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# Top Tips for NetSuite Admins



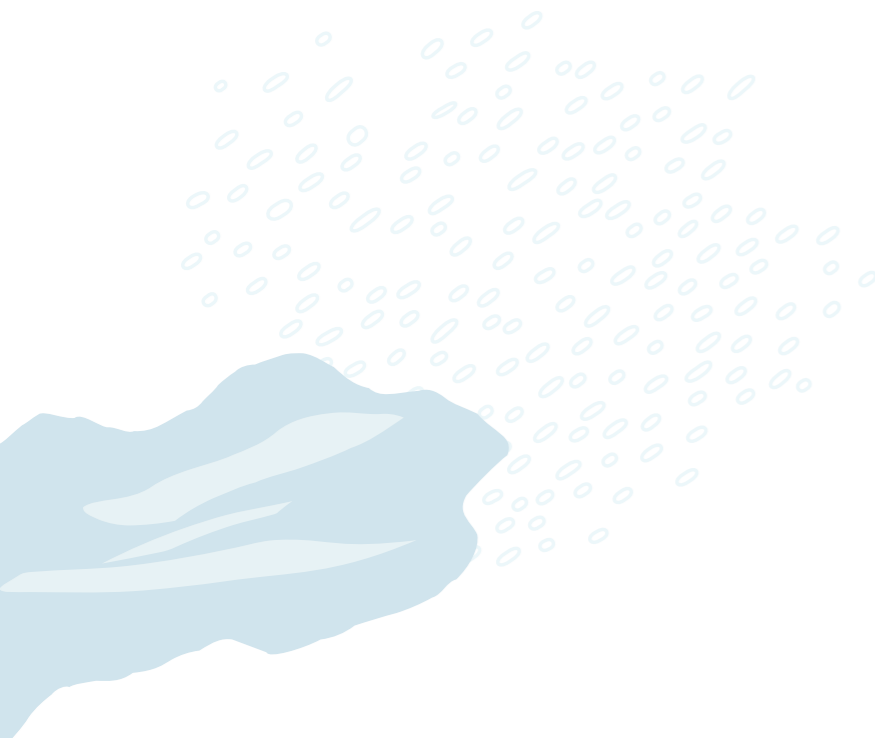
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## TOP TIPS FOR NETSUITE ADMINS

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Whether you are a new or experienced administrator, NetSuite makes it easy to provide your users with the functionality they need.

In this ebook, you'll learn the key administrator tasks in NetSuite, so you can tailor, maintain, and optimize NetSuite for your users' business needs.



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## 1. CREATING AND MODIFYING CUSTOM ROLES

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A role is a defined access configuration. To set up and manage user access to your NetSuite account, you must have the Administrator role to set up roles that can be assigned to users.

Roles include sets of permissions for viewing and editing data. Roles and their permissions determine the pages that users can see in the NetSuite interface and the tasks that they can complete. NetSuite provides many standard roles with predefined permissions. Most of these roles map to common employee positions, such as accountant and sales rep. Standard roles are also available for vendors, partners, and customers who have account access.

**Custom Roles.** While you can create roles from scratch, it's easier to use the process for customizing a standard role. If you assign custom roles rather than standard roles to users, you can make permission changes to users' assigned roles as needed. The ability to modify a role without having to change multiple users' role assignments simplifies maintenance.

