CLOUDZONE ONE

NetSuite Tips & Tricks

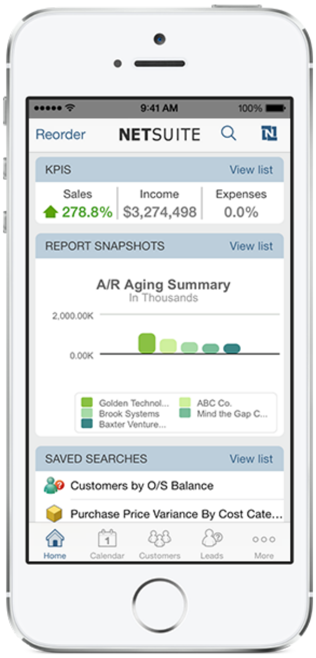
So You are Live on NetSuite

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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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.

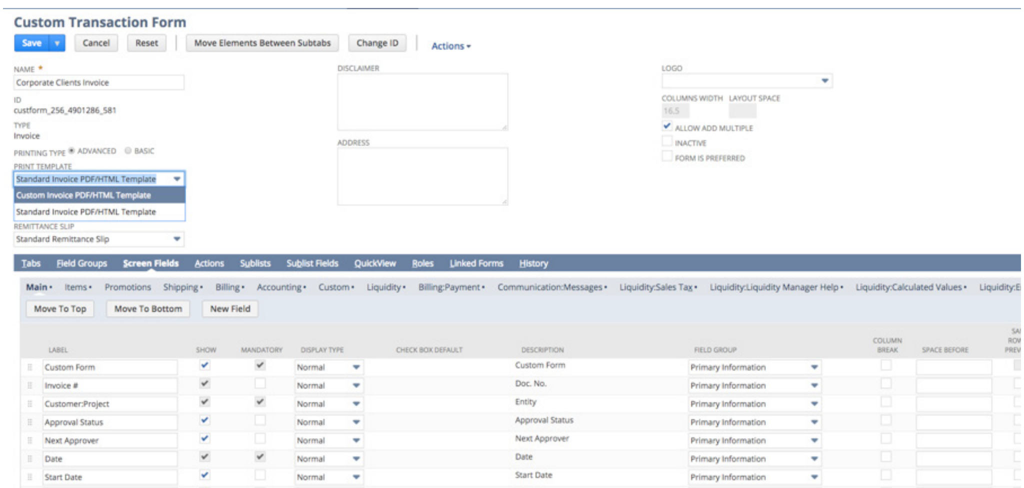
NetSuite is therefore the perfect solution for companies as the platform allows you to cater for the uniqueness of your business. The platform is most probably one of the main reasons you selected NetSuite for your business, however all too often it gets forgotten once the madness of an implementation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



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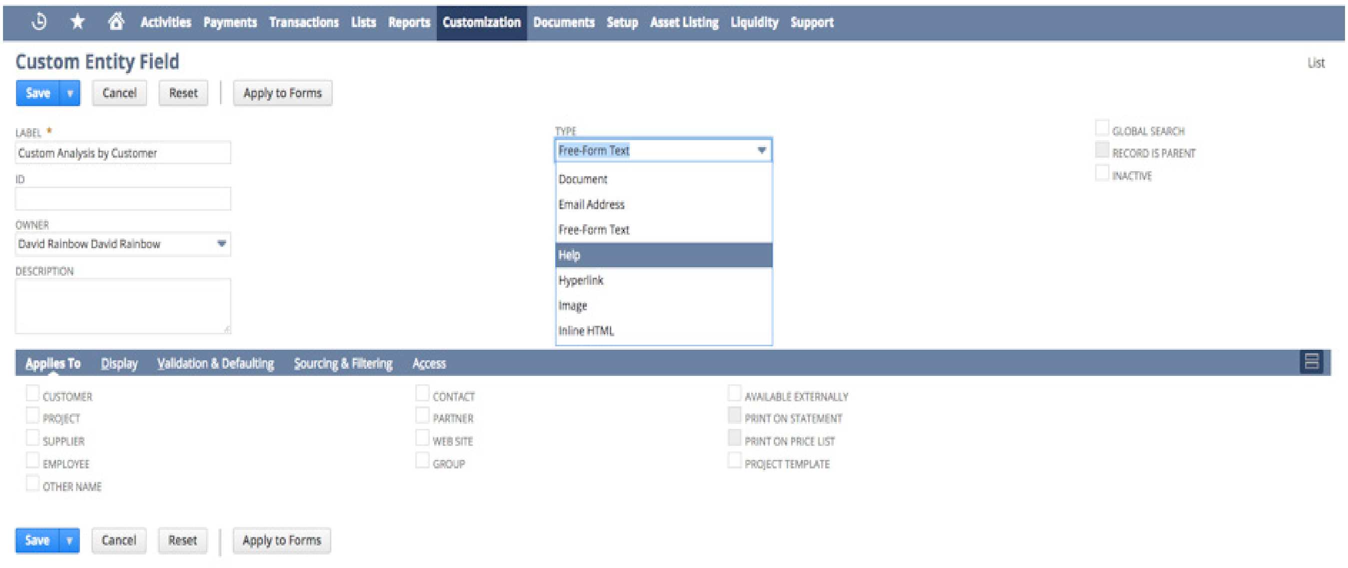
Custom Fields

