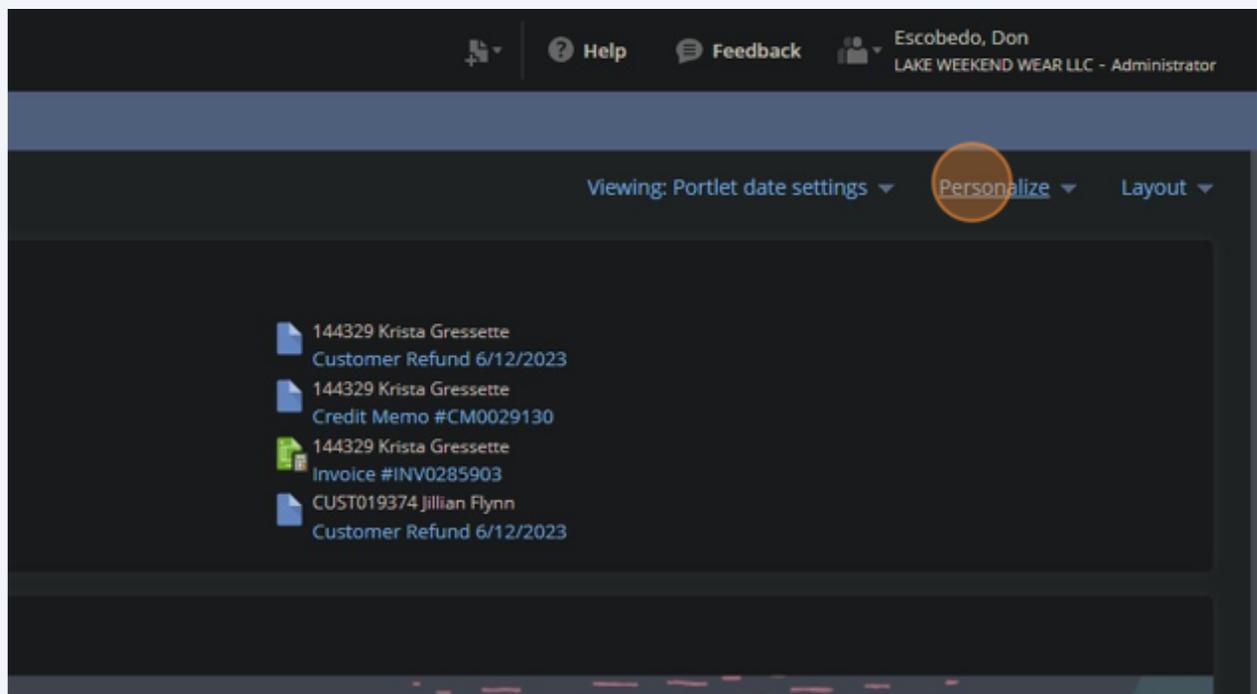# NetSuite's Reminders Portlet & You

This guide shows the user how to add the Reminders portlet to the home page as well as how to add reports to the Reminders portlet to expedite actionable workflows.