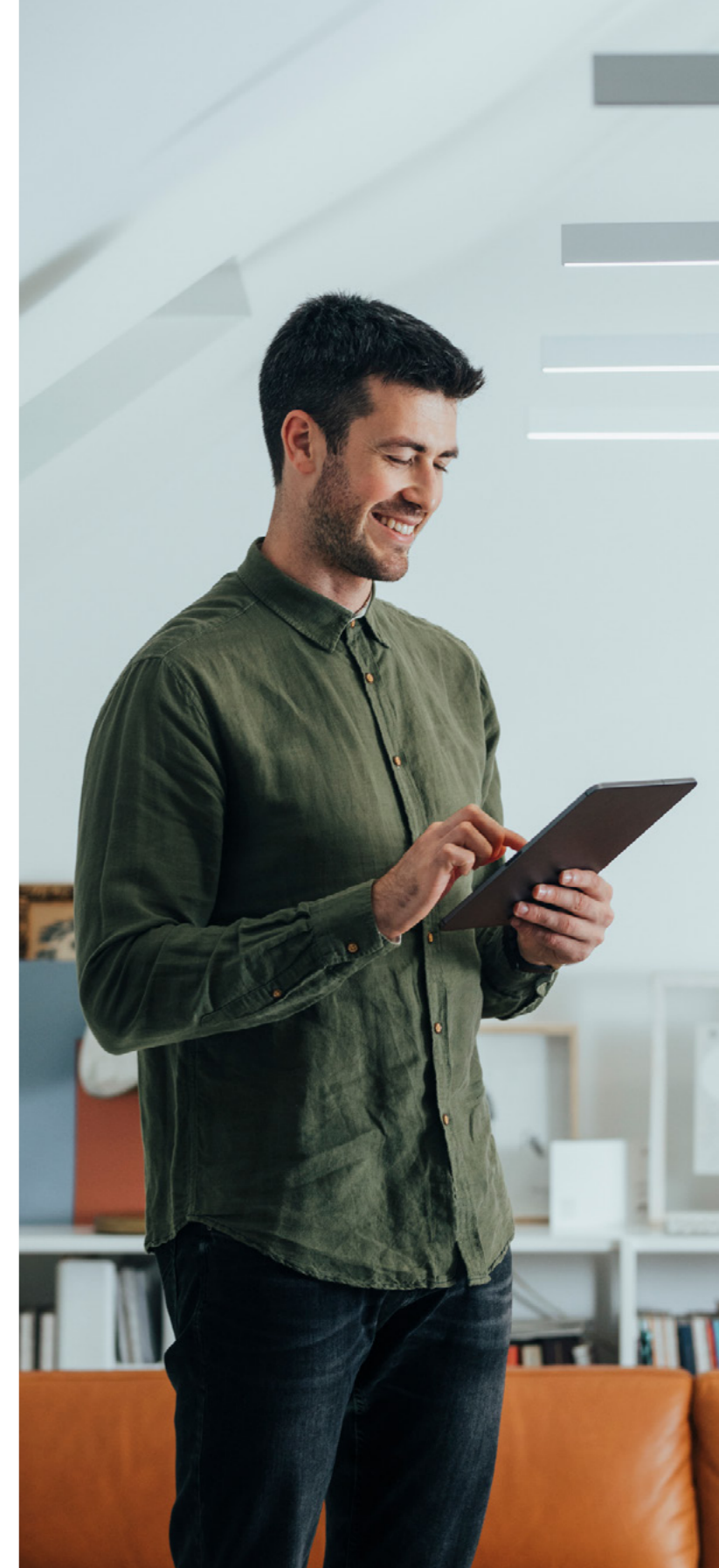
**Customizing a Standard Role.** To customize a standard role, go to Setup > Users/Roles > User Management > Manage Roles, and on the Manage Roles page, click

Customize next to a standard role. This type of custom role inherits all the standard role's permissions to start, and you can make changes as necessary. In the Name field, enter a name for this custom role. This name should be easy for you to recognize when assigning it to users. Example: CompanyName – <role name>.

**Creating Custom Roles.** To create a new role that does not start with a list of associated permissions, go to Setup > Users/Roles > Manage Roles > New. You'll first select the center type to base the role on. The center type sets default permissions and access levels that you can customize below. Note: If you are customizing a standard role, the center type is predefined.

**Copying an existing custom role.** As Administrator, go to Setup > Users/Roles > Manage Roles. Click on Customize or Edit next to the role you want to copy. Enter a different name in the Name field. Example: CompanyName – <role name>. Save or Save As as needed.

**Custom Item Number Fields.** Used to add fields to serial- and lot-numbered inventory records to track information specific to each item or workflow unique to your business. For example, quality control procedures or recall information could be tracked.



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## 2. DUPLICATE DETECTION

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Data is added to your NetSuite account daily. A NetSuite administrator needs to prevent and reduce duplicate records, and provide the most current data to users, ensuring that the account data is correct. Potential duplicate records occur when the data has either matching or similar information.