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.



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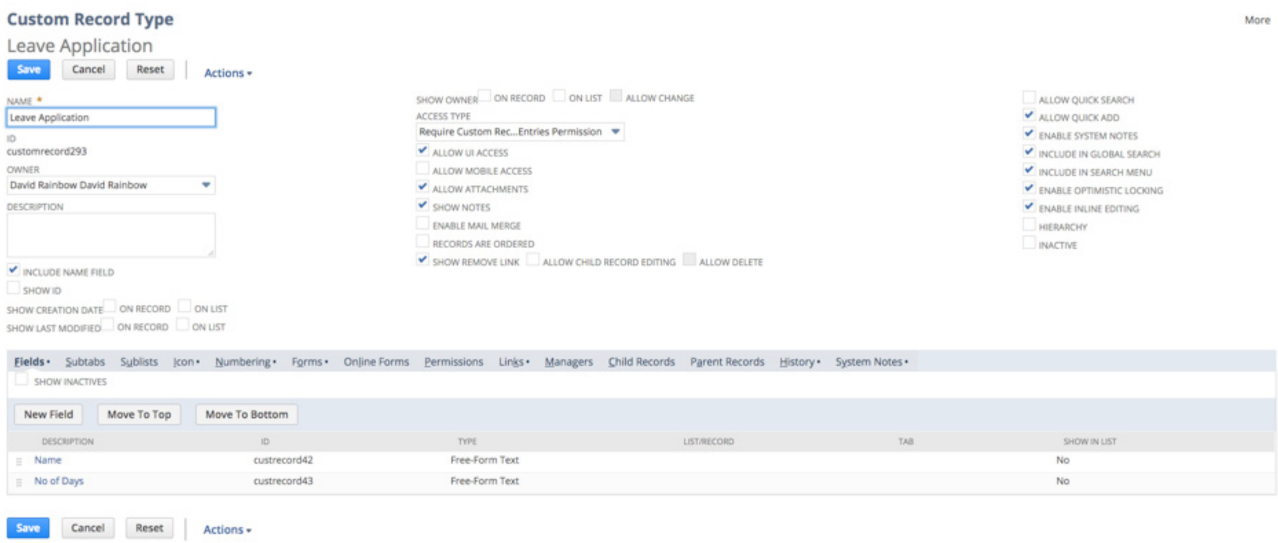
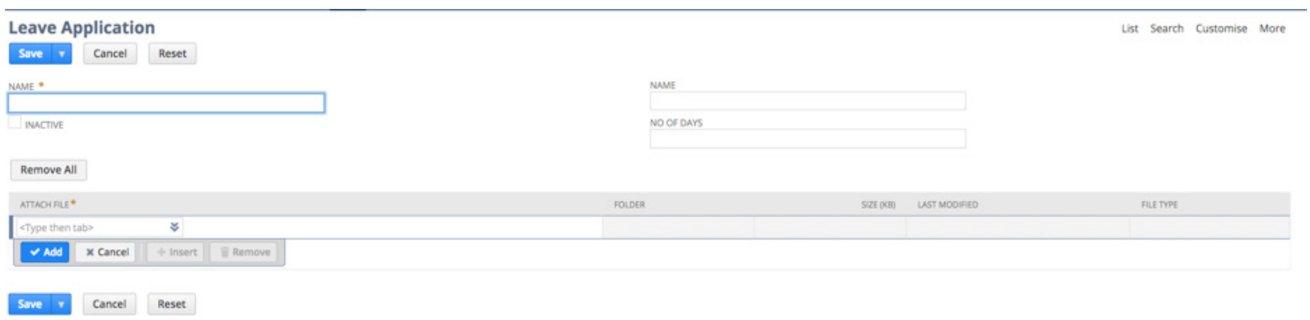
Custom Records

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.





