

ScaleNorth NetSuite MasterClass— Session 16-NetSuite Tips and Tricks – Simplicity in NetSuite = Speed!

January 23, 2026

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Objective

- ▲ We have started hosting these monthly NetSuite Master Classes, because we have found most common challenges people have with NetSuite
 - Lack of Training
 - Take advantage of saved search reporting
 - CSV Imports
 - Mass Updates
 - Simple workflows to automate processes
 - Custom Records, Forms, Fields
 - Advanced PDFs
 - Don't Know what I don't Know
- ▲ Our goal is to teach these things so companies and more importantly their employees can maximize the value and utility they get out of the NetSuite Platform/Ecosystem

Agenda

▲ Introductions

- ScaleNorth
 - Quick ScaleNorth Overview

▲ Simple Practical Tips to Help

- Reduce Clicks
- Move Faster
- Get more done with less effort

▲ Use Cases

- Preferences Tips and Tricks
- Navigation Tips and Tricks
- Saved Search Tips and Tricks

▲ Live Q&A

▲ Next Steps

Introductions



Charles Stevenson

Vice President, Sales

- ▲ Managed Sales Teams for Two Fortune 500 Companies over two decades
- ▲ BS Accounting from USC



Dean Carazza, CPA

Sr. Business Development Manager

dcarazza@scalenorth.com

714-350-6211

- ▲ 15 years of experience
- ▲ Public and Private Accounting
- ▲ 9 years NetSuite Experience
 - 2 Years Private/User - Assistant Controller for \$100M Distributor in Irvine
 - 7 years ScaleNorth
 - Led some of the largest and most complex implementations and integrations. Have done over 20 implementations.
 - Industry experience
 - Manufacturing, E-Commerce and Warehouse/Distribution SaaS, Professional Services

Meet The Team

“

We wanted a partner that could deliver fast solutions, communicate with us and keep us up to date on the status of our ERP project...ScaleNorth covered all of these bases while delivering world-class service. It's been fantastic.

Jerod Schoneman
General Manager, Total Energy Systems



275+
Team
Members



1,650+
Years of Collective
NetSuite ERP
Experience

ORACLE NETSUITE
BPO Partner



680+
NetSuite
Certifications
Held by Staff



8.5+
Avg Years of
NetSuite
Experience

ORACLE NETSUITE
Solution Provider



\$2.5B+
Annual Revenue
Transactions
Processed



57%
Percentage
of staff with
CPAs

ORACLE NETSUITE
SuiteCloud Developer Network

Services at a Glance



NetSuite
Implementation



Outsourced
Accounting



NetSuite Consulting &
Managed Services



Technical
Services

Technology Partners



Disclaimer – purpose of this class is for demonstration/educational purposes. Additionally recommend any configuration and testing always be done in a Sandbox environment first before creating/deploying in production. ScaleNorth is not responsible for any actions not performed by ScaleNorth.

Preferences Tips and Tricks



Preferences Tips and Tricks

▲ Hover over the Home Icon and Select Set Preferences



▲ General Tab

- User Profile

- From Email Address – Email you want to show as the from email address when sending emails in NetSuite

- Defaults

▪ Show Internal IDS

- › Helpful to be able to easily see/find internal IDS since often need to reference when doing bulk actions like CSV Imports in NetSuite.

▪ Optimizing NetSuite

› Maximum Entries in Dropdown

- By setting to a low number like 1, dropdown fields become typeable so easier to find the value looking for instead of only being able to scroll to the value.
- Link to Video showing/demonstrating example - <https://www.linkedin.com/smart-links/AQFhm6pXdIP1uw>

▲ Appearance Tab

- Redwood Experience – Can turn off if not a fan. I have not been able to adopt since so used and like the simplicity of previous experience

- Color Theme

- Recommended setup in your Sandbox so can clearly differentiate between Production and Sandbox. Have heard horror stories from clients who have spent a days worth of work in Sandbox not realizing they weren't in Production. – Can search for College colors like %USC – since Charles was a USC Alumni.

