prepare an estimate for four new laser printers for their office.

You can prepare an estimate with the Sales Person role.

To prepare an estimate for this lead:

1. On the lead record, in the upper right corner of the page, click Estimate.

   The Estimate page opens.

   Notice that the Date field shows today's date. The next available estimate number is also assigned.

   In the Customer:Job field, **Helton's Office Supply** is automatically selected.
2. Check the Taxable box.

   You have the option to print, e-mail or fax this estimate once you submit it. The lead's e-mail address appears in the field beside the To Be E-mailed check box. For the purposes of this exercise, leave all these check boxes unmarked.

   The Bill To field shows the lead's address. The Tax field automatically reflects the tax rate appropriate for the lead's address.
3. In the Item column, select **Peripherals:ManuScript 1000 Laser Printer**.

   Notice that information for this item appears in the Quantity, Description, Rate, and Amount columns.
4. In the Quantity column, enter **4**.
5. Click Add.

   The item is added to the list at the bottom of the estimate.
6. Click Save.

To view this estimate, click the Leads tab and click the List link next to Prepare Estimates. Click the estimate number you just created for Helton's Office Supply.

Creating a Sales Order From an Estimate

After seeing the estimate you prepared, the office manager at Helton's Office Supply decides to purchase the printers.

You can create a sales order from an estimate with the Sales Person role.

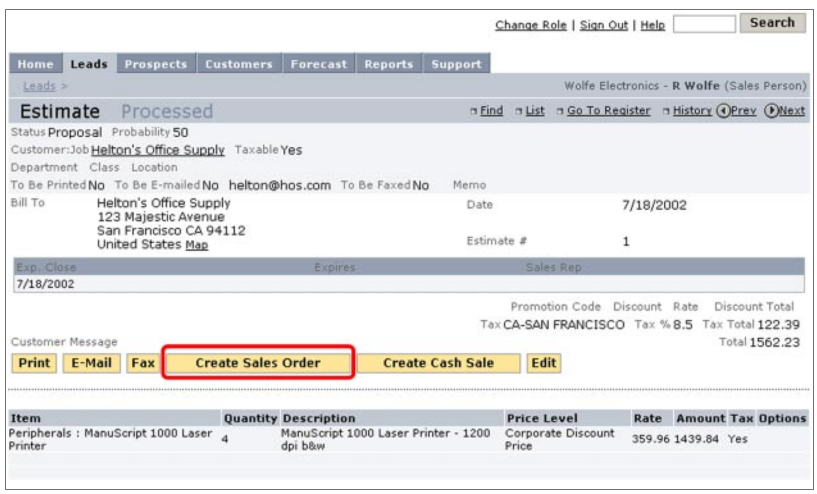
To create a sales order from an estimate:

1. Click the Leads tab.
2. On the Leads page, under the Transactions heading, click the List link next to Prepare Estimates.
3. In the Number column, click the number of the estimate you created for Helton's Office Supply.

   The Estimate page opens.
4. Click Sales Order in the middle of the page.

   The Sales Order page appears.
   The information that appeared on the estimate is automatically filled in on the sales order.

   In the Custom Form field, make sure that **Standard Sales Order - Invoice** is selected.
5. Click Save.



Approving a Sales Order

Wolfe Electronics set the default status of sales orders to Pending Approval at Setup > Set Up Accounting. This means that sales managers must approve all sales orders entered by sales reps.

Change your role to Sales Manager.

To approve a sales order:

1. Click the Prospects tab.
2. On the Prospects page, under the Transactions heading, click Approve Sales Orders.
   The Approve Sales Order page opens.
3. In the Approve column, check the box next to the sales order for Helton's Office Supply.
4. Click Save.

Fulfilling a Sales Order

After a sales order is approved, Wolfe Electronics' warehouse manager checks inventory and fulfills the order.

Change your role to Warehouse Manager.

