



CLOUDZONE ONE



NetSuite Tips & Tricks

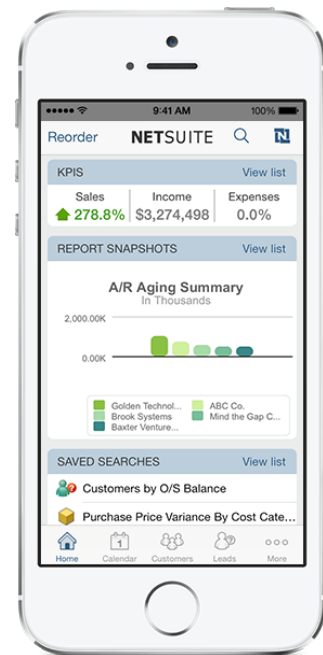
So You are Live on NetSuite

As your NetSuite/JCurve system is at the heart of your IT infrastructure we want to ensure you are getting the most out of the system.

NetSuite is a powerful solution that will continue to adapt as your business changes. To make the most of solution you should continually evaluate how best to use the system.

To assist you with this process the team at CloudZone One recommend you consider the following features to maximise the investment you have made in NetSuite:

- Challenge existing business processes - can you do them better/more efficiently?
- Rationalise roles - try and only have 1 role per user
- Reminders and KPIs on the dashboard
- Make use of SuiteAnswers and help
- Use of custom links for custom reports / external business websites.



It's Time to Get Smart

- Start to Maximise your NetSuite System
- Drive further Improvements into the Business
- No Limit to what can be achieved
- Head above the Clouds Now!



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So You are Live on NetSuite

1. Challenge your existing business processes

A Business can be as individual as people. Although many processes can be standard across different businesses, all too often there are unique requirements or processes that separate your business from your competitors.

NetSuite is therefore the perfect solution for companies as the platform allows you to cater for the uniqueness of your business. The platform is most probably one of the main reasons you selected NetSuite for your business, however all too often it gets forgotten once the madness of an implementation is behind you, but we want to bring this back to the forefront of your mind.

The NetSuite Platform offers you the chance to improve processes or capture unique requirements simply and quickly. The key areas of the platform are:

- Custom Forms
- Custom Fields
- Custom Record
- SuiteFlow

Custom Forms

Remember that you can personalise each and every form in your NetSuite Application, so think about whether different layouts of the screens are required for different scenarios. You can link different output forms, such as Invoices, to your input forms, thereby presenting different data to clients based on the type of sale.

The screenshot shows the 'Custom Transaction Form' configuration page in NetSuite. The form is titled 'Corporate Clients Invoice' and has the ID 'customform_256_4901286_581'. It is currently set to 'Invoice' type. The 'PRINTING TEMPLATE' dropdown is set to 'Standard Invoice PDF/HTML Template'. The 'REMITTANCE SLIP' dropdown is set to 'Standard Remittance Slip'. The interface includes a 'Save' button, a 'Cancel' button, and a 'Reset' button. There are also buttons for 'Move Elements Between Subtabs', 'Change ID', and 'Actions'. The main area contains a table with columns for 'LABEL', 'SHOW', 'MANDATORY', 'DISPLAY TYPE', 'CHECK BOX DEFAULT', 'DESCRIPTION', 'FIELD GROUP', 'COLUMN BREAK', 'SPACE BEFORE', and 'SHOW PREV'. The table lists several fields: 'Custom Form', 'Invoice #', 'Customer:Project', 'Approval Status', 'Next Approver', 'Date', and 'Start Date'. Each field has a 'SHOW' checkbox, a 'MANDATORY' checkbox, a 'DISPLAY TYPE' dropdown, a 'CHECK BOX DEFAULT' checkbox, a 'DESCRIPTION', a 'FIELD GROUP' dropdown, a 'COLUMN BREAK' checkbox, a 'SPACE BEFORE' checkbox, and a 'SHOW PREV' checkbox.