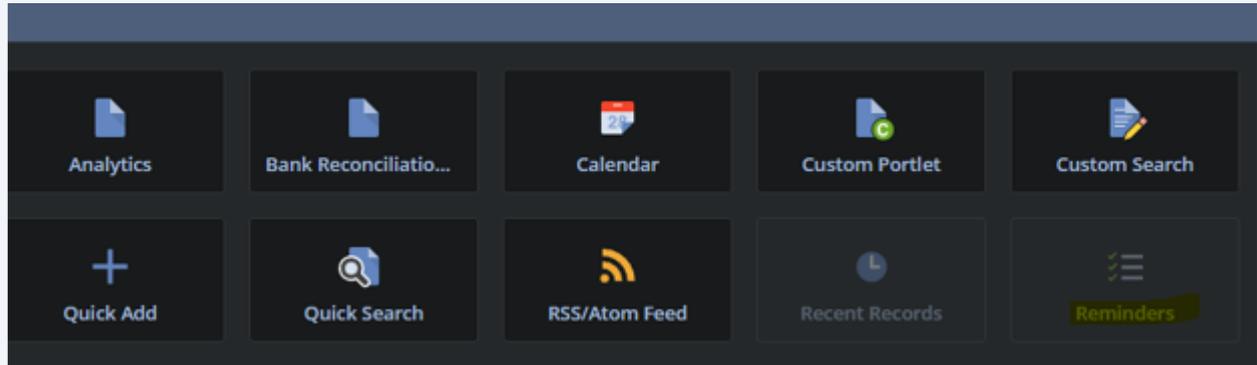
1 Navigate to 4816234.app.netsuite.com/app/center/card.nl?sc=...
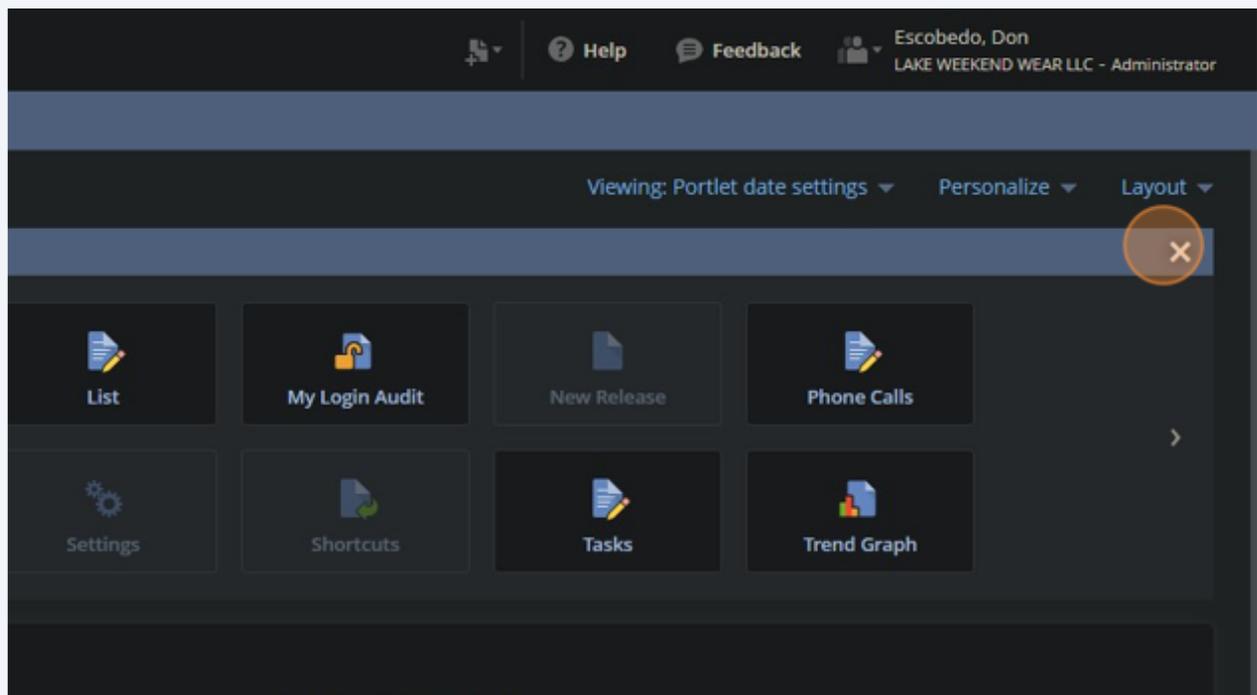
2 Click "Personalize"

3 If you do not already have the Reminders added, you will be able to select it from the portlet options as seen in this screenshot. If you already have the Reminders portlet, the icon will be greyed out like in the below screenshot.