To fulfill a sales order:

1. Click the Shipping tab.
2. On the Shipping page, under the Shipping heading, click Fulfill Sales Order.
   The Fulfill Sales Order page appears.
3. In the Customer field, select **Helton's Office Supply**.
   The sales order appears in the list.
4. In the Fulfill column, check the box beside the sales order.
5. Click Save.
   The Item Fulfillment page opens.
6. Click Save.

Billing a Sales Order

After the sales order is fulfilled, you can bill Helton's Office Supply.

Wolfe Electronics' bookkeepers maintain accounts receivable and accounts payable.

Change your role to Bookkeeper.

To bill a sales order:

1. Click the Customers tab.
2. On the Customers page, under the Sales heading, click Bill Sales Orders.

   The Bill Sales Order page opens.
3. In the Customer field, select **Helton's Office Supply**.
4. In the Invoice column, check the box next to the sales order.
5. Click Save.

   The Invoice page opens. Helton's Office Supply's information is automatically filled in on the form.
6. Click Save.

You can choose to e-mail, fax or print an invoice by checking one of those boxes on the invoice and then submitting it.

Accepting Customer Payments

Now that the sales order has been billed, Wolfe Electronics can accept Helton's payment on this open invoice.

You can accept payments with the Bookkeeper role.

To accept customer payments:

1. Click the Customers tab.
2. On the Customers page, under the Accounts Receivable heading, click Accept Customer Payments.

   The Payment page opens.
3. In the Customer:Job field, select **Helton's Office Supply**.

   The Invoice appears in the list at the bottom of the screen.
4. In the Payment Amount field, enter **1000**.
5. In the Payment Method field, select **Check**.

   Payments by cash and check are considered undeposited funds. Once you deposit the check in an account, you can submit the deposit at Financial > Make Deposits.
6. In the Check # field, enter **30303**.
7. In the Apply column, check the box next to the invoice.
8. Click Save.

Helton's Office Supply's payment now appears on Wolfe Electronics' A/R Register.

Generating Sales Reports

There are a variety of sales reports you can use to track your business's success. Wolfe's Bookkeeper takes a look at the A/R Register report to see the impact of the sale.

You can view the A/R Register report with the Bookkeeper role.

To view the A/R Register report:

1. Click the Reports tab.
2. On the Reports page, under the Customers/Receivables heading, click A/R Register.

   The A/R Register report is generated.
3. Notice the sale to Helton's Office Supply and the payment of $1000.
4. Click the date beside Helton's payment.

   The Accept Customer Payments page appears.
5. Notice the Current Balance reflects the payment.

Other roles give access to other sales reports. For example, Wolfe Electronics' CEO wants to see a detailed sales report for Helton's Office Supply.

Change your role to CEO.

To view a detailed sales report by customer:

1. Click the Reports tab.
2. On the Reports tab, under the Sales heading, click Sales by Customer Detail.

   The Sales Detail by Customer report is generated.
3. Scroll down to Helton's Office Supply.

Paying Bills

NetSuite offers all the tools your A/P department needs to manage your company's purchases.

Entering a Bill

To effectively process bills in NetSuite, enter bills when they arrive. When a bill is due, you pay the bill in the system and a check is printed with information about the vendor automatically filled in on the check.

Wolfe Electronics receives a $500 bill for the printing of its fall catalog.

Change your role to Bookkeeper.

To enter a bill:

1. Click the Vendors tab.
2. On the Vendors page, under the Purchases heading, click Enter Bills.
   The Bill page opens.
3. In the Vendor field, select **Torrance Printing, Inc**.
   Torrance Printing's terms for Wolfe Electronics appear in the Terms field.
   You aren't certain what to enter in the Reference Number field.
4. Click the words **Reference No.**
   Field help pops up explaining how the reference number is used and provides an example of what you might enter.
5. In the Reference No. field, enter **3021** for the vendor's invoice number.
6. In the Memo field at the top of the page, enter **Fall Catalog**. This appears on the memo line of the check you print for this bill.
7. On the Expenses subtab, in the Account field, select **Advertising**.
8. Under the Expenses subtab, in the Amount column, enter **500**.
9. In the Memo field, enter **Fall catalog**.
   This memo appears on this transaction only.
10. Click Add.
    The Amount field in the upper part of the page is updated with the bill's total.
11. Click Save.