LABEL	SHOW	MANDATORY	DISPLAY TYPE	CHECK BOX DEFAULT	DESCRIPTION	FIELD GROUP	COLUMN BREAK	SPACE BEFORE	SHOW PREV
Custom Form	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Normal	<input type="checkbox"/>	Custom Form	Primary Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoice #	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	<input type="checkbox"/>	Doc. No.	Primary Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer:Project	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Normal	<input type="checkbox"/>	Entity	Primary Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Approval Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	<input type="checkbox"/>	Approval Status	Primary Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Next Approver	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	<input type="checkbox"/>	Next Approver	Primary Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Normal	<input type="checkbox"/>	Date	Primary Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Normal	<input type="checkbox"/>	Start Date	Primary Information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



So You are Live on NetSuite

Custom Fields

As your business evolves or your requirement to analyse different parts of the business expands, remember setting up custom fields is a great way to focus on key areas of the business and ultimately drive greater efficiencies. You can create many different types of fields and then use these to produce detailed analysis via the Saved Search functionality. Never stop thinking about what you want to measure.

The screenshot shows the NetSuite 'Custom Entity Field' configuration interface. At the top, a navigation bar includes 'Activities', 'Payments', 'Transactions', 'Lists', 'Reports', 'Customization', 'Documents', 'Setup', 'Asset Listing', 'Liquidity', and 'Support'. The main title is 'Custom Entity Field' with a 'List' link on the right. Below the title are 'Save', 'Cancel', 'Reset', and 'Apply to Forms' buttons. The form contains several fields: 'LABEL' (with a red asterisk) containing 'Custom Analysis by Customer', 'ID' (empty), 'OWNER' (a dropdown menu showing 'David Rainbow David Rainbow'), and 'DESCRIPTION' (empty). A 'TYPE' dropdown menu is open, showing options: 'Free-Form Text', 'Document', 'Email Address', 'Free-Form Text', 'Help', 'Hyperlink', 'Image', and 'Inline HTML'. To the right of the form are three checkboxes: 'GLOBAL SEARCH', 'RECORD IS PARENT', and 'INACTIVE'. Below the form is a section titled 'Applies To' with sub-sections 'Display', 'Validation & Defaulting', 'Sourcing & Filtering', and 'Access'. Under 'Access', there are three columns of checkboxes: 'CUSTOMER', 'PROJECT', 'SUPPLIER', 'EMPLOYEE', 'OTHER NAME'; 'CONTACT', 'PARTNER', 'WEB SITE', 'GROUP'; and 'AVAILABLE EXTERNALLY', 'PRINT ON STATEMENT', 'PRINT ON PRICE LIST', 'PROJECT TEMPLATE'. At the bottom of the form are 'Save', 'Cancel', 'Reset', and 'Apply to Forms' buttons.



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Custom Records

There are many scenarios where you may need to record additional records for your business to operate. All too often we see that this information is captured in spreadsheets and manually updated. Have you thought about capturing further information within NetSuite? Examples could be a Leave Request Form, or Request for Training. The only limit is your imagination as to how the data can be recorded.

Custom Record Type More

Leave Application

[Save](#) [Cancel](#) [Reset](#) [Actions](#)

NAME *
Leave Application

ID
customrecord293

OWNER
David Rainbow David Rainbow

DESCRIPTION

INCLUDE NAME FIELD
 SHOW ID
SHOW CREATION DATE ON RECORD ON LIST
SHOW LAST MODIFIED ON RECORD ON LIST

SHOW OWNER ON RECORD ON LIST ALLOW CHANGE
ACCESS TYPE
Require Custom Rec...Entries Permission
 ALLOW UI ACCESS
 ALLOW MOBILE ACCESS
 ALLOW ATTACHMENTS
 SHOW NOTES
 ENABLE MAIL MERGE
 RECORDS ARE ORDERED
 SHOW REMOVE LINK ALLOW CHILD RECORD EDITING ALLOW DELETE

ALLOW QUICK SEARCH
 ALLOW QUICK ADD
 ENABLE SYSTEM NOTES
 INCLUDE IN GLOBAL SEARCH
 INCLUDE IN SEARCH MENU
 ENABLE OPTIMISTIC LOCKING
 ENABLE INLINE EDITING
 HIERARCHY
 INACTIVE

