NetSuite Customer Portal Training

Document Number	MRKT-10	Version	2
Document Owner	Management	Department	Management
Site	All		
Document Type	Marketing		

1 Objective

1.1 This document will be used as a training guide to help Steri-Tek customers on how to access and utilize the Steri-Tek ERP customer portal.

2 Scope

2.1 Customers need to have access to the customer portal to update customer contact and shipping information, enter orders, review orders and documentation, review invoices, and access current and historical reports.

2.2 Responsibilities

Owner	Responsibility
Management	Keep this document up to date with any changes that happen within the customer portal in the Steri-Tek ERP system.

2.3 Table of contents for section 4

3 Definitions

3.1 Service Order (SVO) – A Customer's order to Steri-Tek

3.2 Product Processing Specification (PPS) – A document created by Steri-Tek and approved by the customer on how to process a specific validated product.

3.3 Invoice (INV) – The transaction created from Steri-Tek to notify the customer of the price of an order.

4 Instructions

4.1 Granting Access

4.1.1 Customers must be given access to their customer portal from Steri-Tek. Once access has been granted, they may log into their Company account.

4.1.2 Steri-Tek will initially give one contact (Representative) at a company access to the customer portal. Customers will notify Steri-Tek of the Representative via a Customer Contact Sheet found on Steri-Tek's website. Email the Customer Contact Sheet to quality@steri-tek.com.

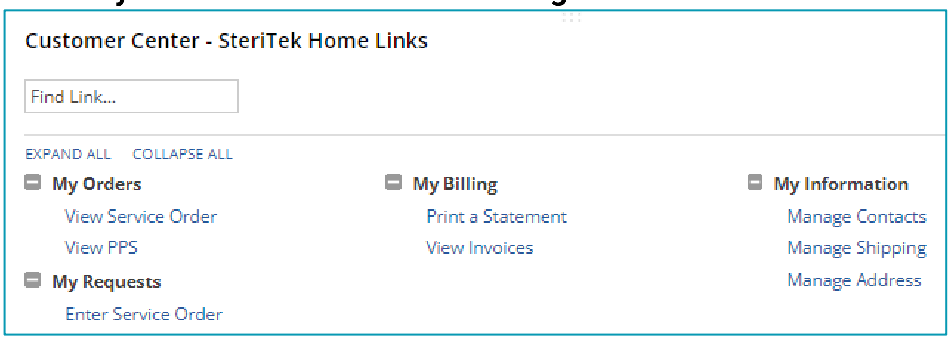
4.1.2.1 Once the Representative has been given access, they can add more contacts to the account. To add additional contacts, go to Section 4.2.

4.1.3 Once additional contacts have been added to the account, a request to gain access can be made by emailing Steri-Tek with the name(s) of contacts requiring access. Steri-Tek will activate their access, and an email will be sent to the contact with login setup instructions.

4.2 Managing Contacts

4.2.1 Once customers have access to their portal they can manage their own contacts, shipping addresses, and third-party shipping information.

4.2.2 Go to **My Information** and select **Manage Contacts.**

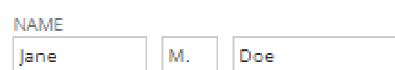


4.2.2.1 A list of all current contacts will be shown and the **Login Access column** displays whether or not they have access to the company's customer portal.

4.2.3 To enter a new contact, select 

and enter information described below.

4.2.3.1 **Primary Information**



- *Enter First, Middle (optional), and last name under **Name. Contact** field will auto-populate.*
- *The **Company field will auto-populate.***
- *Enter the **Subsidiary** the contact will interact with (i.e., Steri-Tek (Dallas) or Steri-Tek (Fremont))*
- *Enter contacts **Job Title***
- *Select the contacts **Role** via the drop-down menu*

4.2.3.2 **Email | Phone | Address**

- *Enter contacts **Email***
- *Enter contacts **Main Phone** (primary)*

4.2.4 Review information and select **Save.**

4.3 Managing Addresses

4.3.1 All shipping addresses used for orders, including research laboratories, must be added to **Manage Address.**

4.3.2 Under **My Information** in **Manage Address** page, all current addresses are available to view or edit.

4.3.2.1 The address label will be generated from the **Address 1** field. This label will be shown when selecting addresses in the Service Order.