This bill impacts Wolfe's advertising account once the bill is paid.

You can always click List next to a transaction link to see a list of transactions your company has entered. To see the bill you entered for Torrance Printing click List next to Enter Bills.

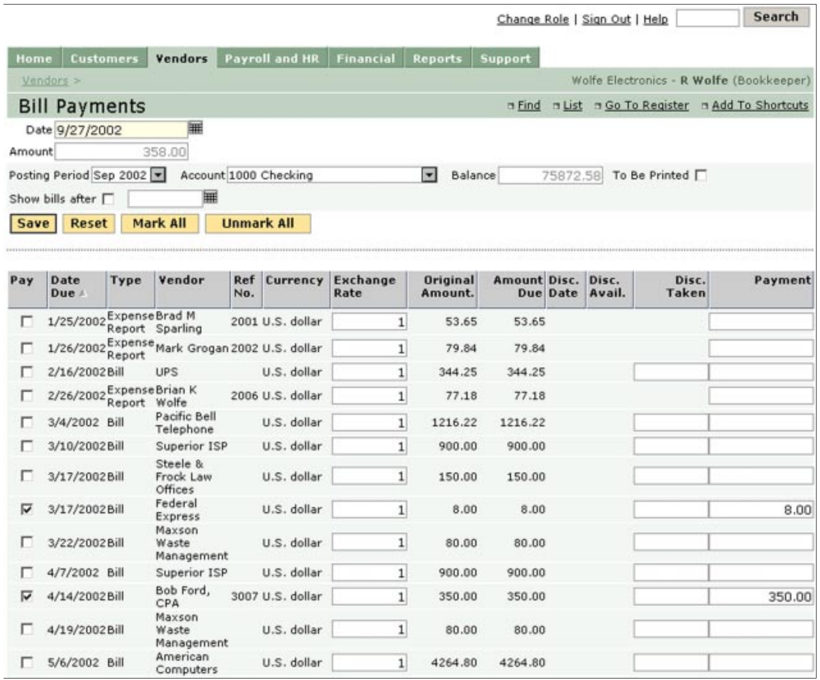
Paying a Bill

When this bill is due, Wolfe Electronics' bookkeeper pays it.

To pay a bill:

1. Click the Vendors tab
2. On the Vendors page, under the Accounts Payable heading, click Pay Bills.

   The Bill Payments page opens. All the unpaid bills that have been entered are listed.



Pay	Date Due	Type	Vendor	Ref No.	Currency	Exchange Rate	Original Amount.	Amount Due	Disc. Date	Disc. Avail.	Disc. Taken	Payment
☐	1/25/2002	Expense Report	Brad M Sparling	2001	U.S. dollar	1	53.65	53.65				
☐	1/26/2002	Expense Report	Mark Grogan	2002	U.S. dollar	1	79.84	79.84				
☐	2/16/2002	Bill	UPS		U.S. dollar	1	344.25	344.25				
☐	2/26/2002	Expense Report	Brian K Wolfe	2006	U.S. dollar	1	77.18	77.18				
☐	3/4/2002	Bill	Pacific Bell Telephone		U.S. dollar	1	1216.22	1216.22				
☐	3/10/2002	Bill	Superior ISP		U.S. dollar	1	900.00	900.00				
☐	3/17/2002	Bill	Steele & Frock Law Offices		U.S. dollar	1	150.00	150.00				
☑	3/17/2002	Bill	Federal Express		U.S. dollar	1	8.00	8.00				8.00
☐	3/22/2002	Bill	Maxson Waste Management		U.S. dollar	1	80.00	80.00				
☐	4/7/2002	Bill	Superior ISP		U.S. dollar	1	900.00	900.00				
☑	4/14/2002	Bill	Bob Ford, CPA	3007	U.S. dollar	1	350.00	350.00				350.00
☐	4/19/2002	Bill	Maxson Waste Management		U.S. dollar	1	80.00	80.00				
☐	5/6/2002	Bill	American Computers		U.S. dollar	1	4264.80	4264.80				

3. Because you want to print a check for this bill, check the To Be Printed box.

   You can print this check after the payment is submitted.
4. Check the box next to the bill for Torrance Printing, Inc.