Preferences Tips and Tricks - Continued

▲ Analytics Tab

- Reporting

▪ Report by Period

- › If want to be able to Run Financial Reports Like Balance Sheet or Income Statement as of specific Dates/Date Ranges would need this to set to Never. If that is case though would recommend not allowing date/period mismatches as would get different results if running reports by period vs. date.
 - Common example of this is Accruals. Enter a Bill as of Bill Date but Select Period based on date incurred. This would throw off reports if some users are running by period while others are running by date.
 - We believe best practice is to not allow date period mismatches so never have to worry about discrepancies between reporting.

- Search

▪ Show List When Only One Result

- › Without being checked if have saved search and only 1 result it will take you right to that record rather than show you the search with 1 result and then giving you the option to view/edit from there.
- › Include Inactives in Global & Quick Search
 - Helpful because sometimes New Customer or New Vendor Approval Workflows will keep the record inactive until approved. If somebody tries to search and can't find have seen people enter duplicates because didn't see was already in the system but inactive, or maybe trying to search for an older customer but not showing up because inactive.

› Page Search

- Now you can search in the global search bar and it will take you to that exact field on a record even if not on that tab. Most people use Ctrl + F – to find text on a page/tab, but this is better because can search the whole record and takes you to that tab and blinks where the value is.
 - Example – Lead Record – Search on Open AI Response, then search on field on different tab like DUNS on Financial tab – You see the Field: Financial>DUNS Number returned in the global search
 - Can show how Ctrl + F would only find the DUNS results on page on

Preferences Tips and Tricks - Continued

▲ Analytics Tab - Continued

- Search - Continued

■ Global Search Customer Prefix Includes Leads and Prospects

- › Have often seen duplicate entry because in NetSuite if don't search the right syntax Lead: or Pros: might not realize there already is a lead or Prospect Record in there. By Enabling this you can just search Lead: and will return leads and prospects. Reall helpful for us in Sales as we work with Leads/Prospects a lot
 - Lead>Prospect>Customer are all 1 Record in NetSuite just going through different CRM/Sales Statuses. This is why searching on right Prefix may or may not bring up results, but this should help further.
 - Example
 - With box unchecked can search for a active prospect record Pros: Resource Staffing. If try searching Lead: Resource Staffing nothing shows.
 - After checking box can search Cust: Resource Staffing and will still return results even though is a Prospect Record or if was a Lead record will return also.
 - Cust: now returns Leads, Prospects, Customers

Navigation Tips and Tricks



Navigation Tips and Tricks

▲ Global Search

- When Search can get to records faster by hovering to expose the edit/dashboard links which saves extra clicks from loading a record then having to click the edit button and let page load again.
 - Example
 - › Can bring up Prospect: Resource Staffing in edit mode from hover
 - › Or can go straight to dashboard form there rather than load record and then click on the dashboard icon
 - › **This one Trick can probably save you 1,000 clicks a year if not more!!!!!!**
- Global Search Syntax
 - Cust: = Customer
 - Emp: = Employee
 - Inv: = Invoice
 - Search with Logical Operators
 - › Example
 - Max Computer
 - Max + Computer – limits results to where only MAX and Computer
 - MAX OR Computer – Limits results to where MAX Or Computer
 - %M – Starts with M
 - %ZZ% - Text string has two ZZ next to each other
 - Example – Search Dean – see a lot of values with Dean
 - If want Emp Record can do things like Emp: Dean + %ZZ% - can see without the %ZZ% shows Dean Nolan Also.

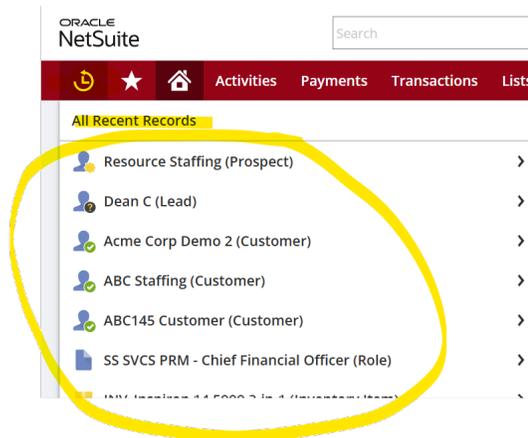
Navigation Tips and Tricks - Continued

▲ Shortcuts and Shortcuts Portlet

- Great for external links so can get there right from home page in NetSuite.
 - Example – can add my Calendly link – since have to share with people all the time
 - › Add Shortcut Portlet
 - Personalize>Shortcuts if not already added
 - Three little dots>New Shortcut
 - Calendly - <https://calendly.com/dcarazza-1>
 - Zoom Link - <https://zoom.us/meeting#/upcoming>
 - › This Tip and Trick has personally saved me 1,000 + Clicks per year and so much faster navigation

