How to Switch Roles

Some Geo Units in NetSuite have the capability to view activity of those Units who role up to them from a hierarchical standpoint in NetSuite. Those users that have this functionality will have two roles; “Section Treas I Transactional” and “Section Treas I Consolidated”. The “Section Treas I Consolidated” role is a view only role and no transactions can be booked within NetSuite from here.

In order to toggle back and forth between roles please follow the steps below.

1. Verify the role you are currently in by looking to the top right of your screen next to your name. This example shows I am currently in the “Section Treas I Transactional” role.

   ![Example of current role](image)

2. To toggle between roles, hover your mouse over the “people icon” next to your name. If you have multiple roles, you will see them in the drop down menu.

   ![Dropdown menu showing multiple roles](image)

3. To switch roles, simply click on the role from the drop down menu.

   ![Dropdown menu showing multiple roles with selected role](image)