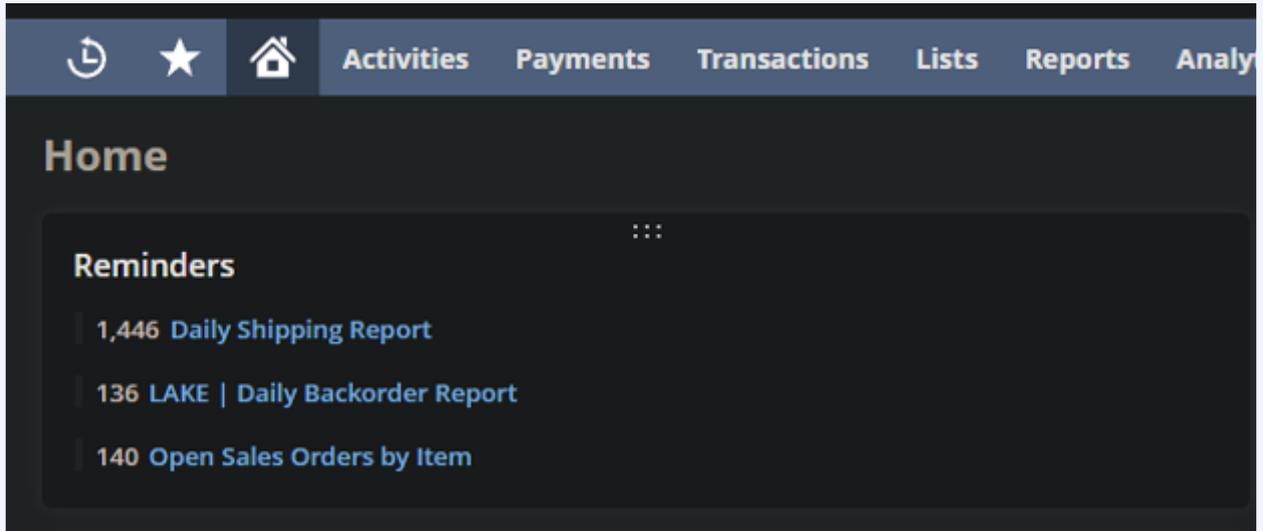

4 Once you have added the Reminders portlet, Click "×" to close the Personalize menu.
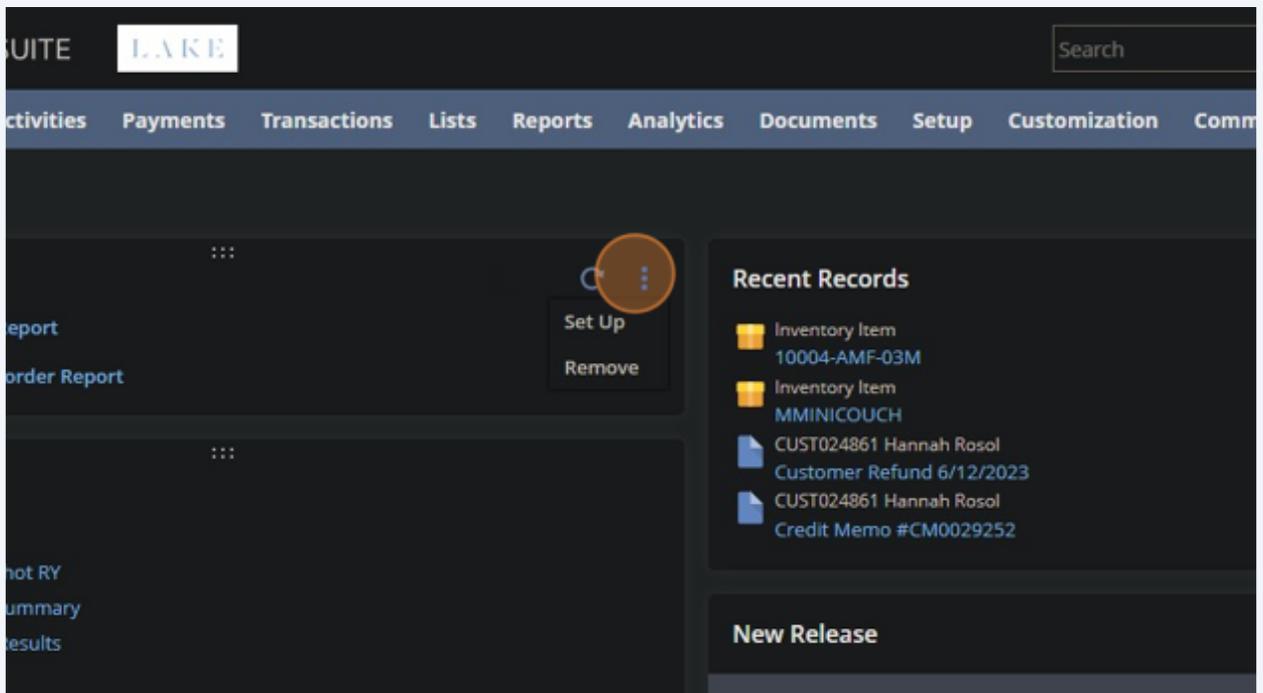
5 You should now see the Reminders portlet on your home screen (by default it will usually be placed at the top left hand corner).