▲ Recent Records

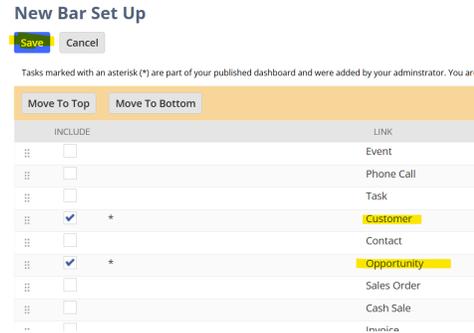
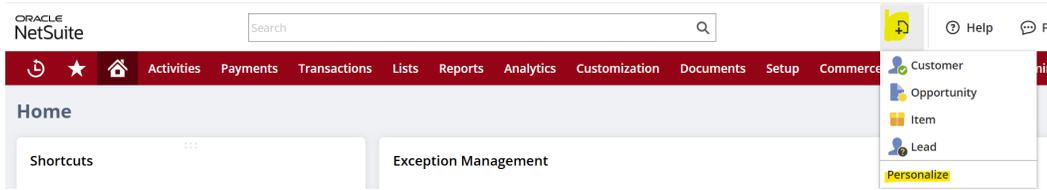
- Clock Icon



Navigation Tips and Tricks - Continued

▲ New Bar Setup Preferences

- Quick Create Records with New Bar Setup Preferences



- Records you create a lot
 - › Customer
 - › Vendor
 - › Items
 - › Opportunity
 - › Saved Search

▲ Quick Add Portlet

- Different Records can set to for what want to create Quickly also

- Personalize Home Dashboard>Quick Add Portlet
 - › Three Dots to Setup which Record want to Quick Add
 - › Example Opportunity
 - › Note – any fields marked “Show” on Main Tab is eligible to Appear in Quick Add.

Navigation Tips and Tricks - Continued

▲ Quick Search Portlet

- Home Dashboard
 - Personalize>Quick Search
 - Search for Dropdown - Let's you pick which record want to perform quick search on
 - › Example – Employee – Search Dean
 - Quickly brings up both employees named Dean
 - › Really Fast and Easy rather than Reports>Saved Searches>Employee>Enter Criteria
 - › **This tip and trick can save 1,000 + Clicks per year**

▲ Entering Data and Completing Forms

- Press and hold Alt and type a letter on a subtab to move to that subtab
 - Example – View Dean Carazza Employee Record
 - If want to go to the Human Resources tab
 - › Alt + Hu – Takes you to Human Resources Tab
 - › Alt + Tim – Takes you to the Time Tracking Tab
- You can use the Space bar as short cut to check/uncheck checkbox field
 - Example – Edit Dean Carazza Employee Record and use spacebar to check/uncheck Project Resource Field in Classification
 - › Need to tab to that field so activates the field without clicking then hit space bar and will see it check /uncheck
- **Performing Calculations in Amount Fields – This one Blows a lot of peoples minds surprisingly**
 - Example – Edit Dean Carazza Employee Record – Can do calculations in the Labor Cost Field
 - › $100,000 \times 1.3 = 130,000$ – note just have to hit tab for it to calculate in that field
 - › **Funny how often myself or see people open calculator when could skip that step and do right within the field!!!!!!**

Navigation Tips and Tricks - Continued

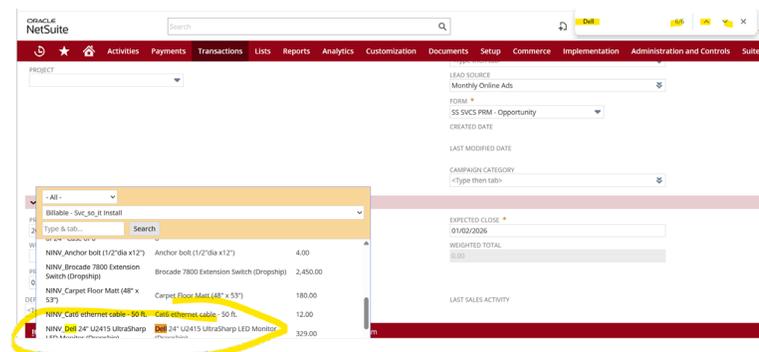
▲ Key Board Shortcuts – You are getting Faster in NetSuite already!!!!