   The total due appears in the payment column for this bill. You can change this amount if you want to pay only part of the bill at this time.
5. Click Save.

Once the payment has been submitted, it is applied to the associated expense account. In the case of Torrance Printing, Inc., the payment of $500 is deducted from Wolfe's advertising account.

Now, Wolfe's bookkeeper can print the check.

Printing a Check

Once a bill has been paid in NetSuite, Wolfe Electronics' bookkeeper can print a check to send to the vendor.

You can go to the NEBS Web site at http://www.nebs.com/NASApp/nebsEcat/products/partners/index.jsp?partnerID=64244 to purchase NetSuite checks. You can also print using QuickBooks® checks. For this exercise, you will print on regular paper.

To print checks, you need Adobe® Acrobat® Reader. We recommend that you use version 5.0. You can download Adobe Acrobat Reader from Adobe's Web site at:
http://www.adobe.com/products/acrobat/readstep2.html.

To print a check:

1. Click the Vendors tab.
2. On the Vendors page, under the Accounts Payable heading, click Print Checks and Forms.

   The Print page opens.
3. On the Print page, click Checks.

   The Checks page opens.
4. In the Account field, select **Checking**.

   All transactions that have been paid and marked To Be Printed appear in the list.
5. In the Print column, check the box next to the payment to Torrance Printing, Inc.

   If you pay multiple bills at once, you can print multiple checks at once by checking the boxes next to those bills.

   NetSuite enters the next check number in the First Check Number field.
6. Click Print.

   Your check appears in PDF format.
7. Click the Adobe Acrobat Reader Print button.
8. Click OK in the Print window.

Notice the check includes the vendor's name and address, the memo you entered and today's date. Wolfe uses voucher checks, so a voucher is printed beneath the check.

An administrator can select the company's check type at Setup > Setup Company. Under the Printing subtab, in the Default Check Type field, choose between voucher and standard checks.

Using Your Web Site

Wolfe Electronics maintains a Web site that is hosted by NetSuite.

Wolfe's Web site is created from data stored in Wolfe's NetSuite account. Wolfe uses its Web site to create new leads, generate sales, and communicate with existing customers.

Getting Leads Through Your Web Site

Change your role to Web Store Shopper. Wolfe Electronics' Web site opens in a separate window.

To register with Wolfe's Web site:

1. In the upper right corner of the page, click Register.
2. In the First Name field, enter **Joan**.
3. In the Last Name field, enter **Franklin**.
4. In the E-Mail field, enter **joan@syndex.com**.
5. In the Password and Re-enter Password fields, enter **joan21**.
6. In the Password Hint field, enter **Softball jersey**.
7. Click Submit.
8. In the upper right corner of the page, click Sign Out.
9. Close the Web site window.

NetSuite creates a lead record from this information.

To view the lead record, change your role to Sales Manager.

To view the lead record:

1. Click the Leads tab.
2. On the Leads page, under the Relationships heading, click Leads.
   The leads list appears.
3. At the bottom of the page, in the Assigned field, select **Unassigned Leads**.
4. Notice Joan Franklin's name and e-mail address.
5. Click Joan Franklin (joan@syndex.com).
   The lead record opens.

Now Joan Franklin can use this e-mail address and password to log in to Wolfe Electronics' Web site. Joan can change her password any time she logs in by clicking the Change E-mail/Password link on the My Account page.

Making Sales With Your Web Site

Joan decides to purchase a monitor she found on Wolfe's Web site.

Change your role to Web Store Shopper.