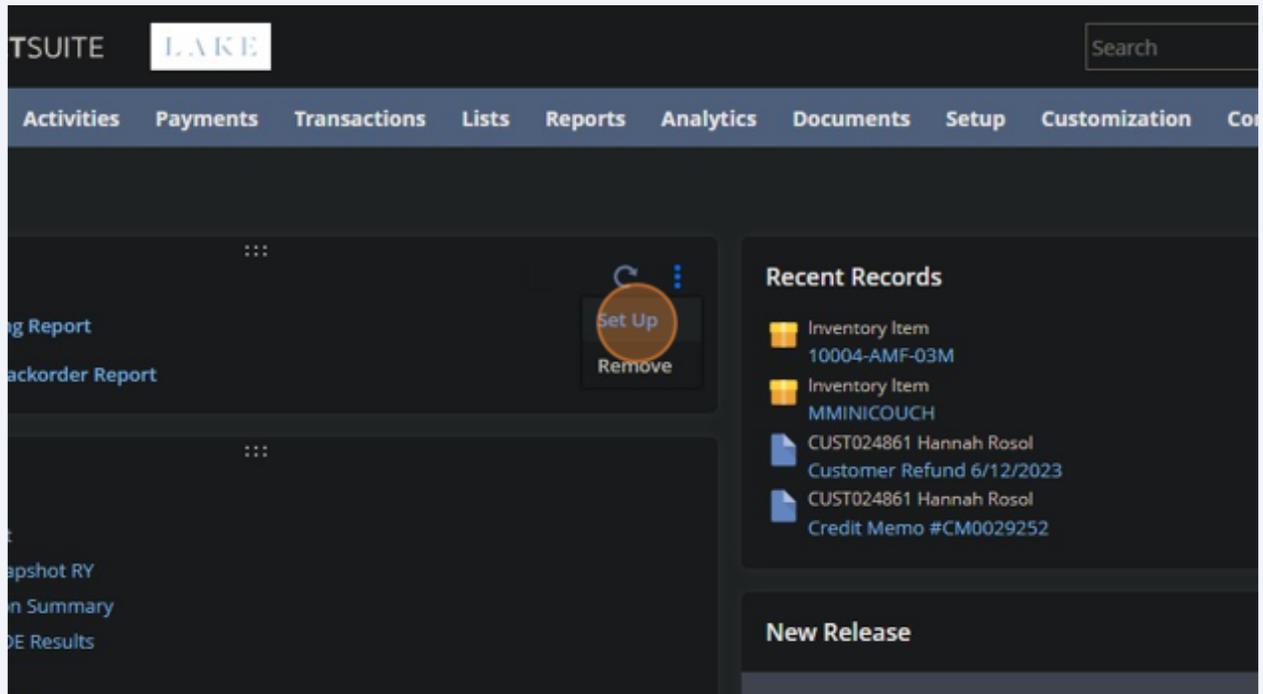

6 Now, we will want to setup our Reminders portlet. To do this, hover your mouse over the 3 vertical dots at the top right corner of the portlet. You will see a small menu pop up.

