

BPM

Maximizing the Power of NetSuite to Manage Business in Real-Time

April 23, 2020

10:00 am – 11:00 am PT

Our Speakers



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Safe Harbor Statement

The following is intended to outline general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Fast Facts

BPM at a Glance

40+ Partners

500+
Employees

Founded **1986**

Services

Advisory
Audit
Corporate Tax
Employee Benefit Plan Audits
High Net Worth
International Tax
IT Assurance
Risk Assurance
SEC Compliance

Industry Knowledge

Consumer Business

Financial Services

Life Science

Nonprofit

Private Client Services

Real Estate

Technology

Locations

San Francisco
Menlo Park
Walnut Creek
San Jose
Santa Rosa

St. Helena
Cayman Islands
Bengaluru
Eugene

Orange County
Stockton
Seattle
Fairfield

One of the 50 largest public
accounting and advisory
firms in the country.



Webinar Overview

Webinar Topics

- Dashboard Basics, Navigation & Terms
- Extending Your Dashboard
- Publishing & the Custom Dashboard

What Should I Expect to Learn

- How to navigate and change what I see on my home dashboard
- How I can modify an existing dashboard portlet
- How I can add something new to my dashboard
- How my team members can share the same dashboard (and how to control what they see)
- Where I can get additional assistance in setting up my dashboard

Dashboard Basics, Navigation & Terms

- Based on user and role
- Every tab has a dashboard
- Changing the “layout”
- “Portlets” can be added, moved, removed and collapsed
- Drilling down to details
- Customizing/editing an existing Portlet
 - Refreshing
 - How to know what portlet type is in use
 - Set Up or Edit
 - Changing the “View”
- Adding/restoring a portlet using “Personalize”

NetSuite Demo

Extending Your Dashboard

- Personalize
 - Many different portlet types
 - Number restriction
- Adding a custom Saved Search to your dashboard
- Shortcuts and the Navigation Shortcut Group
- To add or not to add Recent Records, Shortcuts, Quick Add & Quick Search
- Custom tabs
 - Why this is important
- Publishing
 - Sharing with others

Q&A

Resources

- BPM TSG NetSuite Team
 - Log a ticket with us: [Zendesk Support Center](#)
- [NetSuite Help Center](#) (requires NetSuite login)
- [SuiteAnswers](#) (requires NetSuite login)
- Blog - [Six Steps to a Success-Oriented Dashboard](#)

Thank You!