

One Page Quick Reference: NetSuite Basics for Brokers

HELP! Email questions & issues to support@cgsquared.com

Documents at www.i-TPM.com/training-resources.com

iTPM

iTPM Overview

Setup ▶

Promotions ▶

Deductions ▶

Resolutions ▶

Help ▶


Login to access iTPM

1. Go to www.NetSuite.com.
 - a. The first time you go to this web page, **click on Log in** at the top right corner.
 - b. After the first time NetSuite will go directly to the login screen
2. Enter your email address and password.
3. Look for **iTPM** on the main control tab menu.

Change your password

- Go to the home page.
- Look for the **Settings Portlet**
- Click on **Change Password** and follow directions.


Setup challenge questions BEFORE you forget your password.

- Go to the home page. Look for the **Settings Portlet**  (Scroll down to find this portlet.)
- Click on **Update Security Questions**, enter your password, Select and answer three questions, then click **SAVE**.

Helpful Suggestions for using NetSuite

- Be patient. [Wait for the browser](#) spinning wheel to stop before you click on your web page
- [Wait for the form to completely load](#).
- [Avoid using the browser's back arrows](#). Instead, try to use the buttons and links in the web page
- [Slow? What's taking so long?](#) Double click on the Oracle logo, or go to <https://status.netsuite.com>
- [VIEW promotions to see the workflow](#) You will only see workflow buttons when you VIEW things.
- **Help, I'm lost!** Just go back to the [iTPM main menu](#), or go back using [recent records](#).
- [Save time using the LIST and ARROW links](#) when viewing a promotion, settlement or deduction.

Time saving features in NetSuite

- **Recent Records:** Hover over the recent record icon  in the upper left of your screen. Simply click on anything in the list to go back and open these records that you viewed or created.
- **Input Fields:** Type in a few letters in any free-form data entry field and let NetSuite find what matches. i.e., type in ALB, to find Albertsons / Safeway
- **Save options:** **Save** saves your data and returns you to the previous form. **Save and New** saves your data, and gives you another blank form. **Save and Copy** saves your data, and copies data from your last form to save time. One of these options may save you time when entering data.
- **Entering Dates:** You can **enter a "T" for today's date**, and a **"Y" for yesterday's date**. **"+" advances one day**, **"-" goes back one day every time you enter it**. If you need other dates, you can use the calendar icon, or just type in the date.
- **Open links in new tabs:** You can directly click on links to drill-down into your data. If you want to see that data AND keep your place on the current form, just *hover* over the link, *right-click*, and select *"Open link in new tab"*.

[List views, Dashboards, and forms can be customized in NetSuite.](#) (If your role has the permissions)