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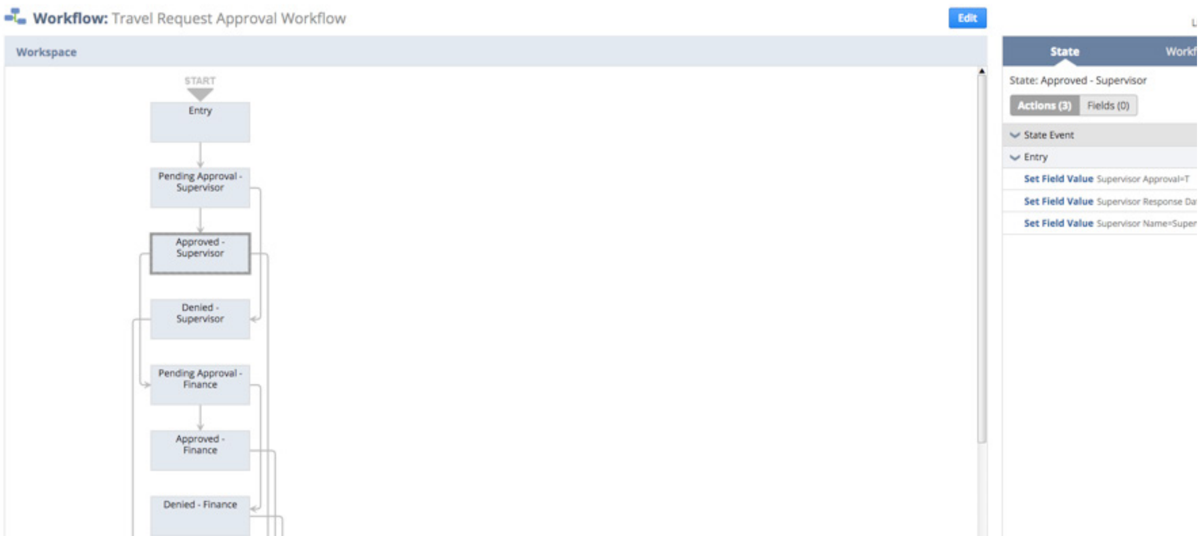
SuiteFlow

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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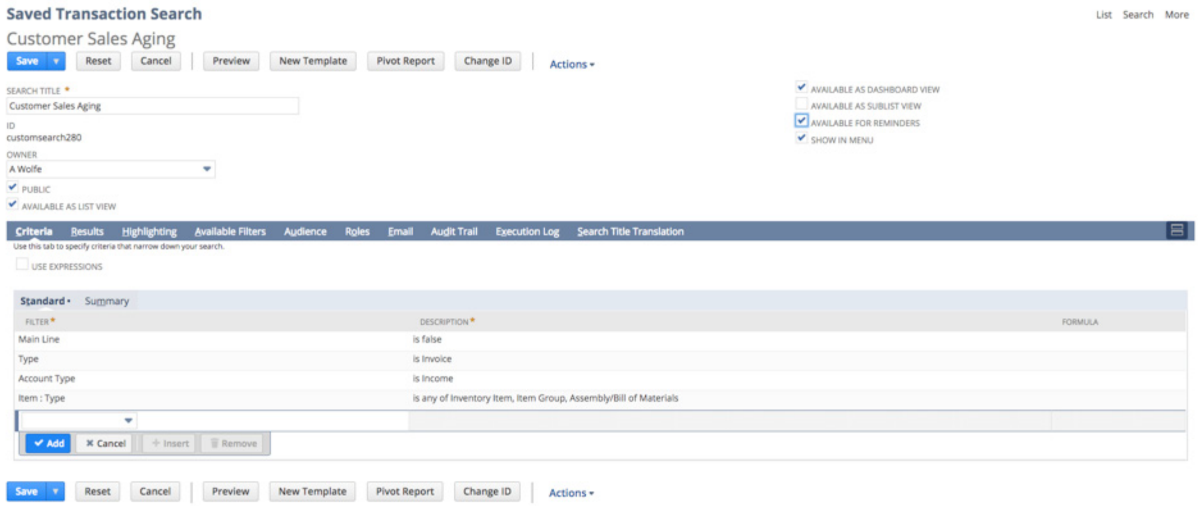
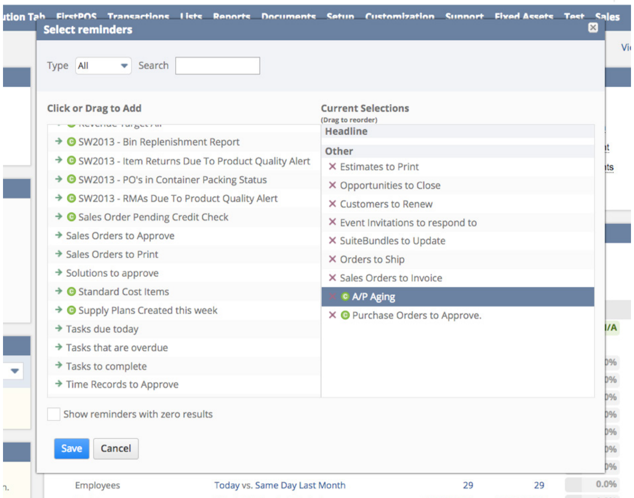
3. Reminders & KPI's on the Dashboard