7 Click "Set Up"

8 After clicking Set Up, you will have a larger window pop up that will have two primary columns. On the left hand side, you will see all reports and searches that are available to add to your Reminders Portlet. Conversely, on the right, you will see all Current Selections that will be included once you finalize your set up.
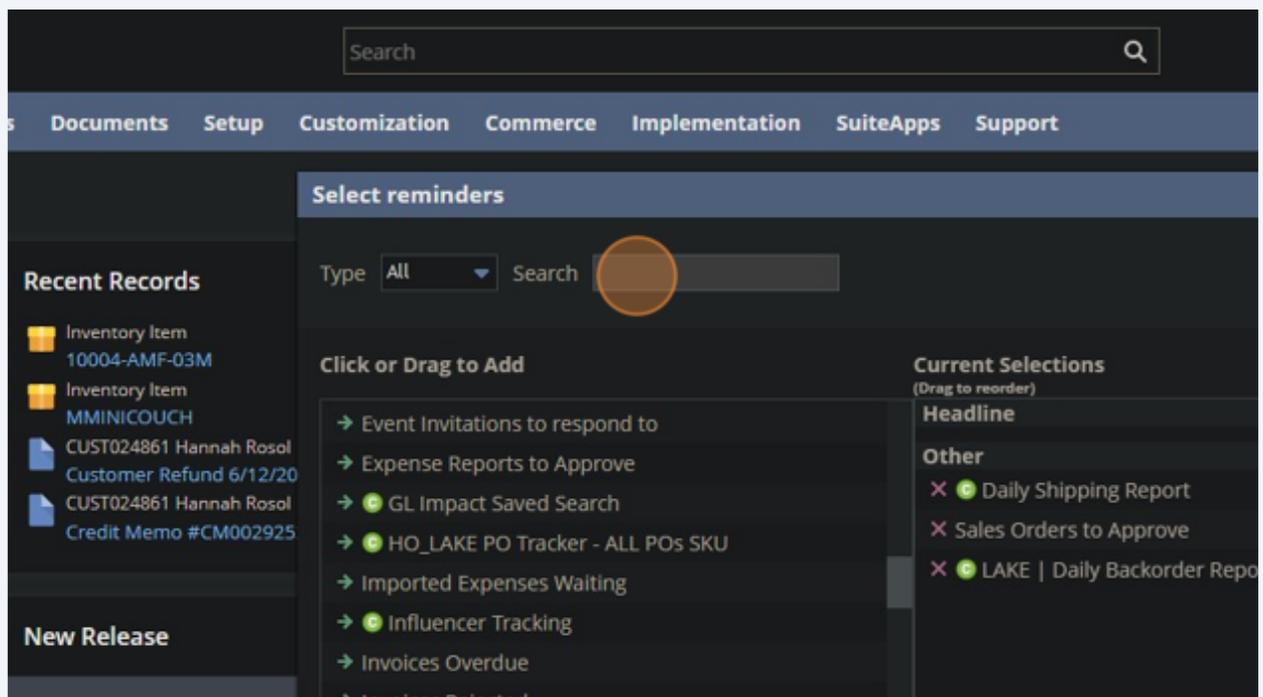
9

To search by keyword or term, click on the search box at the top of the Select reminders pop up. Then begin typing any terms or keywords included in the name of the desired search or report. For Example, I want to add the scheduled Item Change searches to my reminders - I should type in "Item" to help filter down the list.
