

# Fall Meeting - November 16, 2023

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## Special Thanks to our Meeting Sponsor



Join Clear Guest

Username: 01928

Password: ZMs@4o



# Agenda for November 16, 2023

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**9:00 – 9:10 Welcome**

**9:10 – 9:50 Review of SuiteWorld and On-Air**

Presentation by: Mark Tanner, ONSUG Co-Chair

**9:50 – 10:00 Netgain – Meeting Sponsor**

Presentation by: Chris Miller, SVP of Product Strategy

**10:00 – 10:45 NetSuite 2023.2 Features**

Presentation by: Gavin Davidson, ONSUG Co-Chair

**10:45 – 11:00 Tips and Tricks**

Presentation by: Mark Tanner, ONSUG Co-Chair (on behalf of Lisa Reed, ONSUG Treasurer)

**11:00 – 12:00 In-Person Networking**



# Board Members

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**Mark Tanner, Co-Chair**

**Gavin Davidson, Co-Chair**

**Lisa Reed, Treasurer**

**Brandon Peneycad, Co-Membership Chair**

**Stephanie Frisina, Co-Membership Chair**

**Barb Blundon, Co-Membership Chair**

**Darcie Vany, Recording Secretary**

**Rajneesh Kumar, Co-Webmaster / Tech Adviser**

**Paul Stanchev, Speaker Chair**

**Durrell Martin, Co-Webmaster / Tech Adviser**

# We're Back!!

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... in-person that is



Lunch and Learn  
on-line meetings

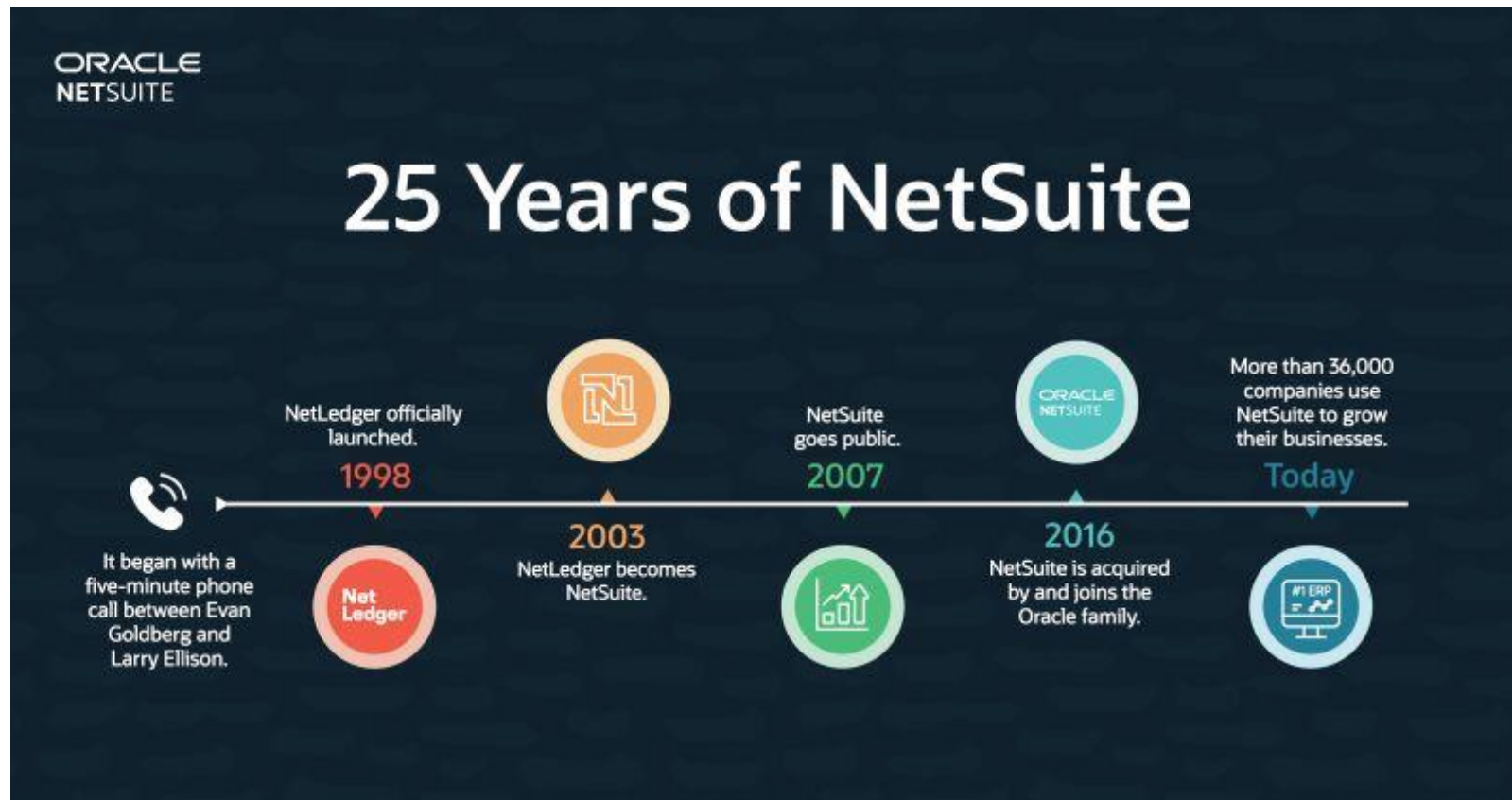


Increase LinkedIn  
activity



ONSUG.ORG  
web site

# SuiteWorld Recap



3,000 in Canada

# SuiteWorld 2023 -> Suite UP



7,000 attendees

## Key themes

- AI – working smarter, not harder
  - Insights
  - Supply Chain
- 360 views (customer, cash)
  - Gathering data into “Dashboards”
- Enterprise Performance Management (EPM)
  - account rec, closing, tax and narrative reporting
  - NetSuite Capital, NetSuite Pay
  - electronic invoicing compliance



# Why attend SuiteWorld?

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- Networking
  - NetSuite employees
  - Partners
  - Customers
- Live Break out sessions
- Partner Exhibit
- NetSuite Solution “Land”
