Agenda for April 21st

ONSUG Group Dynamics – Survey Results

Presentation and Discussion led by: Stephanie Frisina, ONSUG Speaker Chair

Building Corporate Saved Searches in the NetSuite Menu

Presentation by: Mark Tanner, ONSUG Co-Chair

MessageMedia – Meeting Sponsor

Presentation by: Rich Hay – Director of Strategic Partnerships,

Justin Koppstein – Account Executive – Ecosystems

Ryan Longenecker – Solutions Manager

Rolls and Security

Presentation by: Durrell Martin, ONSUG Webmaster

Bring your Questions

Discussion led by: Mark Tanner, ONSUG Co-Chair

ONSUG July Meeting Teaser

Presentation by: Lisa Reed, ONSUG Treasurer
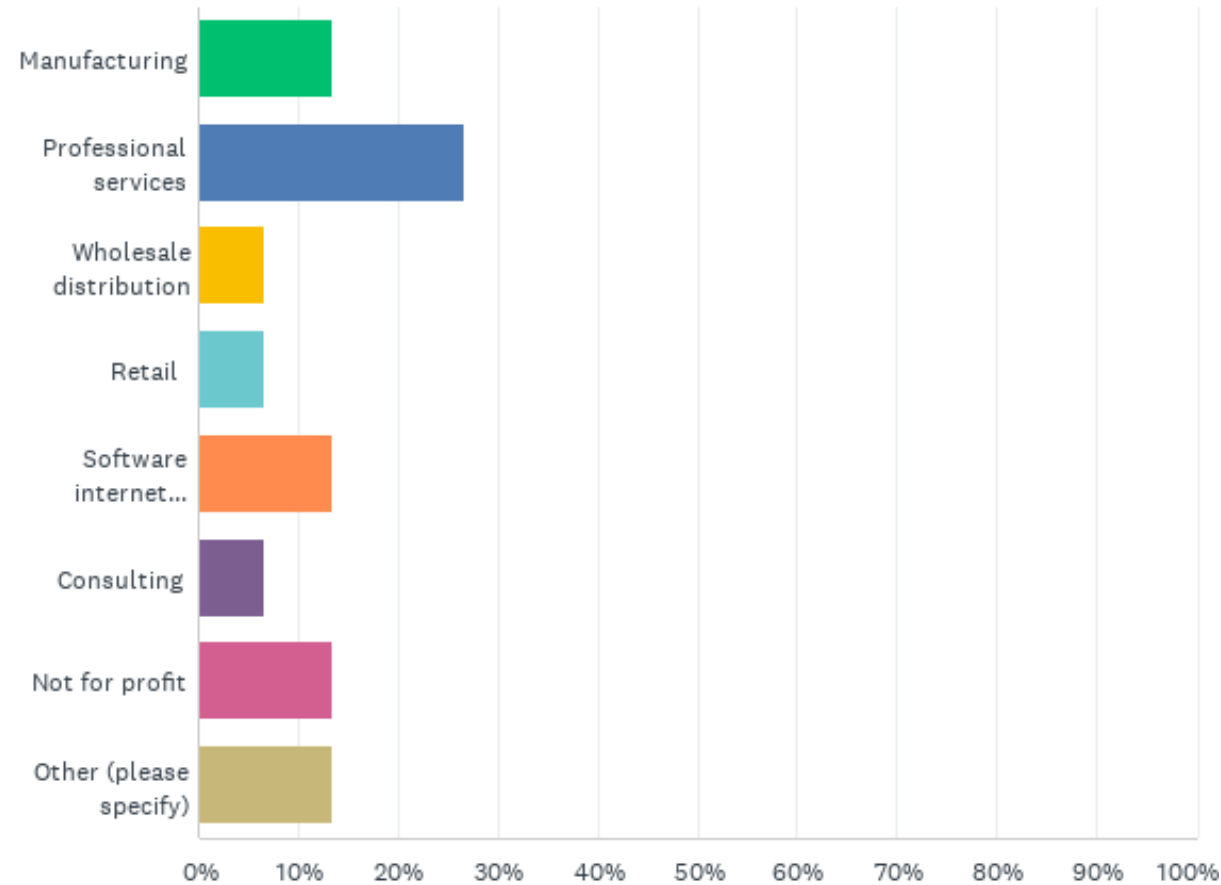
Building Corporate Saved Searches in the NetSuite Menu

