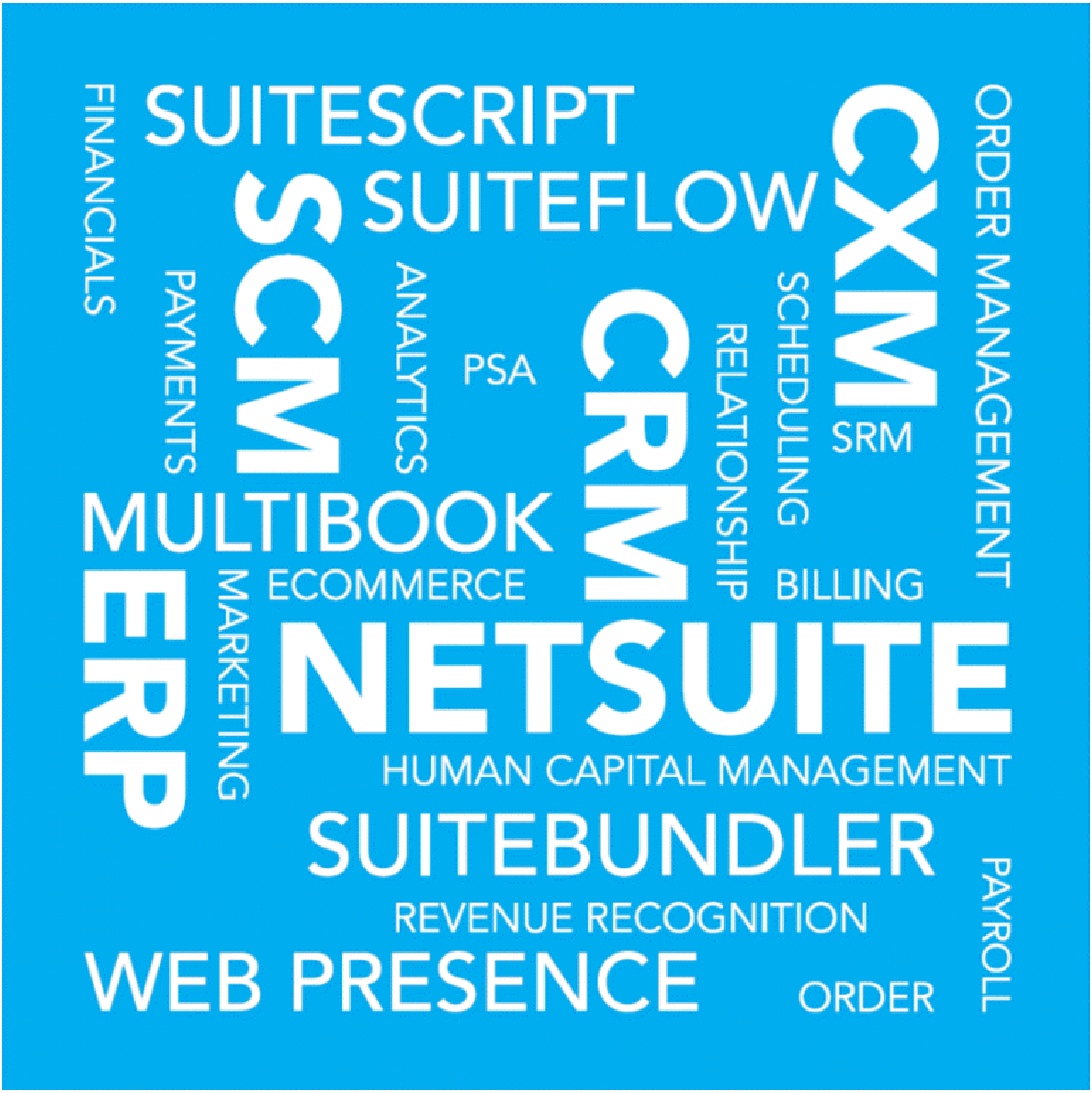
# Creating StickyNotes on Record Pages




July 17, 2019 2019.2

and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Master Agreement, Oracle License and Services Agreement, Oracle PartnerNetwork Agreement, Oracle distribution agreement, or other license agreement which has been executed by you and Oracle and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

**Sample Code**

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and "as available", for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