To make a purchase on a Web site:

1. In the upper right corner of the page, click Log In.
   The Returning Customer Login page opens.
2. In the E-Mail Address field, enter **joan@syndex.com**.
3. In the Password field, enter **joan21**.
4. Click Save.
   Notice "Welcome, Joan Franklin!" in the upper right corner.
5. Click the Catalog tab.
6. Click the Monitors link.
7. Under the Miraview 17" LCD Monitor, click the Add to Shopping Cart link.
8. Click the Checkout tab.
9. In the name fields enter **Joan Franklin**.
10. Enter a shipping address.
11. Check the Use the address also as the billing address box.
12. Click Continue.
    The Edit Shipping Information page opens.
13. In the Shipping Method field select **UPS**.
14. Click Continue.
    The Enter Payment Information page opens.
15. In the Card field, select **Discover**.
16. In the Credit Card # field enter **1111222233334444**.
17. In the Expiration Date fields, select a date.
18. Click Continue.
    The Order Confirmation page opens.
19. Click Submit Order.
20. Close the Web site window.

After the order is confirmed by Joan, she receives confirmation e-mail. E-mail is also sent to Wolfe's return e-mail address.

Now Wolfe Electronics' sales manager can approve the sales order. Wolfe's warehouse manager can fulfill and ship it. Also, because Joan has purchased from Wolfe Electronics, she is considered a customer. Her record changes from a lead to a customer record.

Change your role to Sales Person.

To view a customer record:

1. Click the Customers tab.
2. On the Customers page, under the Relationships heading, click Customers.
   The Customer list appears.
3. Click Joan Franklin (joan@syndex.com).
   The customer record opens.

Customizing Sales Items

Wolfe Electronics lets customers choose the color of the cases of the CD-Rs and DVD-Rs they buy.

This choice is called an item option. Item options appear on item records and can be selected on invoices or cash sales. They do not affect accounting, however.

Creating Custom Lists

First, Wolfe's sales manager needs to create a list of color choices for CD cases. This list is called a custom list in NetSuite.

Change your role to Sales Manager.

To create a custom list:

1. Click the Set Up tab.
2. On the Setup page, under the Customization heading, click New next to Lists.
   The Custom List page appears.
3. In the Name field enter **CD Case Colors**.
4. In the Value column enter **Jewel Tone**.
5. Click Add.
6. Repeat steps 4 and 5 for **Clear** and **Black**.
7. Click Save.

This is the list of colors your customer can choose from when ordering storage media.

Creating Item Options

Now, the sales manager creates the Item Option.

To create an item option:

1. Click the Setup tab.
2. On the Setup page, under the Customization heading, click New next to Transaction Item Options.

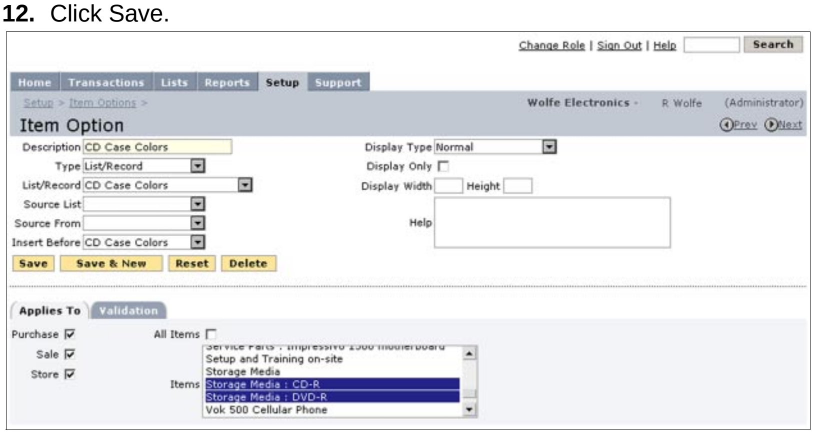
   The Item Option page opens.
3. In the Description field, enter **Case Color**.

   This is the name of the field that appears on a sale involving storage media.
4. In the Type field, select **List/Record**.
5. In the List/Record field, select **CD Case Colors**.