Organizing Saved Searches by department

- ➢ Create new Menu items in NetSuite
  - ▪ Center Tab
  - ▪ Center Categories
  - ▪ Center Links
- ➢ Build up the new Menu
  - ➢ Add Saved Searches
  - ➢ Add Links to NetSuite forms
  - ➢ Add Links to external websites

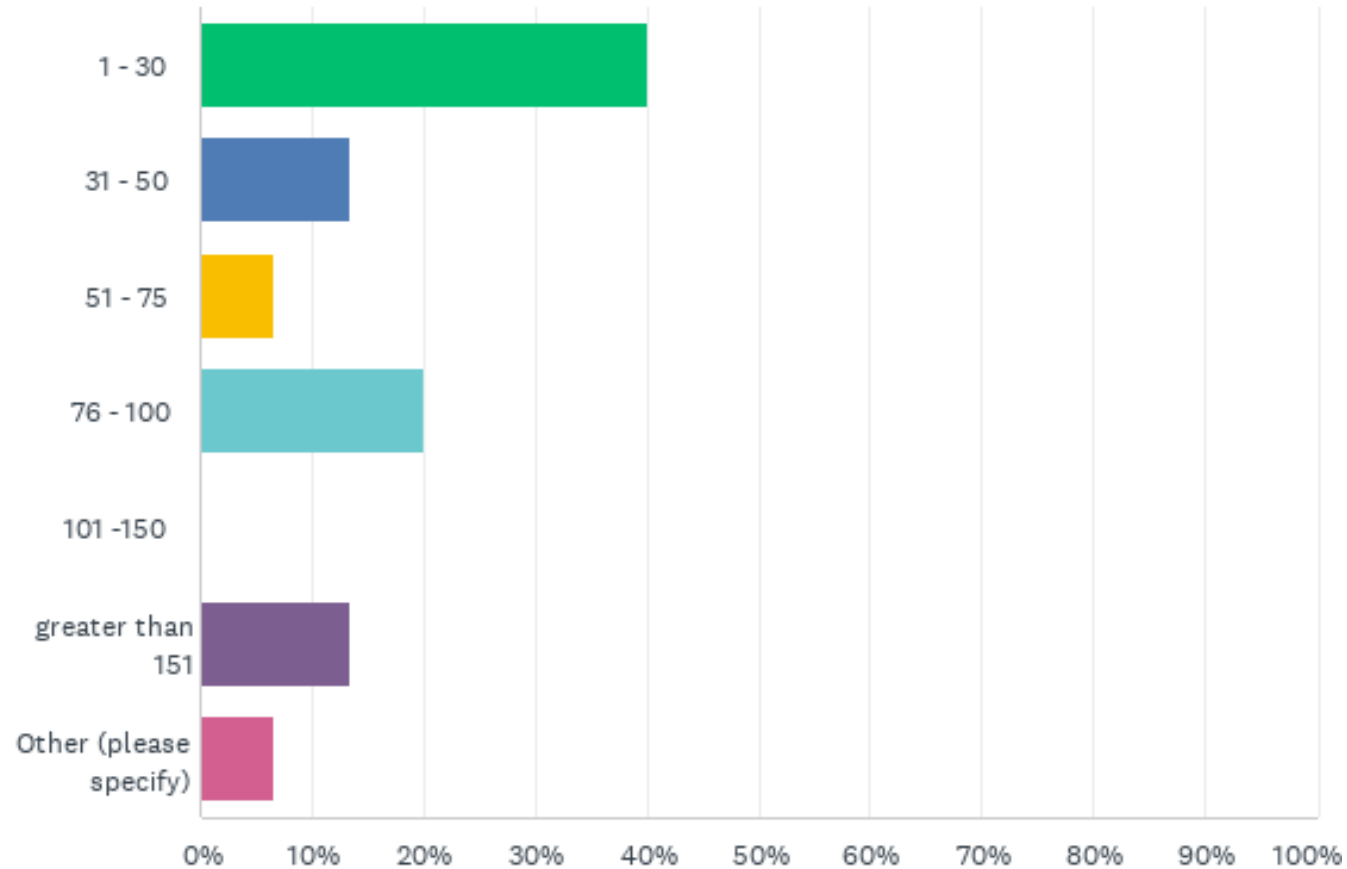# Q3: What segment best reflects your company?

Answered: 15   Skipped: 0

Q7: How many NetSuite licenses does your company have ?