Fields • Subtabs • Sublists • Icon • Numbering • Forms • Online Forms • Permissions • Links • Managers • Child Records • Parent Records • History • System Notes •

SHOW INACTIVES

[New Field](#) [Move To Top](#) [Move To Bottom](#)

DESCRIPTION	ID	TYPE	LIST RECORD	TAB	SHOW IN LIST
Name	custrecord42	Free-Form Text			No
No of Days	custrecord43	Free-Form Text			No

[Save](#) [Cancel](#) [Reset](#) [Actions](#)

Leave Application List Search Customise More

[Save](#) [Cancel](#) [Reset](#)

NAME *

INACTIVE

Remove All

NAME

NO OF DAYS

ATTACH FILE *

FOLDER

SIZE (KB)

LAST MODIFIED

FILE TYPE

<Type then tab>

[Add](#) [Cancel](#) [Insert](#) [Remove](#)

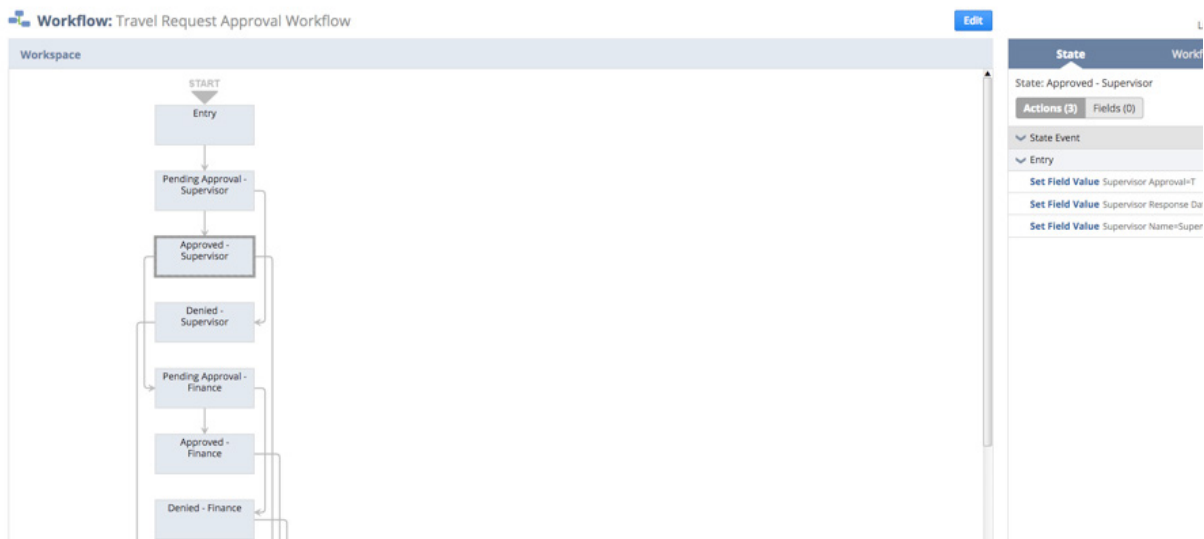
[Save](#) [Cancel](#) [Reset](#)



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SuiteFlow

Now that you have started to capture additional information in NetSuite, how about looking at ways to drive a process through your business. Does the Leave Application need approval or does a certain screen need to behave differently based on data entered by the user? NetSuite SuiteFlow can drive all of this for you and is not as complex as you might think.



2. Rationalise Roles

Your roles drive how you experience the NetSuite functions. Switching roles can offer advantages but sometimes you need to focus on the tasks at hand and not keep changing your roles. You may have decided during implementation that the standard roles will work for you, but now your users are familiar with the functions, look at the roles they have and try to standardise to meet the functions in your business and not the individual users. This allows for an easier management process for your system administrators. Remember though, never run your business in the Administrator role as this has complete access to all functions with no restrictions!