- Get out of the “day-to-day” for planning

# Deep Dive Into Dashboard Design

## [ADM1679SES]

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- PPT is a good introduction and explanation
- Permissions -> SA 9911
  
- Find a middle ground between “minimalist” and “Kitchen Sink”
- Add shortcuts to Navigation Portlet so all users/roles have access to frequently used shortcuts (without publishing new dashboards)
  
- “Help Portlet” – group training documents by using URLs from the file cabinet
- Suite Builder install bundles -> search for “Platform Solutions Group”



# Using the New Formula (HMTL) Column Type [ADM1295SES]



## WOW! 1: Robust Formatted Views Instead of Single Line Text Displays

OVERVIEW UPSIDE PE | PSER | PARTNER REQUESTS VAT TEAM CHECKLIST

**Team RAMSDALE**

**OpenAir** Upside  
ABC Co, LLC  
Topeka, KS

\$183,000 8/30/2023  
CLOSE (80%) 131 Days Open  
Last updated: 8/30/2023

Sartor, Andrew C

**UPSIDE**  
\$183,000.00

**PS in Process**  
PBCS  
PS Type  
Court, Mary  
PS Lead

**Private Equity**  
Ridge Industries

**Requests**  
SC Request  
CS Engagement

**VAT Team**  
CI: Brian Wilson  
CI: Abbey Rhode  
SC: Jim Morrison

**CHECKLIST**

- MEDDIC
- BR attached
- Credit check
- DocuSign sent

**OPPORTUNITY**

**Regal Pacific Group** Upside  
RPG ERP Replacement

\$1,000,000 11/24/2023  
Need to Update  
ENGAGE (20%)  
Last updated: 8/3/2023

**TITLE**

**Advanced Inventory - Lattis Infusion**

Icons: Search, Wolf, Person, Pencil, Printer, Download, Dollar

**CUSTOMER**

**Evergreen, Inc**  
Tores, Kenneth Edina, MN  
Team Morovian 798 days

ERP  
COMMIT 250k  
Inline Edit

**EXP CLOSE**

EXPECTED CLOSE  
8/30/2023

UPSIDE  
REP COMMIT  
MGR COMMIT  
VL COMMIT  
CLOSE

# WOW! 2: Searches with Progress Bars, Activity Links, Color Coding



DAYS OVERDUE	AMOUNT / %	DUE DATE / LAST LOGIN PERIOD	SO DATE / TERMS
153	\$12,732.35 100%	3/2/2023 Within the Last 7 Days	1/30/2023 (50%) Net 30 - Annual Billing
147	\$11,165.19 100%	3/8/2023 8 to 30 Days Ago	5/6/2022 (120%) Net 30 - Quarterly Billing