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



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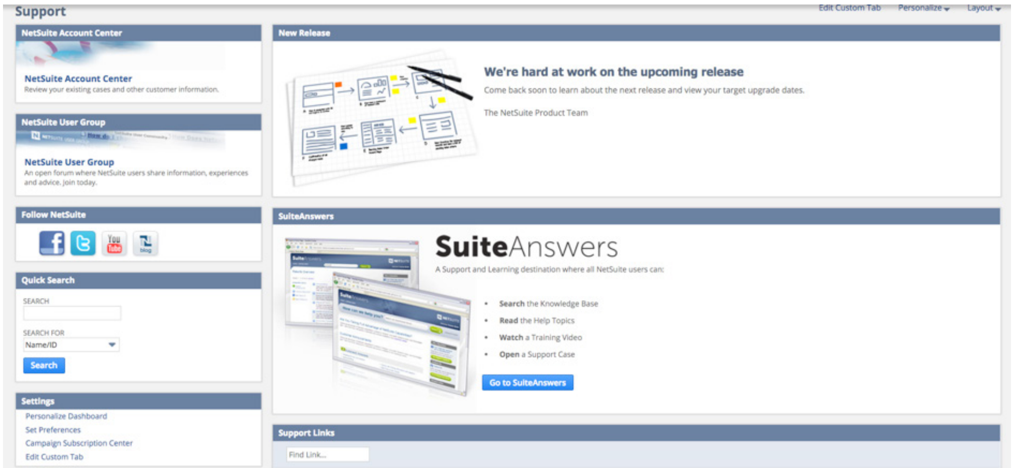
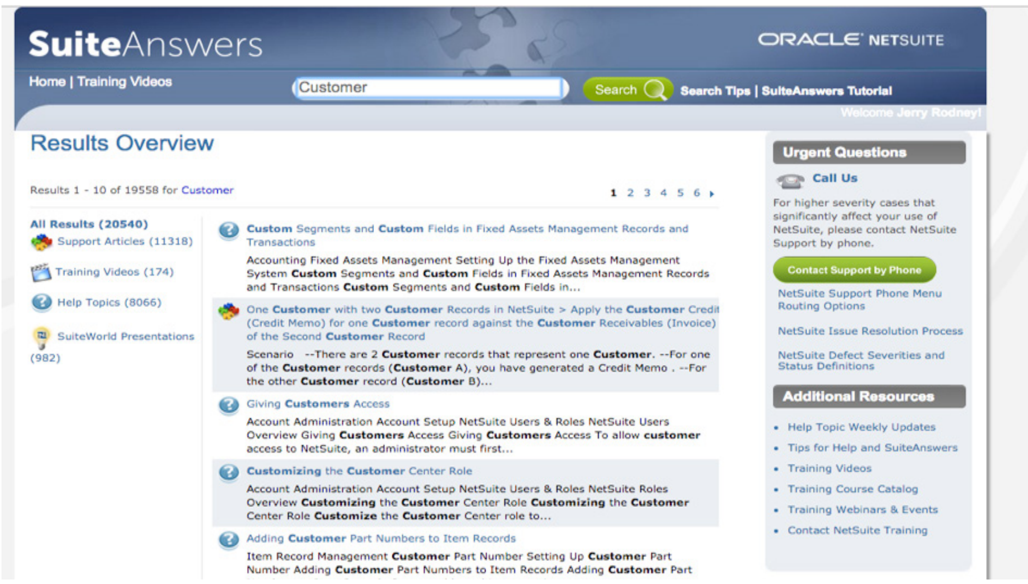
4. Make use of SuiteAnswers

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!