**No Excessive Use of the Service**

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

**Beta Features**

Oracle may make available to Customer certain features that are labeled "beta" that are not yet generally available. To use such features, Customer acknowledges and agrees that such beta features are subject to the terms and conditions accepted by Customer upon activation of the feature, or in the absence of such terms, subject to the limitations for the feature described in the User Guide and as follows: The beta feature is a prototype or beta version only and is not error or bug free and Customer agrees that it will use the beta feature carefully and will not use it in any way which might result in any loss, corruption or unauthorized access of or to its or any third party's property or information. Customer must promptly report to Oracle any defects, errors or other problems in beta features to support@netsuite.com or other designated contact for the specific beta feature. Oracle cannot guarantee the continued availability of such beta features and may substantially modify or cease providing such beta features without entitling Customer to any refund, credit, or other compensation. Oracle makes no representations or warranties regarding functionality or use of beta features and Oracle shall have no liability for any lost data, incomplete data, re-run time, inaccurate input, work delay, lost profits or adverse effect on the performance of the Service resulting from the use of beta features. Oracle's standard service levels, warranties and related commitments regarding the Service shall not apply to beta features and they may not be fully supported by Oracle's customer support. These limitations and exclusions shall apply until the date that Oracle at its sole option makes a beta feature generally available to its customers and partners as part of the Service without a "beta" label.

# Table of Contents

# Creating StickyNotes on Record Pages

StickyNotes lets you attach notes to record pages and keep track of your notes as well as others' replies. You can communicate effectively with others by adding recipients to ensure that only specific people have access to your notes. Recipients are notified through email when you tagged them in a note, or when replies are added to the note. You can also make your note public if you want to make it visible to everyone with access to the record page.

With StickyNotes, you can highlight important information or critical action items on a record by defining custom color notes. See Customizing StickyNotes from Record Pages for more information. You can also call attention to a specific note on a record page by snapping the note to a field. See Adding a New Note for more information.

## Using StickyNotes

The StickyNotes toolbar appears at the top of a record page when it has been enabled on that record. From the toolbar, you can add a note, set preferences, and open the StickyNotes Board. If there are existing notes on record pages, you can also filter them based on priority by clicking on the priority colors on the StickyNotes toolbar.

> **Note:** If you do not see the StickyNotes Toolbar, it may be disabled on the record you are viewing. Contact your account administrator to have StickyNotes enabled on the record page.

Read the following topics for more information on how to use StickyNotes:

- Understanding StickyNotes Actions and Icons
- Adding a New Note
- Deleting Notes
- Customizing StickyNotes from Record Pages
- Navigating the StickyNotes Board

### Understanding StickyNotes Actions and Icons

#### StickyNotes Actions

When viewing notes on a record page or the StickyNotes Board, you can point to the note to display the Actions menu on the upper-right corner. From the **Actions** menu, you can do any of the following:

> **Note:** Some of these actions are not available when you view the note from the StickyNotes Board.

- **Mark as Done** – Crosses out the note content to indicate that action items have been completed. Anyone with access to the note can mark the note as done.
- **Reply** – Opens a new reply note. Type your message in the space provided. Anyone with access to the note can send a reply.
- **Expand Replies** – Expands notes to view all replies.
- **Compile Replies** – Collapses note replies.
- **Delete Note** – Deletes the current note. You can only delete notes you created.

- **Archive Note** – Archives the current note. Archived notes will no longer appear on the record page, but they can still be viewed on the StickyNotes Board. You can only archive notes you created.

### StickyNotes Icons

Icons are displayed at the bottom of the original note to indicate if the note is public or private, or if it has replies and attachments.

| Icon | Description |
|---|---|
| | This icon indicates that there are replies to the note. |
| | This icon indicates that the note is private. Only the note owner and recipients can view private notes. |
| | This icon indicates that the note has been set to public. Everyone with access to the record page can view public notes. |
| | This icon indicates that a file is attached to the note or to its replies. |

## Working with StickyNotes on Record Pages

Notes on the record page lets you highlight important information or track pending tasks related to the record. You can also add supporting documents or related files as attachments to the note you are creating or replying to. For more information on supported file types, see Supported File Attachments for StickyNotes.

Depending on your account configuration, StickyNotes may be carried over when a record is transformed into another record type. For example, if you generate an estimate from an opportunity record, the notes on the opportunity record will be carried over to the estimate record. Notes attached to specific fields on the opportunity record are not included. Notes added to the estimate record will not be available on the opportunity record.

### Supported File Attachments for StickyNotes

You can drag and drop a file to a note to add it as an attachment. The following table shows the file types and the corresponding icons that will be displayed on the note:

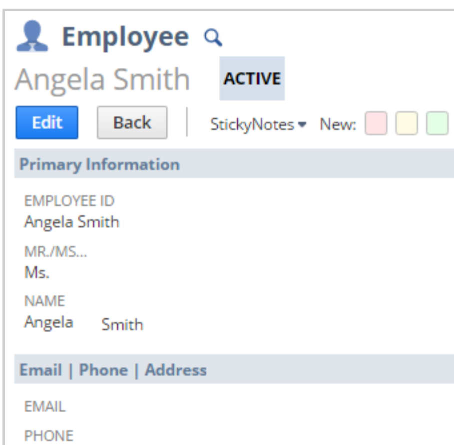
| Icon | File Type |
|---|---|
| | HTML files |
| | XML files |
| | Excel files |
| | Word documents |
| | Powerpoint presentations |

| Icon | File Type |
|---|---|
| | Text files |
| | Unknown file types |
| | PDF files |
| | Compressed file types (.zip and .rar) |
| | Image files<br>**Note:** This icon is displayed for JPG, JPEG, PNG, and BMP image files when the option to preview images is not enabled. Other image files are displayed as an icon with a link to the attached file. |

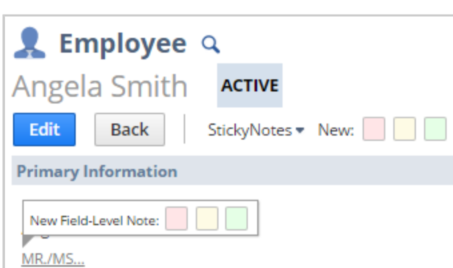
## Adding a New Note

### To add a note to record pages:

1. Open the record page where you want to add a note.
2. From the StickyNotes Toolbar, click on any of the note icons to create a new note.



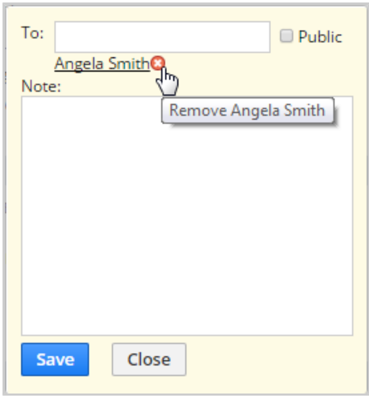

Alternatively, you can also add a note to specific fields. Point to the field label and, on the tooltip that appears, select the note that you want to create. Field-level notes will be displayed below the field where it is currently attached. If the field is hidden, the note will be displayed on the upper right portion of the page.






ORACLE NETSUITE

3. A new note window appears. To add the note to a field or record page, do the following:




   a. In the **To** field, you can enter recipient names to make the note visible to specific people or leave the field blank to make the note visible only to you.

      Recipients will receive an email notification when they are tagged in a new note and when replies are posted on the note.

      > **Note:** Auto-complete suggestions will appear when you type partial characters of the first or last name.

   b. To remove a recipient, pont to the recipient's name, and then click the delete icon that appears.
   c. Click the **Public** box to make the note visible to everyone with access to the record.
   d. Type your message in the space provided.
   e. To add file attachments, drag and drop a file to the note.
   f. Click **Save** to attach the note to the record.

      > **Note:** Icons on the note indicate if the note is public or private, or if the note has replies or file attachments. For more information on note icons, see StickyNotes Icons.

## Replying to a Note

You can reply to a note by going to the record page where the note is attached or by replying to the notification sent to your email. You will receive an email notification for replies added to notes if you are the note author, recipient, or you have previously replied to the note.

> **Note:** Supported email applications only include iMail (on Mac and mobile), Outlook, and Gmail.

### To reply to a note on a record page:

1. Open the record where the note is attached.
2. Point to the note to display the Actions menu, and then click **Reply**.
3. Type your message on the space provided.
4. If you want to attach files to your reply, drag and drop a file to the note.
5. Click **Save** to add your reply.

## Deleting Notes

### To delete notes and replies:

1. Open the record page where the note is attached.
2. Point to the note to display the actions menu. Do one of the following:
   - To delete the original note, click **Delete Note** from the Action menu.
   - To delete replies, click **Expand Replies** from the Action menu. Point to the reply that you want to delete, and then click the delete icon that appears on the upper right corner of the note.
3. On the confirmation window that appears, click **Yes**.

## Customizing StickyNotes from Record Pages

### To customize notes from the record page:

1. Open any record page where StickyNotes is enabled.
2. From the StickyNotes Toolbar, click or point to the **StickyNotes** dropdown menu, and then select **Preferences**.

   > **Note:** You can also set your preferred font and note size from Setup > Customization > StickyNotes Setup.