COMPANY NAME ▲	BALANCE	CREDIT LIMIT	% CREDIT REMAINING (PROGRESS BAR)
Blockster Inc.	18,233.82	40,000.00	54.4%
Blue Pumpkin	1,750.00	0.00	%
Cadvery Inc.	9,622.99	40,000.00	75.9%
Channing Inc	10.00	40,000.00	100%
bridge inc.	208,490.00	40,000.00	421.2%
point LLC.	12,190.00	40,000.00	69.5%

RECURRING ARR	PROJECTED TOTAL	PROJECTED TOTAL TO ARR
	1,882.82	1883
20,000.00	58,177.61	20000 38178
2,000.00	32,575.33	20 30575
50,000.00	0.00	50000
518.40	86.85	87 431

ACTIVE / PROVISIONED USERS	ACTIVE / PAID USERS
44 5	44 5
211	209
11 2	12 1
21 7	21 11

# WOW! 3: Sidebar Searches That Pop with Info Instead of 2 Columns of Text



## Transactions

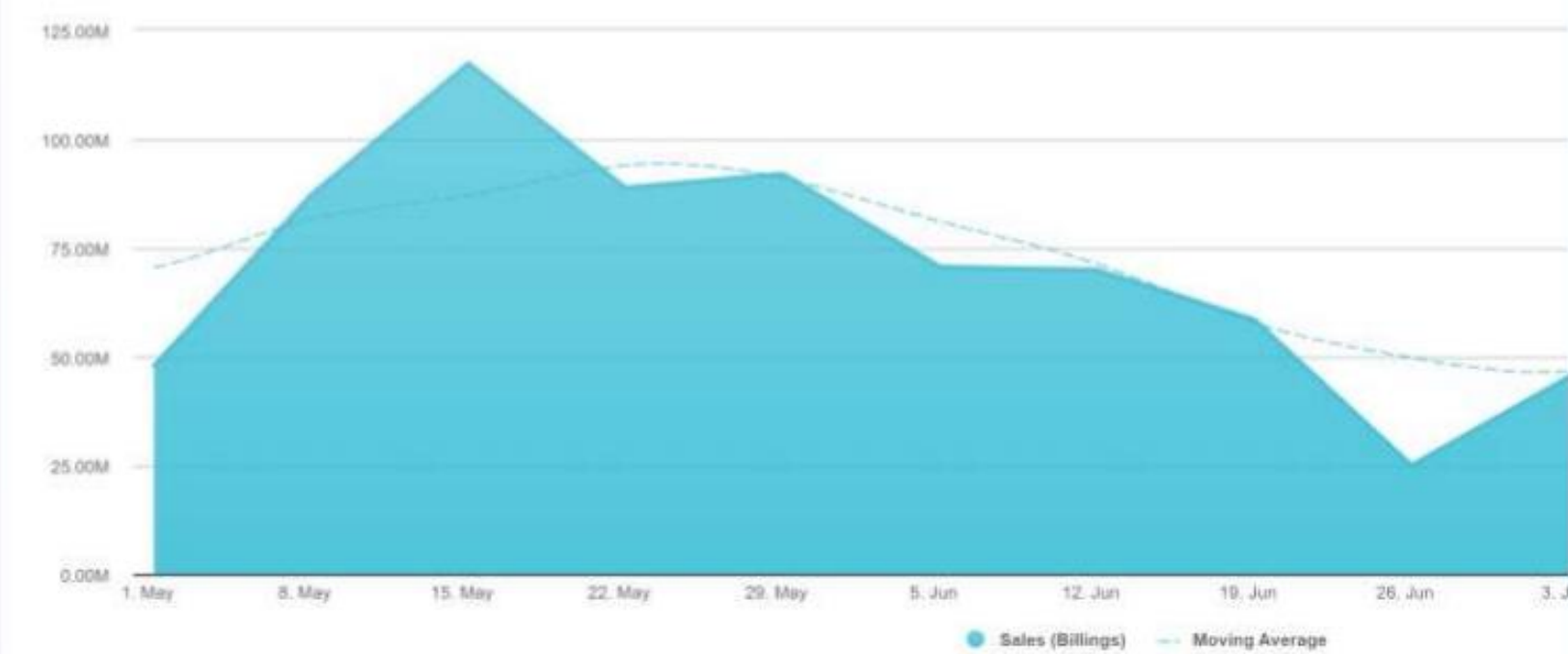
### Recent Opportunities

Abaskharoun, Mark(1) ▼  
TOTAL: 15837

Edit   View	Opportunity
  	Distribution MFG Inc. <span>Upside</span>  <b>7/10/2023</b> CLOSED WON (100%)     Last updated: 7/12/2023
  	Distribution MFG Inc. <span>Upside</span> ACS-Monitor  <b>\$18,000</b> <b>7/11/2023</b>  <b>Deal is slipping</b> (20% slip)     Last updated: 7/11/2023
  	Distribution MFG Inc. : Distribution MFG Inc-2 <span>Commit</span> 2-User Addition  <b>\$3,000</b> <b>7/14/2023</b> CLOSED WON (100%)     Last updated: 7/11/2023

### Weekly Sales (Billings) Trend

Weekly ▼



# WOW! "Info Card" as Rendered on a Single Field in a Saved Search



CustomerName

Forecast Type

Opportunity Title

 \$XXX,XXX

 DD/MM/YYYY

Opp Status (Probability %)

XX Days

City, ST

Last updated: MM/DD/YYYY

Sales Rep (Sales %)

# Using the New Formula (HTML) Column Type [ADM1295SES]

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- What tools do I need?
  - HTML Editors (HTML-ONLINE/Editor, Notepad++, Dreamweaver, Visual Studio)
  - HTML Basics ([www.w3schools.com](http://www.w3schools.com), iconsout.com, freeicons.io, icons8.com, imgbb.com)
  - CSS Styling
- Quick Overview
  - Double Pipes (| |) for Concatenation
  - Field IDs
  - SQL Expressions
  - SuiteAnswer References
    - Format the results of Saved Search Fields using Formula (Text) and HTML Tags (ID 18371)
    - Add line breaks on Formula Field (ID 37231)
    - SQL Expressions (ID 10101)
    - Case Syntax (ID 32544)

HTML

CSS

JS

QUICK TOUR

FEATURES

ARTICLES

Shop now



File Edit View Insert Format Tools Table



ABC Company

Commit