   This is the name of the custom list you created.
6. Under the Applies To subtab, check Purchase, Sale and Store boxes.

   This makes the color options available when Wolfe Electronics purchases or sells storage media.
7. In the Items field, scroll down to Storage Media.
8. Hold down the CTRL key and select **Storage Media: CD-R** and **Storage Media: DVD-R**.
9. Click the Validation subtab.
10. Check the Mandatory box.
11. In the Default Selection field, select **Clear**.

    Clear is automatically selected on Transactions.
12. Click Save.



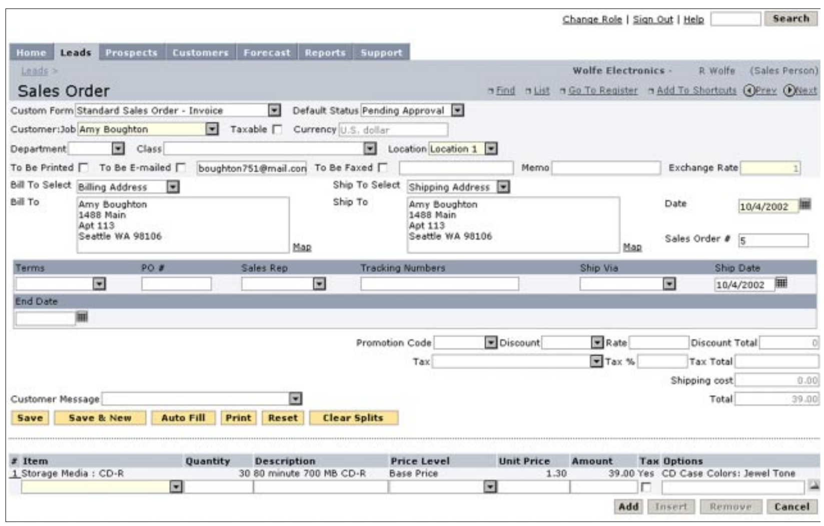
Now, whenever a customer orders CD-Rs or DVD-Rs, they can choose a color for the case.

Change your role to Sales Person.

To enter a sales order:

1. Click the Customers tab.
2. On the Customers page, under the Transactions heading, click Enter Sales Orders.
3. The Sales Order page opens.
4. In the Customer:Job field, select **Amy Boughton**.
5. In the Item column, select **Storage Media: CD-R**.
6. In the Quantity column, enter **30**.
7. Click the Set link next to the Options field.

   The Set Options window pops up.
8. In the Case Color field, select **Jewel tone**.
9. Click Submit.
10. Click Add
11. Click Save.

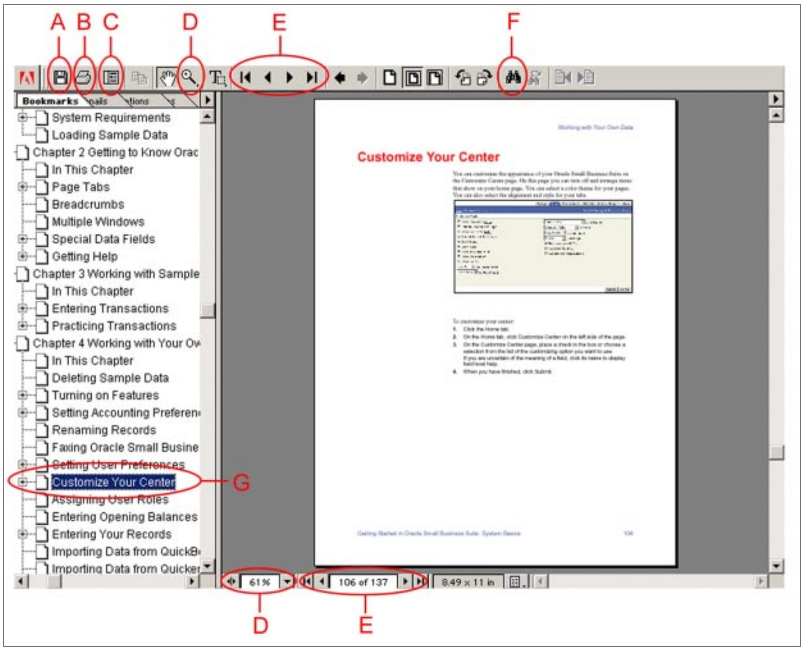


These sample exercises give you a glimpse of how NetSuite can change the way you do business. Nowhere else can you get single Web-based solution for all your business needs.