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3. Reminders & KPI's on the Dashboard

Initially when you setup NetSuite your Dashboard would have contained many of the standard Reminders and KPI's for the role you carry out in the business, however now that you are improving the data you are capturing through the platform, don't forget that capturing the data is only part of the story. Do you need to measure this data or be reminded to process a new transaction? Your Dashboard can also present Custom KPI's and Reminders so make sure you include this information.

Select the 'Available For Reminders' in the Saved Search and you can add this to the reminder portlet

The screenshot shows the 'Saved Transaction Search' configuration page for 'Customer Sales Aging'. The search title is 'Customer Sales Aging' and the ID is 'customsearch280'. The owner is 'A Wolfe'. The search is public and available as a list view. The criteria table is as follows:

Filter	Description	Formula
Main Line	is false	
Type	is Invoice	
Account Type	is Income	
Item : Type	is any of Inventory Item, Item Group, Assembly/Bill of Materials	

At the bottom right, the 'Available For Reminders' checkbox is checked. The interface includes buttons for Save, Reset, Cancel, Preview, New Template, Pivot Report, Change ID, and Actions.

The 'C' on the item in the portlet dictates this is a Custom Reminder

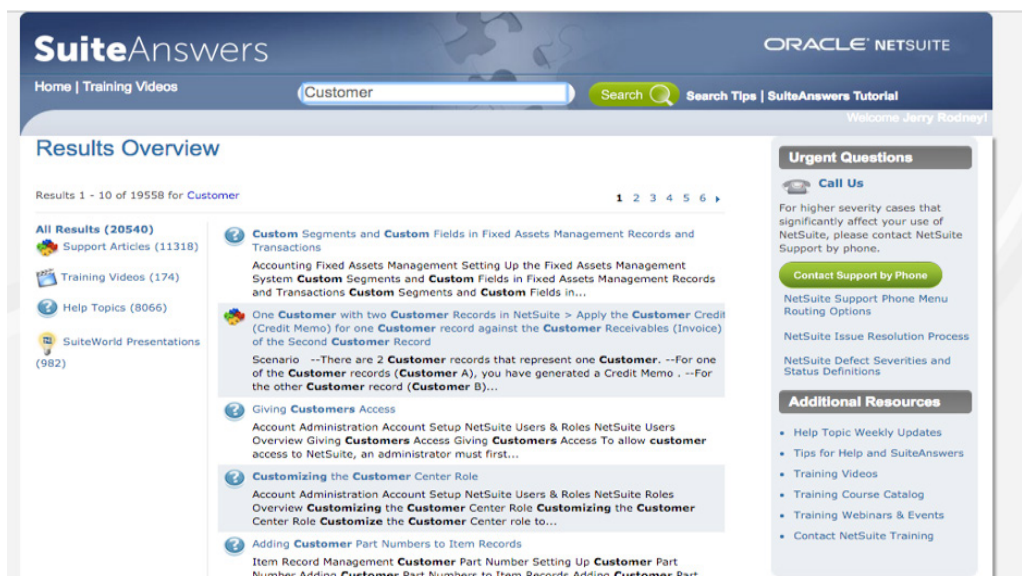
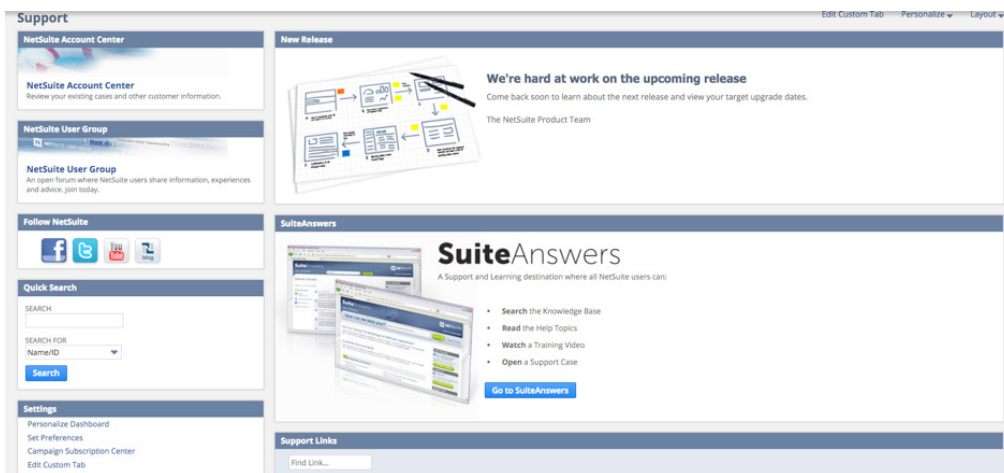
The screenshot shows the 'Select Reminders' dialog box in NetSuite. It has a search bar and a 'Type' dropdown set to 'All'. The dialog is divided into two columns: 'Click or Drag to Add' and 'Current Selections'. The 'Click or Drag to Add' column lists various reminders, including 'SW2013 - Bin Replenishment Report', 'SW2013 - Item Returns Due To Product Quality Alert', 'SW2013 - PO's in Container Packing Status', 'SW2013 - RMAs Due To Product Quality Alert', 'Sales Order Pending Credit Check', 'Sales Orders to Approve', 'Sales Orders to Print', 'Solutions to approve', 'Standard Cost Items', 'Supply Plans Created this week', 'Tasks due today', 'Tasks that are overdue', 'Tasks to complete', and 'Time Records to Approve'. The 'Current Selections' column shows 'AR Aging' selected. At the bottom, there are 'Save' and 'Cancel' buttons.

