

NetSuite Shortcut Secrets



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Learn how to navigate NetSuite like a pro.

Want to be more efficient and effective inside NetSuite? There are a ton of quick shortcuts for NetSuite users that will help you minimize searches and allow you to quickly access the information you are looking for. Take advantage of these helpful hints to make your day-to-day NetSuite tasks a breeze.

1. NetSuite Shortcuts portlet

The Shortcuts portlet contains links to your most routinely used reports, lists, records, and transactions. You have the ability to add, edit and change the order of the links inside the portlet and can set up pages to open in new windows. Any change you make inside the shortcuts portlet is automatically updated in the shortcuts menu. These links can also be found on the navigation menu when pressing the star icon.

A. Adding a shortcut to a page

To add a shortcut, navigate to the important page you want the shortcut to go. On the page's More menu, click Add To Shortcuts. By default, the link will be the title of the page, make sure to edit this for quick reference on your dashboard. If you want the page to open in a new window, check the Open in New Window box and click save.

B. Adding a Shortcut from the Shortcuts portlet

To add a shortcut to the portlet click New Shortcut on the menu and enter a name for the link. Insert the URL for the page and click save. If you want the page to open in a new window, check the Open in New Window box and save.

C. How to Edit Shortcut Links

Inside the **Set Up Shortcuts** pop up window, you can create, reorder, rename or remove shortcuts.

Remove: To remove shortcuts, clear the **Enable** box next to each shortcut that you want to remove and Save. Restricted shortcuts appear with asterisks and are set un-editable by the publisher.

Reorder: To reorder shortcut links click the Set Up link in the menu and click on the shortcut row to select it. Drag and drop the shortcut row where you want it by the drag gripper on the left hand side of the pop-up window and click Save.

Rename: To rename a shortcut link click on the Set Up link in the portlet menu and change the name in the label field and save. If your administrator has previously published a dashboard with links that match your custom links, your shortcut portlet will contain duplicates. The only way to remove duplicates is to remove your own custom links.

D. How to add a Portlet to a dashboard

As long as you administrator has your dashboard unlocked, you can add a portlet at anytime. To add a portlet to your dashboard, click the **Personalize Dashboard** link in the settings portlet. The **Currently Used** tab displays the portlets that are currently shown on your dashboard. Click the portlet icon to add it to the top of the page. Drag it to a specific location that you like best, otherwise the portlet automatically selects the column width that is best suited to its content.

The three types of portlet tabs available are **Standard Content**, **Report Snapshots**, and **Trend Graphics**. Once you have added a portlet onto the dashboard you can edit its information, change its location and even update the layout. Ctrl + F5 refreshes the page that you are currently on. This is useful for dashboards to refresh charts, KPI's and reminders.

E. How to delete a portlet from a dashboard

Click the portlet icon in the **Currently used** tab of the dashboard or click remove in the portlet menu. If you remove reminders, KPIs, or activities from your home page, you will no longer receive email alerts with information from the removed portlet. If you are not able to remove a portlet from a dashboard contact your administrator.

2. NetSuite Subtabs

Work faster in NetSuite with these important visual cues.

Circles on Subtabs: Circles on subtabs indicate that there is data to show saving you time from clicking for data in empty tabs.

Underlined letters: NetSuite supports keyboard shortcuts with the use of your control or Alt button. Titles like Sales, Address, Emails etc are displayed with underlined letters indicating that you press and hold Alt and the corresponding letter to switch to a subtab. Alt+G takes you directly to the Global Search from any page inside NetSuite.

3. Date Field Shortcuts

Save time entering and updating information with these date field shortcuts.
Note: These are only supported if it is a full date field that month, day and year.

Y = Yesterdays date

M = The last day of the month

T = Today's date

+ = Move the date forward a day

Shift + T = Tomorrow's date

- = Move the date backward a day

4. Reports Viewing Shortcuts

Home = First page of the report

End = Last page of the report

Page Up= Previous page of the report

Page Down = Next page of the report

5. Global Search Field Shortcuts

The global search bar provides quick access to every search, page, report, record, list and transaction inside your NetSuite system. To narrow your search results, simply add a shorthand search prefix of the first few characters of a record type, followed by a colon or caret to separate it from your search terms. Not only does this speed up the search process, but it also cleans up the results of irrelevant records. By learning a few of these shortcuts in the search bar, you can pinpoint the information, record or page you are looking for every time, with ease. Learn more.

A few prefixes to stick in your back pocket for fast searching:

Employee = emp

Phone Call = ph

Expense Report= exp

Sales Order = so

Invoice = inv

File = fi

Item = it

Estimate = est

Customer = cu



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