ERP for ABC Company & XYZ Partner [Oppt]

\$166,000

9/23/2022

CLOSED WON (100%)

46387 NS Partner (SI)

Last updated: 3/18/2023

Source: 2336



Clean

```

1 <table id="div__bodytab" style="width: 99.9985%;" border="0" width="100%" cellspacing="0"
2 cellpadding="0">
3 <tr id="row0" class="uir-list-row-tr uir-list-row-even">
4 <td class="listtext uir-list-row-cell" style="background-color: #cce57f !important; border-color:
5 white #cce57f #cce57f !important; width: 100%;" valign="top">
6 <div class="container"><a class="glabel" style="font-size: 8pt; float: right; white-space: nowrap
7 limportant; color: white; font-weight: bold; background-color: #bc2421!important;">Commit</a>
8 <div class="header"><a href="https://system.netsuite.com/app/common/entity/custjob.nl?
9 id=111779111">ABC Company</a></div>
10 <span style="color: grey; font-size: 10pt;">ERP for ABC Company & XYZ Partner [Oppt]
11 </span>
12 <div style="background-color: #f5f5f5; padding: 3px; border-style: solid; border-color: rgba(34, 36,
13 38, 0.1); border-width: thin; border-radius: .28571429rem; -webkit-transition: background .1s
14 ease; margin-top: 3px; margin-bottom: 3px;"><span style="color: darkgreen; font-weight: bold;
15 font-size: 12pt;">$166,000</span><span style="float: right; font-size: 12pt; font-weight: bold;">
16 9/23/2022</span></div>
17 <br />
18 <div style="margin-bottom: 9px;">CLOSED WON (100%)<br /> 46387 NS Partner (SI)</div>
19 <div style="border-top: 1px solid rgba(34,36,38,.1); border-top-width: 1px; border-top-style: solid;
20 border-top-color: rgba(34, 36, 38, 0.1);">
21 <div style="float: right;">Last updated: 3/18/2023</div>
22 </div>
23 <div style="margin-top: 3px;"><a href="#">&nbsp;  </a>&nbsp;  <a href="#"></a>&nbsp;  <a
26 href="/app/crm/calendar/call.nl?
27 status=COMPLETE&amp;l=T&amp;refresh=activities&amp;invitee=111779111&amp;company=11
28 1779111&amp;cf=1393&amp;record.title=Call&amp;record.custevent_suitecomplete_touchtype=6
29 "></a> &nbsp;  <a
30 href="/app/crm/calendar/call.nl?
31 status=COMPLETE&amp;l=T&amp;refresh=activities&amp;invitee=111779111&amp;company=11
32 1779111&amp;cf=1393&amp;record.title=Email&amp;record.custevent_suitecomplete_touchtype=
33 7"></a></div>
34 </div>
35 </td>
36 </tr>
37 </tbody>
38 </table>