- Bring up a record with date fields to try out – I used an Opportunity record>Expected Close Date Field

- Use “t” to autofill today’s date in date fields
- Use “y” to autofill the previous day’s date in date fields
- Press Shift + t to autofill the following day’s date.
- Type m to autofill the last day of the current month
- Type l (lowercase L) to autofill the last day of the previous month
- Press the + to increase date field by one day
- Press the – to decrease the date field by one day
- Use Ctrl + F to find desired value within dropdown fields without having to scroll
 - › Can go to Items tab

- Click in Dropdown>List

- Can do Ctrl + F – Dell – to see number of results that contain DEL and use up/down arrow to navigate you through those results



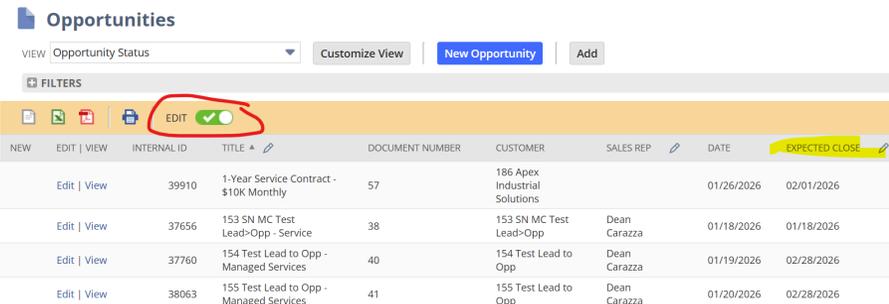
Navigation Tips and Tricks - Continued

▲ Saved Search/List View Page Results – Way Faster than Scrolling!!!

- Can navigate through pages of saved search or list results
 - Select the page dropdown
 - › Then can use page up, page down, home – takes back to first page, end – takes you to last page
 - › Example bring up Sales Orders in List View

▲ Inline Edit multiple rows – Will save you 1,000 + Clicks per year!!!!!!!

- Example – Bring up Opportunities in List View with In-Line Edit Enabled

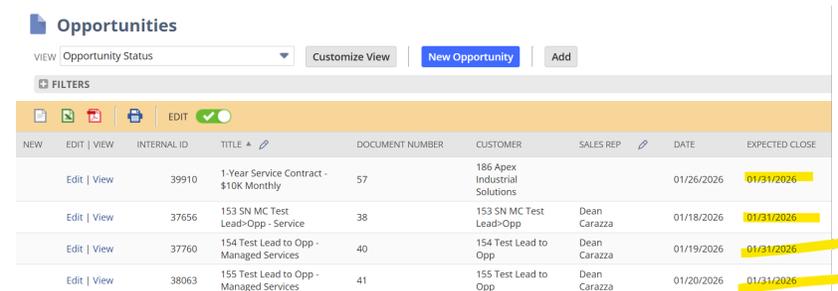


The screenshot shows the 'Opportunities' list view. The 'EDIT' toggle is turned on, indicated by a green checkmark and a red circle. The table below shows four rows of opportunity data.

NEW	EDIT VIEW	INTERNAL ID	TITLE	DOCUMENT NUMBER	CUSTOMER	SALES REP	DATE	EXPECTED CLOSE
	Edit View	39910	1-Year Service Contract - \$10K Monthly	57	186 Apex Industrial Solutions		01/26/2026	02/01/2026
	Edit View	37656	153 SN MC Test Lead>Opp - Service	38	153 SN MC Test Lead>Opp	Dean Carazza	01/18/2026	01/18/2026
	Edit View	37760	154 Test Lead to Opp - Managed Services	40	154 Test Lead to Opp	Dean Carazza	01/19/2026	02/28/2026
	Edit View	38063	155 Test Lead to Opp - Managed Services	41	155 Test Lead to Opp	Dean Carazza	01/20/2026	02/28/2026

- If want to update all these expected close date to end of this month

- Click into the Expected Close Date of First Row
 - › Then holding shift click the last row in the range you want to update
 - › Then update the first row field value to what you want and it will apply to all the rows selected in the range
 - › Used the “m” keyboard shortcut to select last day of this month
 - › Then hit tab for it to take effect to all rows in the range



The screenshot shows the 'Opportunities' list view with the 'EDIT' toggle turned off. The 'EXPECTED CLOSE' dates for the last three rows have been updated to 01/31/2026, highlighted in yellow. A red arrow points from the text in the previous block to the first row's date field.