Appendix

Using Adobe Acrobat Reader®

The image and the information below was created based on Adobe Acrobat Reader 5. You can download the latest version of Acrobat Reader at http://www.adobe.com/products/acrobat/readstep2.html.



Save (A) – Click this button to save a copy of this guide on your hard drive. This guide will be updated with each release so you may not always have the most recent version saved on your hard drive.

Printing (B) – Click this button to print the Getting Started Guide.

Show / Hide Navigation Pane (C) – Click this button to show or hide the navigation pane on the right side of your screen. You can click on a page title in the navigation pane to jump to that page.

Zooming (D) – You can use the zoom tool at the top of the page, or you can select a zoom size from the drop down menu at the bottom of the page.

Navigation (E) – You can use the navigation arrows at the top of the page to view the first page of the guide, the previous page, the next page and the last page of the guide.

Find (F) – You can click the binoculars at the top of the page to search the Getting Started Guide. Type a word in the Find What field, click the find button and you will be taken to the page where your search term was found. During a search, the Find Next button is added to the toolbar to let you find the next page where your search term appears.

Bookmarks (G) – You can click a heading listed on the Bookmarks tab to jump to the page where that heading exist. If you can't view the bookmarks, click the Show/Hide Navigation button at the top of the page.

Getting Help

You can access several different types of help in NetSuite. The table below provides descriptions of the help available and examples describing how and where to access it.

Type	Description	Example
Field Level	Help that answers these questions: • “What does this field do?” • “How can I make it work for me?” • “What must I set up to make this field work correctly?”	Go to Setup > Enable Features > Accounting subtab. Click the field name “Use Accounting Periods”. A popup window appears giving you help specific to the Use Accounting Periods field.
What Is...	Help topics that describe the transaction, report or list page you are working on	Click Setup > Enable Features. Click the Help link in the top right corner of the page. A popup help window appears. A file entitled “What is Enabling Features” is shown.
How Do I...	Help topics that provided step-by-step instructions on how to perform tasks	Click Setup > Enable Features. Click the Help link in the top right corner of the page. A popup help window appears. Click the “How Do I” tab. A file entitled “How Do I Enable Features” is shown.
Glossary	Contains definitions of terms specific to NetSuite	Click Support > Help. On the Help page, click the Glossary subtab. Type “tax item” into the keyword field. The page which contains the definition of tax item appears automatically.
Index	Lists all What Is and How Do I files organized by keywords	Click Help in the top right corner of the page or click Support > Help > Index. Type “calendar” into the keyword field. The index will jump to listings for the keyword “calendar”.
Tips	Documents describing faster and easier ways to use Oracle Small Business features	Click Support > Help. Click the Tips subtab. Click the name of the tip you want to see. Click -View full details- in the Tip of the Week portlet on your Home tab.
Search	Searches the help index to find all files containing the term you enter	Click Support > Help. Click the Search subtab. Enter the term **W-2** in the search field and click Go. A list of topics related to Form W-2 appears.

Type	Description	Example
Customer Care	Support options available to users with access to the support tab	Click the Support tab. The Support tab provides access to Getting Started Guides, Tutorials, Help, Release Notes, User Groups, Certified Consultants, Customer Service options and Feedback options.
Certified Consultants	Certified Consultants can assist you with implementation and any customization needs	Search our database for a certified consultant located in your area. Search our database of approximately 1,000 Certified Consultants located throughout the country by geography or by area of specialization.

Index