```

# Adding HTML Buttons



ITEM ▲	TOTAL ORDERS	TOTAL VALUE	TOTAL QTY	AVG PER MONTH	AVG PRICE	LAST ORDER DATE	LAST ORDER	SALES ORDER LINK	SALES ORDER BUTTON	EDIT SALES ORDER BUTTON
1000L	3	2,410.00	241	10	10.00	5/22/2023	19018	<a href="#">19018</a>	<input type="button" value="19018"/>	<input type="button" value="Edit 19018"/>
1500ASYL	1	30.00	1	0.1	30.00	7/12/2023	19031	<a href="#">19031</a>	<input type="button" value="19031"/>	<input type="button" value="Edit 19031"/>
20% Off - US	3	-274.00	0	0		10/27/2022	19000	<a href="#">19000</a>	<input type="button" value="19000"/>	<input type="button" value="Edit 19000"/>
ABM100	4	230,935.50	211	8.3	1,095.00	6/1/2023	SO00001-23	<a href="#">SO00001-23</a>	<input type="button" value="SO00001-23"/>	<input type="button" value="Edit SO00001-23"/>
ACC001	1	50.00	5	0.4	10.00	1/31/2023	19014	<a href="#">19014</a>	<input type="button" value="19014"/>	<input type="button" value="Edit 19014"/>

```
'<a href="/app/accounting/transactions/salesord.nl?id=' | | {internalid} | | '&whence=" target="_blank">' | | {number} | | '</a>'
```

```
'<a href="/app/accounting/transactions/salesord.nl?id=' | | {internalid} | | '&whence=" target="_blank"><button>' | | {number} | | '</button></a>'
```

```
'<a href="/app/accounting/transactions/salesord.nl?id=' | | {internalid} | | '&whence=&e=T" target="_blank"><button>Edit ' | | {number} | | '</button></a>'
```

# Embedding Record Links in Summarized Searches



ITEM ▲	TOTAL ORDERS	TOTAL VALUE	TOTAL QTY	AVG PER MONTH	AVG PRICE	LAST ORDER DATE	LAST ORDER	SALES ORDER LINK
1000L	3	2,410.00	241	10	10.00	5/22/2023	19018	<a href="#">19018</a>
1500ASYL	1	30.00	1	0.1	30.00	7/12/2023	19031	<a href="#">19031</a>
20% Off - US	3	-274.00	0	0		10/27/2022	19000	<a href="#">19000</a>
ABM100	4	230,935.50	211	8.3	1,095.00	6/1/2023	5000001-23	<a href="#">5000001-23</a>
ACC001	1	50.00	5	0.4	10.00	1/31/2023	19014	<a href="#">19014</a>
APPAREL : Lodge Jacket : Lodge Jacket-B-M	1	254.95	1	0.1	254.95	8/12/2022	18997	<a href="#">18997</a>
Apple Watch	2	23,980.00	20	0.8	1,199.00	11/28/2022	19012	<a href="#">19012</a>

Formula (HTML)