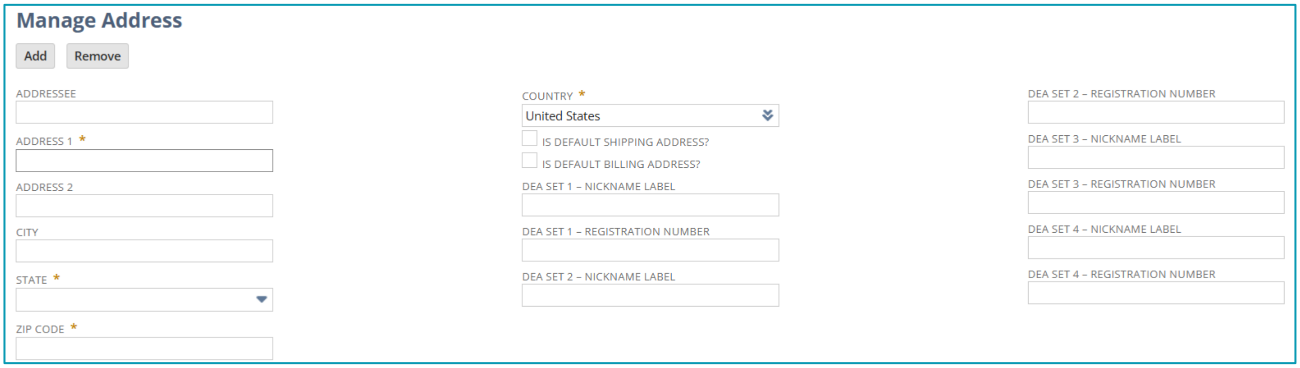
4.3.3 To add an address, fill out **Address 1**, **City**, **State**, **Zip Code,** and **Country** fields.

4.3.3.1 **Addressee** and **Address 2** are optional fields

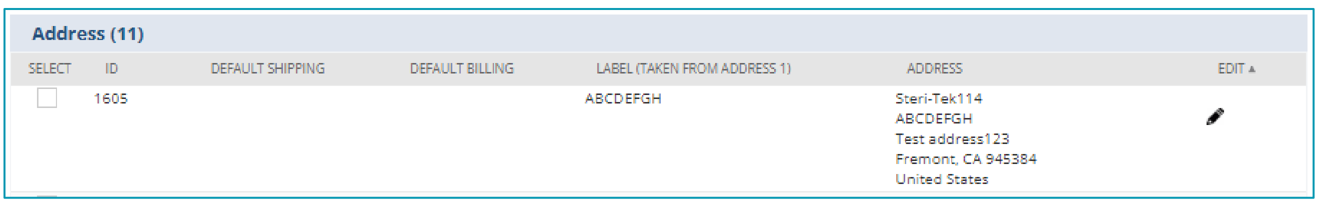
4.3.3.2 Provision has been made for companies working with DEA related products to enter up to 4 DEA numbers, each with their own nickname (for easy recognition). Any company with a DEA registration and sending DEA product for service will need to enter at least one DEA number.

4.3.3.3 Select the checkboxes if the address is default for shipping and/or billing.

4.3.3.4 Select **Add** button.



4.3.4 To remove an address from the **Address** list, select the address checkbox and click the **Remove** button.



4.3.5 To edit, select the pencil icon next to the address. **Edit Address** window will pop up where one can edit fields and select **OK** when complete.

4.4 Managing Shipping Accounts

4.4.1 Under **My Information** in **Manage Shipping** page, all current shipping accounts are available to view or edit.

4.4.2 To add an account, select **New Shipping Carrier / Account Number**

4.4.2.1 Note, an shipping account number can be used for any address.

4.4.3 To inactivate an account number, select **Edit** and click the **Inactive** checkbox**.**

4.5 Placing an Order

4.5.1 Prior to entering an order, ensure that necessary contacts, address, and shipping account information are entered in the customer portal. This information cannot be entered during initiation of service order without losing one's progress.

4.5.2 Refer to MRKT-11 *NetSuite – Submitting a Service Order* for instructions on how to place an order.

4.5.2.1 It is preferred that the SVO is entered before the product is shipped to streamline the process.

4.6 Managing Invoices

4.6.1 Under **My Billing**, select **View Invoices** to view list of current and previous invoices. Select **Print** to PDF of invoice.

4.6.2 A statement based on a date range can be generated by selecting **Print a Statement** under **My Billing**.

4.6.2.1 Select the **Subsidiary,** enter date range and select **Print**. Note: If you send product to multiple Steri-Tek facilities, they will be charged separately.