NEW	EDIT VIEW	INTERNAL ID	TITLE	DOCUMENT NUMBER	CUSTOMER	SALES REP	DATE	EXPECTED CLOSE
	Edit View	39910	1-Year Service Contract - \$10K Monthly	57	186 Apex Industrial Solutions		01/26/2026	01/31/2026
	Edit View	37656	153 SN MC Test Lead>Opp - Service	38	153 SN MC Test Lead>Opp	Dean Carazza	01/18/2026	01/31/2026
	Edit View	37760	154 Test Lead to Opp - Managed Services	40	154 Test Lead to Opp	Dean Carazza	01/19/2026	01/31/2026
	Edit View	38063	155 Test Lead to Opp - Managed Services	41	155 Test Lead to Opp	Dean Carazza	01/20/2026	01/31/2026

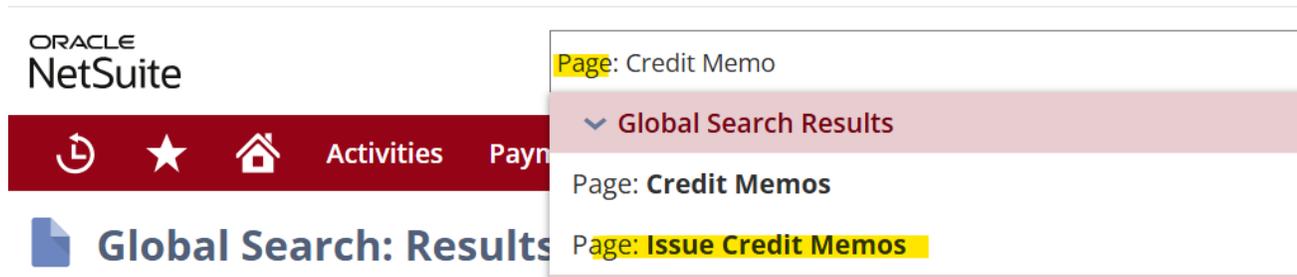
Navigation Tips and Tricks - Continued

▲ Open Tabs in Separate Window – Getting Faster in NetSuite!!!!!!

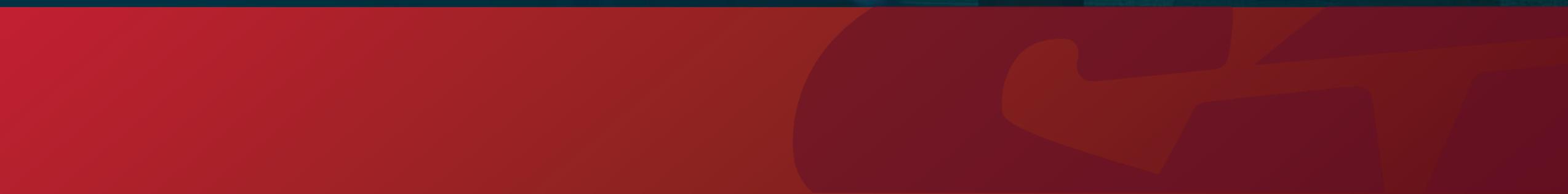
- Click center of scroll on mouse on either view/edit links to open in a new tab
- Example go to list view of customers, can then open a bunch really quickly
 - Can do super fast
 - Bonus Tip – End up with a tone of tabs open, can close them all faster by right click and use chrome close tabs to right

▲ Find Navigation Page

- If can't remember where the navigation path is, you can use Page: in the global search bar
 - Example
 - › Page: Credit Memos – gives you option to view or Issue



Saved Search Tips and Tricks



Saved Search Tips and Tricks

▲ Saved Search – Text Field Filter

- Create Customer Saved Search

- Use our Quick Create from New Bar Setup Path we did for Saved Search
- Ctrl + F to find Customer Topic Saved Search
- Create Saved Search
 - › D Customer
- Results
 - › Add Formula Text Field
 - Case when days overdue >90 then 'D' else '' end
 - Preview
 - Then add Criteria with same formula field set to contains blank space
 - Then add as Available Filter
 - Formula Text
 - Show in Filter Region
 - Label D Customers