Maximum

```
'<a href="/app/accounting/transactions/salesord.nl?id=' | | {internalid} | | '&whence=" target="_blank">' | | {number} | | '</a>'
```



# WOW! Info Card – Underlying HTML/CSS – Nothing too Complicated





```
1 <p><a class="glabel" style="font-size: 8pt; float: right; white-space: nowrap !important; color: white; font-weight: bold; background-  
color: #6f757e;">Upside</a></p>  
2 <div class="header"><a href="https://system.netsuite.com/app/common/entity/custjob.nl?id=25750936 "> Customer Name</a>  
</div>  
3 <p><span style="color: grey; font-size: 10pt;">Opportunity Title</span></p>  
4 <div class="gbar"><span style="color: #5f7d4f; font-weight: bold; font-size: 12pt;">💰 $25,000</span><span style="float: right;  
font-size: 12pt; font-weight: bold;">📅 MM/DD/YYYY</span></div>  
5 <div style="margin-bottom: 9px;">Opp Status (Probability %)<span style="float: right;">XX Days</span></div>  
6 <div style="border-top: 1px solid rgba(34,36,38,.1); border-top-width: 1px; border-top-style: solid; border-top-color: rgba(34, 36,  
38, 0.1);">City, ST  
7 <div style="float: right;">Last updated: MM/DD/YYYY</div>  
8 </div>  
9 <div style="margin-top: 3px;">&nbsp;</div>  
10 <div class="gcontainer" style="background-color: #6f757e; color: #ffffff; text-align: center; font-weight: bold; border-radius: 0px 0px  
6px 6px;">Sales Rep (Sales %)</div>
```

# Portlet Column Limit – Extend Searches with HTML



Saved search portlets support a maximum of seven columns, but you can show more data using HTML.

Customer ▲	View Customer	Project Manager	Primary Resource	Hours Remaining	Hours Allocated	# Open Cases	# Past Follow-Up Cases
ABC Company	<a href="#">View Customer</a>	Smith, Martin	Johnson, Sarah	10	90	9	2
 Acme, Inc.	<a href="#">View Customer</a>	Garcia, Kelsey	Johnson, Sarah	0	30	15	5
 Miller Group	<a href="#">View Customer</a>	Brown, Mark	Jackson, Jim	0	30	14	7

Customer Info	Support	Case Links	# Open Cases
<p><b>640383 ABC Company</b></p> <p><a href="#">View Customer</a></p> <p> <b>90 Quarterly</b></p> <p>6/1/2021 - 5/31/2026</p> <p>Support Rep: Sandoval, Esther</p> <p>Mgr: Thompson, Dan</p> <p>Tech: Hassan, Ali</p> <p>Support Tech:</p>	<p>Account Manager: Williams, Katie</p> <p><b>10 Remaining (11%)</b></p> <p>Primary Contact: Fatima Muhammad </p> <p>PM: Smith, Martin</p> <p>Primary: Johnson, Sarah</p> <p>Support:</p>	<p><b>Current Billing Period</b></p> <p><b>Support Hours Remaining</b></p> <p>Expiration Date: 5/31/2026</p> <p>Used This Period: 0</p>	<p>My Cases</p> <p>All Cases</p> <p>9</p>

# Link to Pre-Filtered Results in Another Saved Search



```
'<a href="/app/common/search/searchresults.nl?searchtype=Transaction&CN_Entity_INTERNALID=' | |{internalid}| | '&searchid=[Search ID]" target="_blank">Transaction List</a>'
```

Customer Search:

INTERNAL ID	ID	NAME	TRANSACTION LIST	TERMS	CREDIT LIMIT	BALANCE
3312	Bayer	Bayer	<a href="#">Transaction List</a>	Net 30		4,792.64
7665	Schwiezer Shokolade - CH	CH - Schweizer Shokolade	<a href="#">Transaction List</a>	Net 30		2,824.93

Transaction Search:

**FILTERS**

INTERNAL ID:  STYLE:

EDIT

EDIT   VIEW	INTERNAL ID	DATE	NAME	DOCUMENT NUMBER	TYPE	AMOUNT	STATUS	DAYS OPEN
<a href="#">Edit</a>   <a href="#">View</a>	29760	9/1/2020	Bayer Bayer	2393	Sales Order	8,152.53	Billed	0
<a href="#">View</a>	29762	9/1/2020	Bayer Bayer	3093434	Invoice	8,152.53	Paid In Full	0
<a href="#">Edit</a>   <a href="#">View</a>	29660	11/1/2020	Bayer Bayer	2373	Sales Order	8,152.53	Billed	0
<a href="#">View</a>	29662	11/1/2020	Bayer Bayer	3093414	Invoice	8,152.53	Paid In Full	0

# Using the New Formula (HMTL) Column Type [ADM1295SES]

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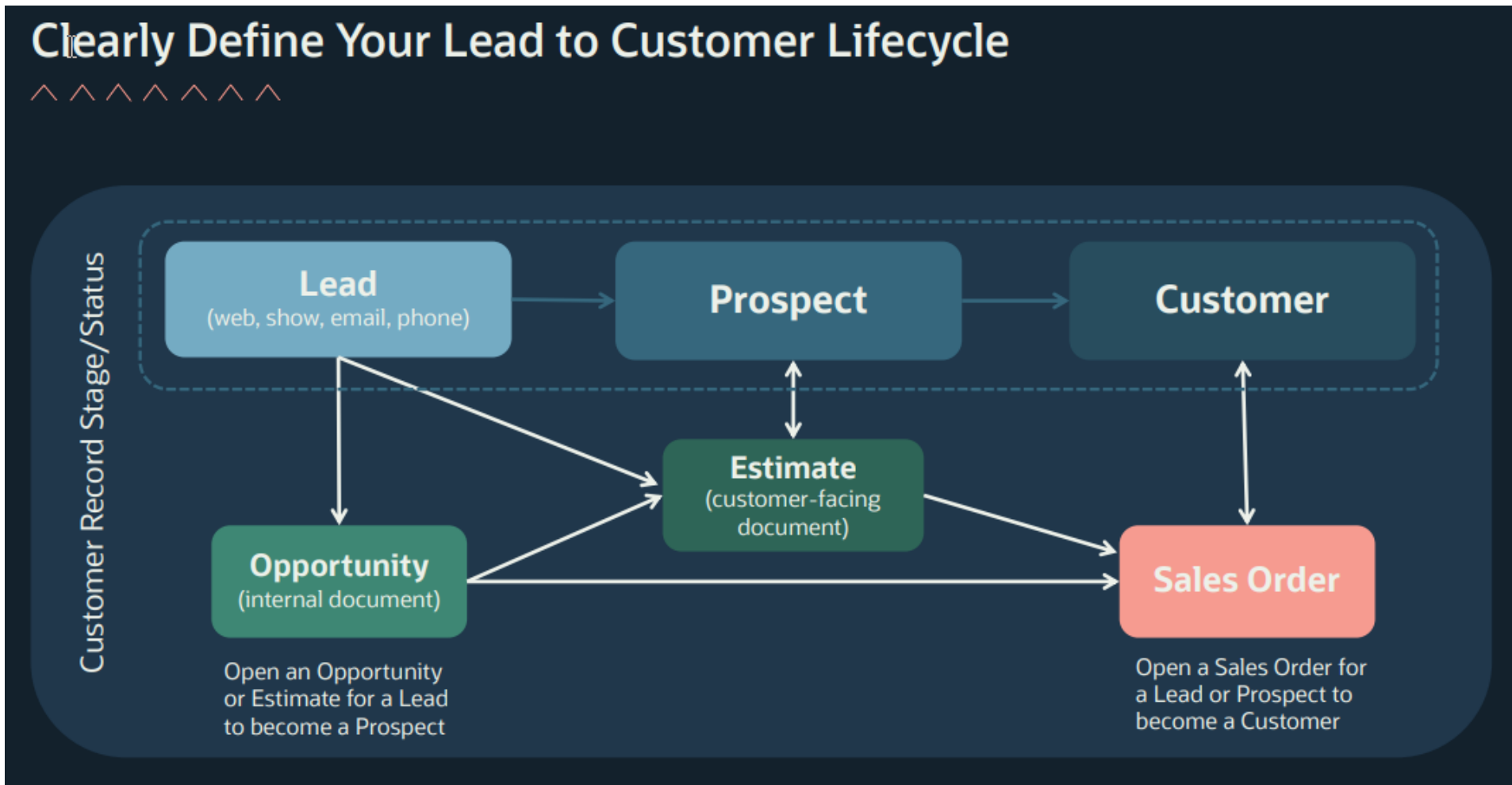
[https://static.rainfocus.com/oracle/suiteworld23/static/staticfile/staticfile/ADM1295SES\\_Final\\_1698859557540001uPHq.pdf](https://static.rainfocus.com/oracle/suiteworld23/static/staticfile/staticfile/ADM1295SES_Final_1698859557540001uPHq.pdf)