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4. Make use of SuiteAnswers

The team at CloudZone One are always here to help you with issues that may arise with your NetSuite system, but remember SuiteAnswers is a resource available to you 24/7. NetSuite put a great deal of effort into the content, so get familiar with using this information, it can save you so much time.

You will find SuiteAnswers on the Support Tab in a Dashboard near you!



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5. Use of custom links for custom reports / external business websites

As much as NetSuite contains most of your business information, Cloud Technology allows you to use information in the public domain, so remember to include this information in your Dashboard. Think about all the sites you regularly use for daily tasks in your business and add this content into NetSuite

You can add RSS Feeds

RSS Feeds

Save Cancel Reset

SOURCE
ESPAN - Headlines

FEED URL *
http://sports.espn.go.com/espn/rss/news

NUMBER OF LINKS *
10

SHOW DETAILS

Set Up Shortcuts

Save Cancel Reset

Move To Top Move To Bottom

ENABLE	LABEL	EXTERNAL URL	OPEN IN NEW WINDOW
<input checked="" type="checkbox"/>	Enter Purchase Orders		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Information Items		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Pay Bills		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Physical Inventory Worksheet		<input type="checkbox"/>
<input checked="" type="checkbox"/>	CloudZone One	http://www.czo.co.nz	<input type="checkbox"/>

Save Cancel Reset

Activities My Dashboard Sales/Marketing Expenses HR Financial Reports Documents Setup KPI Scorecard Support

Home

Change Subsidiary Viewing: Portlet date settings Personalize Layout

Shortcuts

- Enter Purchase Orders
- Information Items
- Pay Bills
- Physical Inventory Worksheet
- CloudZone One

KPI Meter

Expenses

382.8K

62.5K

Today's Appointments

Map Satellite

Top 10 Items By Qty Sold

this fiscal quarter

Sales by Item Summary

Item	Qty Sold
Library Bottle...	2
Library Bottle...	2
Ghost Whispere...	2
Genoa Eggnom...	2
HP LaserJet 42...	-2
Salida Backpac...	-6

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The day LeBron became a Laker: Behind-the-scenes stories
Inside the King's decision and how it instantly changed the Lakers, the Cavaliers and the entire NBA.

Which Lakers prospects could help LeBron the most?
The Lakers' summer league squad is finding success in Vegas. Will their play translate to the regular season?

Sources: Carmelo meeting with prospective teams
Carmelo Anthony and his representatives have met with Houston Rockets and Miami Heat officials in recent days with the permission of the Oklahoma City Thunder in advance of Anthony's inevitable departure, league sources tell ESPN's Adrian Wojnarowski.

Can you hear me now? Phone flub dooms Indians

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