4.7 Tips and Tricks of NetSuite

4.7.1 To find out more about what a particular field is for, click the field name and a tool tip will appear with additional information.

4.7.2 When picking from a drop-down menu, one can start typing into the field and available options will pop up and be selectable.

4.7.2.1 If there is only one available option, pressing "tab" after a few letters will automatically choose the selected option.

5 Appendix

5.1 None

MRKT-10 (DOC-1905) Ver. 2

Approved By:

(CO-2822) Updates to NetSuite documents due to the changes held under Phase 1 Feature Release 1

Description

Updates to NS-FORM-1: Radiation Type has been added to the first page of the SVO for Routine-Validated order types. Min Dose and Max Dose has been updated to include external; Shipment ID field has been added to the Shipment Details section of the Routine-Validated SVO. The Routine Non-Validated SVO updates include the same changes as the Routine-Validated SVO as well as additional fields in the Processing Information section which includes: Radiation Type, Dosage Form, Pre and Post processing dwell time and conditions and updated dosages to include the word external or Ext. Updates to Return Shipping Information - Location 3 with all contact fields. The Non-Routine - Validated SVO updates include adding Radiation Type and Shipment ID, as well as external dose terminology. The Non-Routine - Non-Validated SVO share the same changes as the Non-Routine - Validated SVO. Updates to MRKT-10: Changed the version number to 2. Table of contents has been updated to include 4.2 Managing Contacts, 4.3 Managing Addresses and 4.4 Managing Shipping Accounts. Section number "4.1" has been included as it was not added in previous CO. Section 4.2.2.1 has been updated to explain that Login Access column will still display whether or not customer has access to their customer portal. Section 4.2.3.1 has been updated as the primary information - company field will now be auto-populated. Section 4.3.3.2 has been updated to explain that companies working with DEA products will be able to enter up to 4 DEA numbers (each with their own nickname) but, 1 DEA number will be required for product service. Section 4.4.2 has been simplified to avoid redundant instructions already listed in section 4.3. Section number "4.5" has been included as it was not added in previous CO. Section number "4.6" has been included as it was not added in previous CO. Section number "4.7" has been included as it was not added in the previous CO. Section 4.7.1 has been updated to clarify that the customer may click the field name and tool tip to find more information. Updates to MRKT-11: Changed the version number to 1. Updated the Complete SVO - Main Section by adding step 6 which explains the Reason text area that is displayed and clarifies that Steri-Tek will be filling in this field if any issues need resolving. Updated Routine - Non-Validated PPS step 9 by specifying environmental conditioning for Pre or Post processing or both. DEA Information section has been updated to include DEA Schedule, Dosage Form, and DEA ARCOS/YERS Reportable fields. Location & Contacts section updated step 2 to specify entering a shipping account number or info for third party shipping and shipping method. Updates to MISC-39-1: The new role of QC Management has been added. Customer Success role now has permissions to reject and send to customer input for SVO approval workflow. Permissions have been updated to control/align with current NetSuite settings. Initial Release of WI-103 NetSuite Maintenance Release to define the Maintenance Release ensures controlled implementation.

Justification

Updating NS-FORM-1 to align all Routine-Validated, Routine Non-Validated, Non-Routine - Validated and Non-Routine Non-Validated SVO's with new updated fields including the radiation type field, the updated NetSuite dose terminology, shipment ID's and environmental condition dwell times. MRKT-10 has been updated to ensure the new NetSuite changes are incorporated. This training guide for Steri-Tek customers will provide easy utilization instructions when navigating the customer portal. MRKT-11 includes the Reason field and how it will be used in case of the event an order requires updates or corrections before acceptance. The Environmental Conditioning drop down has been updated to specify Pre or Post processing. MISC-39-1 new role has been added for troubleshooting workflow errors and customer success role has been added as it is the responsibility of customer success to assist customers and these permissions will streamline Steri-Tek's process. WI-103 initial release to provide instructions on NetSuite maintenance releases conducted at Ster-Tek.

Assigned To:	Initiated By:	Priority:	Impact:
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Version History:

Author	Effective Date	CO#	Ver.	Status
Alvin Aranillo	July 18, 2025 1:09 PM PDT	CO-2822	2	Published
Angelica Polo	June 5, 2024 5:50 PM PDT	CO-1763	1	Superseded
Steven Nichols	February 3, 2023 3:05 PM PST	CO-121	0	Superseded