Saved Search Tips and Tricks - Continued

▲ Saved Search – Text Field Filter - Continued

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

Standard • Summary

FILTER *	DESCRIPTION *	FORMULA
Formula (Text)	contains	Case when {daysoverdue}>90 then 'D' end

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
Name DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

OUTPUT TYPE
Normal

SHOW TOTALS

RUN UNRESTRICTED MAX RESULTS DISALLOW

MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields •

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL
Name					
Email					
Phone					
Office Phone					
Fax					
Primary Contact					
Alt. Email					
Formula (Text)			Case when {daysoverdue}>90 then 'D' end		D Customer

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Limit the set of filters available on the form when you reuse this search, or to set filters for the results (such as when used as a list view). Remove all filters to use advanced search.

MY PREFERRED SEARCH FORM

HIDE FILTER DROPDOWNS

DEFAULT TEXT FIELD FILTER

starts with

Remove all Add Multiple

FILTER *	SHOW IN FILTER REGION	SHOW AS MULTI-SELECT	LABEL
Formula (Text)	Yes		D Customers

Saved Search Tips and Tricks - Continued

▲ Using Parens in Saved Search Criteria

- For this example we want to easily search up all Customers in the Mfg. Industry with >100 employees or Annual Revenue >=\$5,000,000 and <=\$10,000,000.

Saved Customer Search

List Search Mc

SN Parens Criteria Search

Save & Run Cancel Preview New Template Change ID Actions

SEARCH TITLE *
SN Parens Criteria Search

ID
customsearch2605

OWNER *
Dean Carazza

PUBLIC
 AVAILABLE AS LIST VIEW

AVAILABLE AS DASHBOARD VIEW
 AVAILABLE AS SUBLIST VIEW
 AVAILABLE FOR REMINDERS
 SHOW IN MENU

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to specify criteria that narrow down your search.

USE EXPRESSIONS

NOT	PARENS	FILTER *	DESCRIPTION *	FORMULA	PARENS	AND/OR
	(Industry (Custom)	is Manufacturing)	And
		No. of Employees (Custom)	is greater than 100			Or
	(Annual Revenue (Custom)	is greater than 5000000.00)	And
		Annual Revenue (Custom)	is less than or equal to 10000000.00)	

Add Cancel Insert Remove

Saved Search Tips and Tricks - Continued

▲ Using Parens in Saved Search Criteria –Continued

Criteria **Results** Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY
Formula (Currency) DESCENDING

THEN BY
 DESCENDING

THEN BY
 DESCENDING

OUTPUT TYPE
Normal

SHOW TOTALS

RUN UNRESTRICTED DISALLOW DRILL DOWN

MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL
ID							
Name							
Email							
Phone				When Ordered By Field			
Office Phone							
Fax							
Primary Contact							
Alt. Email							
Industry (Custom)							
Formula (Numeric)			{custentity_esc_no_of_employees}		# of Employees		
Formula (Currency)			{custentity_esc_annual_revenue}		Annual Revenue		

Questions?

Questions

- ▲ Would love to survey and ask for some tips and tricks you may know that were not covered today so we can all learn and collaborate?

Next Steps

- ▲ Follow me and ScaleNorth on LinkedIn. Will be posting the materials from today on our LinkedIn
 - https://www.linkedin.com/mynetwork/discovery-see-all/?usecase=PEOPLE_FOLLOWS&followMember=dean-carazza-cpa-5b511553
- ▲ Group “NetSuite Made Easy”. Material from prior classes are posted out there as well. Can request to join group using link below
 - <https://www.linkedin.com/groups/14571179/>
- ▲ Will be hosting monthly with next one TBD
 - Topic TBD
- ▲ If you have any NetSuite pain points, enhancements, integrations or any questions we would be happy to setup a quick chat and see how we can help
 - Send me an email or give me a call or grab time on my calendar
 - dcarazza@scalenorth.com
 - 714-350-6211
 - <https://calendly.com/dcarazza-1>



NetSuite Consulting, Implementation and
Outsourced Accounting Services

THANK YOU!

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