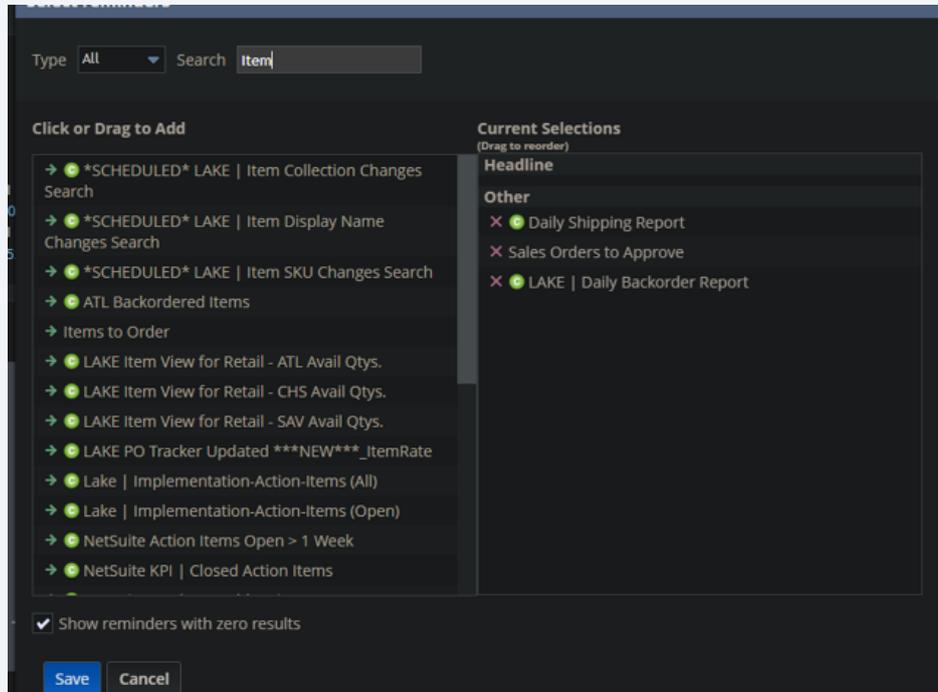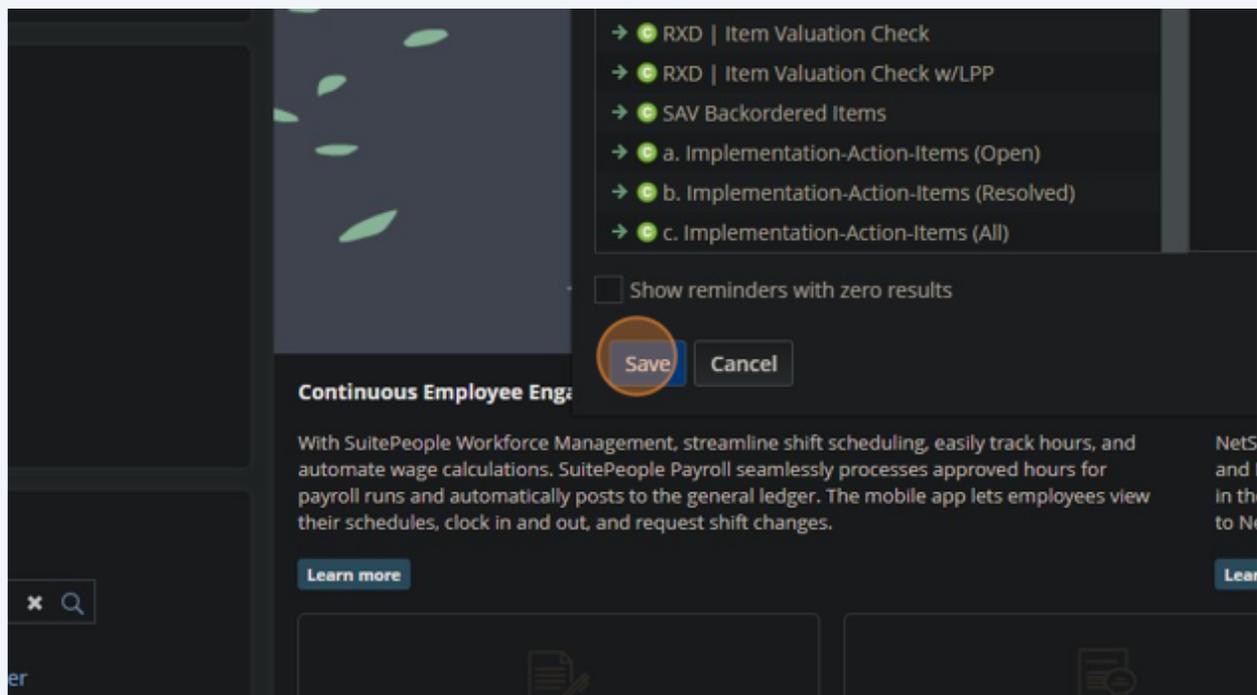
10 Once you have located the desired search, click on the title in the left hand column. This will place it in your Current Selections on the right hand side.