Answered: 15   Skipped: 0

Q9: Please identify your interest in learning more about these NetSuite Modules – Top 10 listed

Answered: 15   Skipped: 0

	NOT VERY INTERESTED	SOMEWHAT INTERESTED	INTERESTED	VERY INTERESTED	EXTREMELY INTERESTED	N/A	TOTAL	WEIGHTED AVERAGE
Advanced Financials	13.33% 2	0.00% 0	20.00% 3	13.33% 2	40.00% 6	13.33% 2	15	3.77
Revenue Management	14.29% 2	0.00% 0	21.43% 3	7.14% 1	42.86% 6	14.29% 2	14	3.75
Planning & Budgeting	7.69% 1	0.00% 0	30.77% 4	23.08% 3	23.08% 3	15.38% 2	13	3.64
Electronic Bank Payments	7.14% 1	7.14% 1	28.57% 4	21.43% 3	28.57% 4	7.14% 1	14	3.62
CRM	14.29% 2	21.43% 3	14.29% 2	7.14% 1	35.71% 5	7.14% 1	14	3.31
Advanced Inventory Management	35.71% 5	0.00% 0	14.29% 2	7.14% 1	28.57% 4	14.29% 2	14	2.92
Project Management	15.38% 2	7.69% 1	38.46% 5	15.38% 2	7.69% 1	15.38% 2	13	2.91
SuiteBilling	25.00% 3	0.00% 0	33.33% 4	8.33% 1	16.67% 2	16.67% 2	12	2.90
SuiteCommerce	23.08% 3	23.08% 3	0.00% 0	7.69% 1	23.08% 3	23.08% 3	13	2.80
Fixed Assets Management	28.57% 4	7.14% 1	14.29% 2	28.57% 4	7.14% 1	14.29% 2	14	2.75

Q10: Identify your level of interest of these topics for future ONSUG Meetings – Top 10 listed

ONTARIO NETSUITE USER GROUP

Answered: 15   Skipped: 0

	NOT VERY INTERESTED	SOMEHAT INTERESTED	INTERESTED	VERY INTERESTED	EXTREMELY INTERESTED	N/A	TOTAL	WEIGHTED AVERAGE
Saved Searches	0.00% 0	0.00% 0	40.00% 6	26.67% 4	33.33% 5	0.00% 0	15	3.93
Implementation Tips & Tricks	6.67% 1	6.67% 1	20.00% 3	33.33% 5	33.33% 5	0.00% 0	15	3.80
Free Add-ons and Bundles	7.69% 1	7.69% 1	7.69% 1	61.54% 8	15.38% 2	0.00% 0	13	3.69
Custom Transactions	0.00% 0	7.14% 1	42.86% 6	28.57% 4	21.43% 3	0.00% 0	14	3.64
Custom Record & Fields	7.14% 1	0.00% 0	42.86% 6	28.57% 4	21.43% 3	0.00% 0	14	3.57
Customization Show & Tell	7.14% 1	0.00% 0	50.00% 7	21.43% 3	21.43% 3	0.00% 0	14	3.50
Best 3rd Party Solutions	7.14% 1	14.29% 2	21.43% 3	35.71% 5	21.43% 3	0.00% 0	14	3.50
Month End Procedures	14.29% 2	0.00% 0	42.86% 6	21.43% 3	21.43% 3	0.00% 0	14	3.36
Birds of a Feather (Roundtables by Functional Area)	7.14% 1	14.29% 2	50.00% 7	21.43% 3	7.14% 1	0.00% 0	14	3.07
Cases	7.69% 1	23.08% 3	46.15% 6	7.69% 1	15.38% 2	0.00% 0	13	3.00

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 Rich Hay – Director of Strategic Partnerships

 Justin Koppstein – Account Executive – Ecosystems

 Ryan Longenecker – Solutions Manager

Extend the power of NetSuite with SMS

SMS and NetSuite work together to deliver automated, personalized messages that will grab attention, drive better engagement, and boost ROI and efficiencies. Why should your customers use SMS? Customers now prefer to engage with businesses via mobile communications, and SMS is one of the most popular mobile activities today. Research shows 70% of customers prefer businesses to communicate with them using SMS.

Save-the-Date: Next Meeting

ONTARIO NETSUITE USER GROUP

July 2022

No.	Sun	Mon	Tue	Wed	Thu	Fri	Sat
26						1	2
27	3	4	5	6	7	8	9
28	10	11	12	13	14	15	16
29	17	18	19	20	(21)	22	23
30	24	25	26	27	28	29	30
31	31						

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