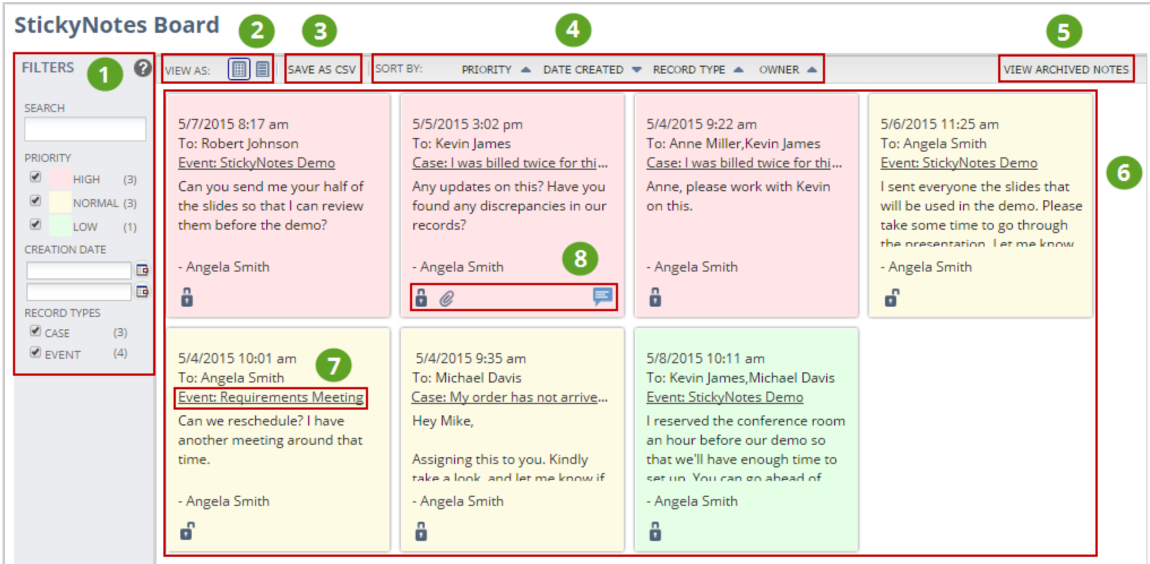
3. In the StickyNotes Preference window, you can do the following:
   - Change the colors for high, medium, and low priority notes by choosing from predefined color sets or by entering the hexadecimal color value.
   - Set the font and note size.
   - Click **Reset to Default** to restore the default StickyNotes preferences defined by your administrator.
   - Check the **Hide Notes** box to hide notes across record pages. When this setting is enabled, a pop-up alert will notify you about the hidden notes the next time you load the record page.
4. Click **Save**.

# Navigating the StickyNotes Board

The StickyNotes Board is a convenient location from where you can view notes (both active and archived) across record pages. The board displays notes that you have created and received. Public notes will not be displayed if you are not tagged as a recipient.

> **Note:** The board can display the most recent 100 active and 100 archived notes.

Go to Lists > Productivity > StickyNotes Board. Alternatively, you can also access the Board from the StickyNotes toolbar in record pages.




The following table lists the UI elements of the StickyNotes Board and their corresponding descriptions:

| | UI Element | Description |
|---|---|---|
| 1 | Display Filters | Define display filters to show only notes that match the specified criteria.<br>■ **Search** – Type a keyword in this field to search for it within messages, recipient, and owner.<br>■ **Priority** – Select the note priority that you want to display on the board. The number of notes per priority is indicated in the parenthesis.<br>■ **Creation Date** – Enter a start and end date to display notes within the specific period. If no end date is provided, StickyNotes will display notes starting from the specified start date up until the present date.<br>■ **Record Type** – Select a record type to display notes created or accessible on specific record pages. The number of notes per record type is indicated in the parenthesis.<br>Historical notes also appear on record types where they are accessible. For example, notes from estimate records are carried over to opportunity records. When you filter notes by record type, the historical notes will be displayed when you select opportunity, estimate, or both. |
| 2 | View Options | Select whether to view your notes in a list or grid. |
| 3 | Save as CSV | Click here to generate a CSV file of all the notes, including its replies, that match the filter criteria. You can still access note attachments from the CSV file using a link to the file location. |
| 4 | Sort Options | You can sort notes based on multiple criteria. To change the sorting priority, drag a sorting field to the left. The left-most option takes precedence over the others. You can click on the sorting fields to change the sorting order (ascending to descending, and vice versa).<br>For example, you set the sorting to: Priority, Owner, Record Type, and Date Created. The notes will be arranged by Priority, and then by Owner, and so on. If you click the Priority option, the order of the notes will be arranged from high priority to low priority, or vice versa. |
| 5 | Archive View | Click here to view archived notes. |
| 6 | Notes Pane | Notes are displayed in this section of the page. Depending on the view option you selected, the notes may be displayed in a list or grid. |

| | UI Element | Description |
|---|---|---|
| 7 | Record Page Link | Click this link to go to the record page where the note is attached.<br>For historical notes, the record page link redirects you to the record where the note was originally created. |
| 8 | Note Icons | Icons displayed at the bottom of the original note indicates whether the note is public or private, or if it has replies or attachments. For more information, see StickyNotes Icons. |