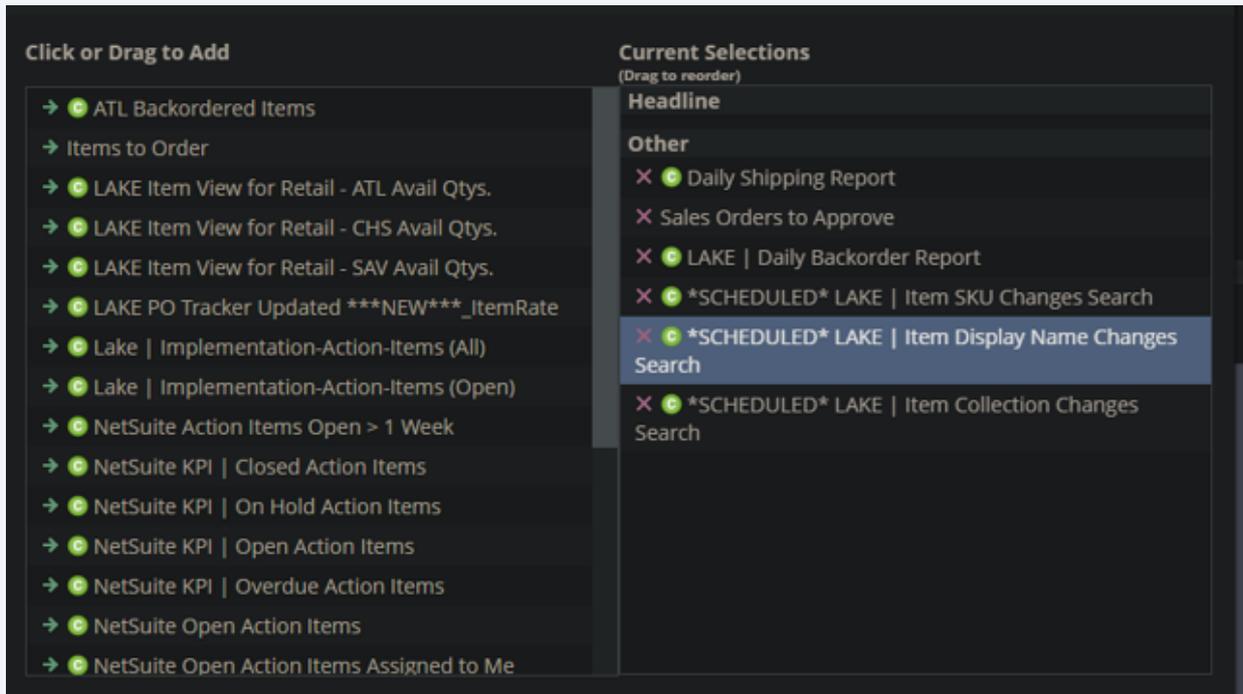
11 Once you have finalized the reports and searches you would like to see in your Reminders Portlet, please select "Save" at the bottom left hand corner of the pop up screen.

12 After selecting Save, you should now see all desired selections in the Reminders Portlet. Please note that you can "refresh" the results of the reminders without having to run each search/report individually. To do this, hover your mouse towards the upper right hand corner of the Reminders Portlet until you see a Refresh (Circle Arrow) symbol appear. Click on the symbol to refresh all reminders!