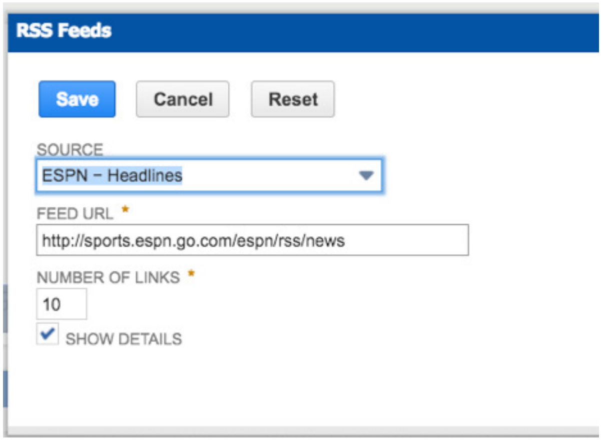


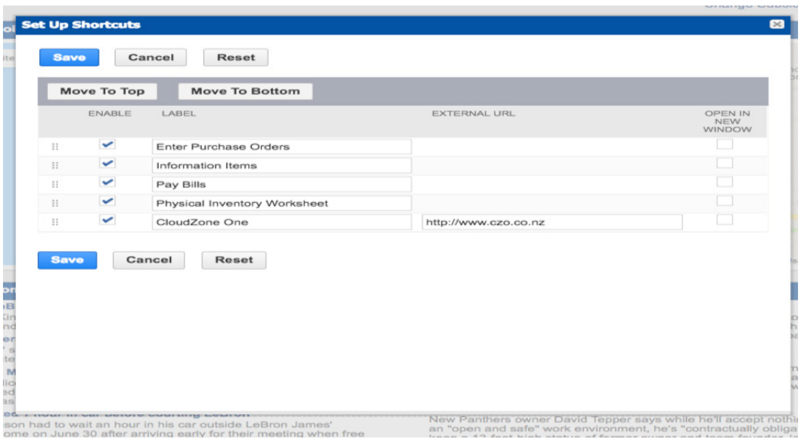


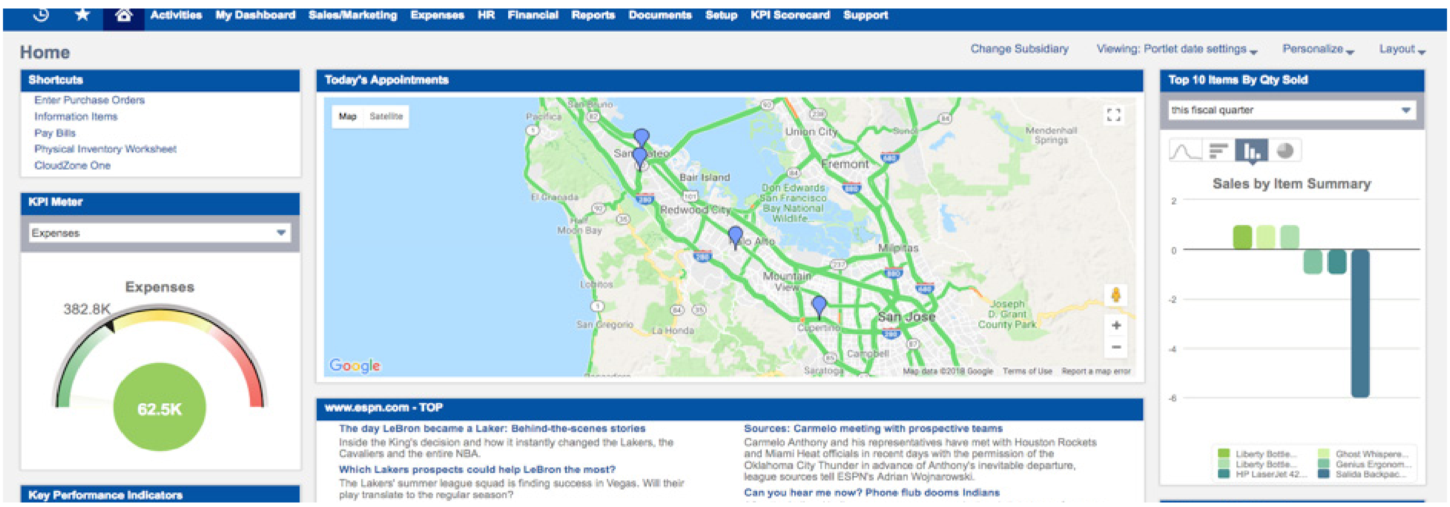
5. Use of custom links for custom reports / external business websites

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







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