There are four record types that support duplicate detection: Customer (including Leads and Prospects), Vendor, Partner, and Contact. To enable duplicate detection, go to Setup > Company > Enable Features.

On the Company subtab in the Data Management section, confirm that the following features are selected:

- **Inline Editing:** Allows you to edit records directly from their corresponding list and from search results.
- **Duplicate Detection and Merge:** Allows duplicate detection of entity records and management of the duplicates.

Once you have enabled inline editing and merge features, you can navigate to it by going to Setup > Company > Duplicate Detection. Now you can define the criteria for detecting potential duplicates. On the Detection subtab, confirm or select the checkbox for Detect Customer Duplicates and the other available entities.

**Tip!** False duplicates might occur when multiple contact records, from one company, use the same domain name in their email addresses. Be sure to review the evaluation of the email field on a Company versus Contact record.



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### 3. PUBLISHING PERSONALIZED DASHBOARDS

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NetSuite provides a default set of dashboard portlets for each tab in each center. Depending on your role, you can personalize most default dashboard configurations. Personalization can include adding portlets, defining layouts, and arranging portlets. As an administrator, you can also personalize your dashboard and share it with users whose roles share your center.

To publish a dashboard, you need to complete the following two steps:

1. [Personalize the dashboard you want to publish:](#)

Personalization can involve changes you make to the standard NetSuite tabs or the creation of custom tabs of your own.

2. [Publish the dashboard:](#) When you have finished personalizing your own tabbed pages, you can publish one or more of them to appear on other users' tabs. See [Publishing a Dashboard](#).

When you publish a dashboard, you make the following choices. Note that some choices can be changed after you have published the dashboard, and others cannot.

- The roles to which the dashboard should be published. (Can be changed later.)
- Whether the dashboard should be published to new users only or to both existing and new users, replacing existing users' dashboards. (Can be changed later.)
- The tabbed pages to include in the dashboard. (Cannot be changed later.)
- The restriction levels for users' dashboard personalizations. (Cannot be changed later.)

After you have published a dashboard, you can make further changes to it and copy your published dashboard to any of your accounts.

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## 4. EXTENDING NETSUITE CAPABILITIES WITH SUITEAPPS

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SuiteApps are applications that extend NetSuite for specific industry and business needs. They are developed by Oracle NetSuite, or by members of the SuiteCloud Developer Network (SDN). SuiteApps are developed on the SuiteCloud platform and are certified “Built for NetSuite” (BFN) to ensure the app meets all technical requirements. BFN SuiteApps are recertified twice a year to ensure they work with each release. Some of the SuiteApps installed in your account can also be used as dashboard portlets.

You can view all SuiteApps in the SuiteApp Marketplace by clicking on the SuiteApps tab in the menu bar, or by navigating to Customization > SuiteCloud Development > SuiteApp Marketplace.

Each SuiteApp is represented by a SuiteApp tile that contains the following information:

- **SuiteApp Name:** The name of the SuiteApp, as provided by the publisher or solution provider.
- **Publisher:** The publisher name that identifies the SuiteApp publisher or solution provider.

- **First Release Date and Description:** Roll over the tile to see the first SuiteApp release date and a brief description.

NetSuite SuiteApps are generally available for installation. Some SuiteApps are available only to accounts designated by NetSuite. For details about limitations that may apply to a specific SuiteApp, be sure to explore the prerequisites.

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## SUPPORTING YOU ALONG THE WAY

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If you want a deeper dive into more NetSuite admin tips, check out these Learning Cloud Support (LCS) courses:

- [NetSuite: Administrator Fundamentals](#)
- [How Do I Navigate NetSuite?](#)
- [Harness the Power of NetSuite's Dashboards](#)

[LCS](#) provides subscription-based training that allows all NetSuite users to engage in continuous education easily and cost-effectively. With on-demand learning, hands-on lab exercises, and multiple training options, LCS can help accelerate your entire organization's system knowledge and productivity.

### **Join the NetSuite Support Community**

The [NetSuite Support Community](#) is an online gathering place for NetSuite professionals to share information, experiences, and advice. Ask a Support Guru for help with how-to questions or start a public discussion with the community.







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