# Optimizing the Sales Team Experience with NetSuite CRM [SAL1176SES]



## Clearly Define Your Lead to Customer Lifecycle



# Set Clear Goals Using Quota Management



- Easily create quotas for items, classes, locations, or departments
- Standard reporting options:
  - Forecast vs. Quota
  - Class
  - Department
  - Location

The screenshot shows the 'Quota' management interface. At the top, there are buttons for 'Save', 'Cancel', 'Distribute', 'Clear', and 'Actions'. The form includes several dropdown menus: 'REP' (set to 'Burt Brooks'), 'LOCATION', 'DEPARTMENT', 'CLASS', 'SUBSIDIARY' (set to 'United States'), and 'YEAR' (set to '2021'). A 'TOTAL' field is set to '200,000.00' and 'TARGET ON' is set to 'Sales'. A 'Fill Down' button is visible. Below the form is a table with 12 rows representing months and an 'AMOUNT' column. The amounts are: January (10,000.00), February (10,000.00), March (10,000.00), April (10,000.00), May (10,000.00), June (10,000.00), July (10,000.00), August (10,000.00), September (30,000.00), October (30,000.00), November (30,000.00), and December (30,000.00).

Month	AMOUNT
January	10,000.00
February	10,000.00
March	10,000.00
April	10,000.00
May	10,000.00
June	10,000.00
July	10,000.00
August	10,000.00
September	30,000.00
October	30,000.00
November	30,000.00
December	30,000.00

# Sales Rep Dashboard – My Sales and Activities

Reminders

**Reminders**

- 2 CRM - New Customers
- 1 Task to complete

**Navigation Shortcut Group**

Project Manager 1

**Transactions**

- Journal Entries
- Bank Reconciliation
- Currency Revaluation

**Reports**

- Bank Register
- General Ledger
- Cash Flow Statement

**Master Data**

- Accounts
- Amortization Schedule
- Allocation Schedule

**Tiles**

- Forecasts
- Open Quotes
- Open Sales Orders
- Open Invoices



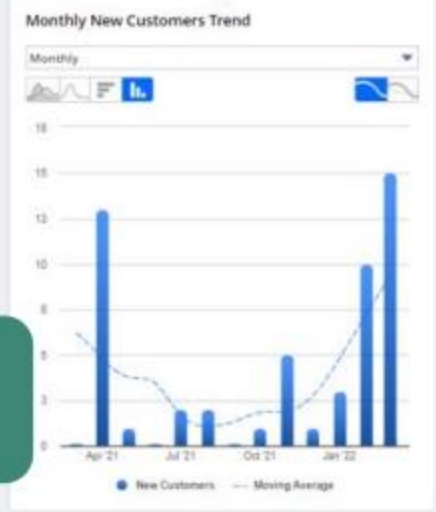
Manage Orders

**Key Performance Indicators**

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
My Sales	This Month vs. Same Month Last FQtr to Date	\$237,960	\$39,379	↑ 504.3%
My New Leads	Today vs. Yesterday	2	0	↑ N/A
My New Business	This Month vs. Same Month Last FQtr to Date	\$0	\$20,579	↓ 100.0%
My New Customers	This Month vs. Same Month Last FQtr to Date	1	0	↑ N/A
	This Week vs. Last Week	1	0	↑ N/A
	This Month vs. Last Month	\$825,565	\$150,329	↑ 449.2%
	This Month	\$237,960		
	This Month vs. Last Month to Date	1	0	↑ N/A
	This Month vs. Same Month Last FQtr to Date	0		
	This Month vs. Same Month Last FQtr to Date	0		

Key Performance Indicators

New Customer Trends



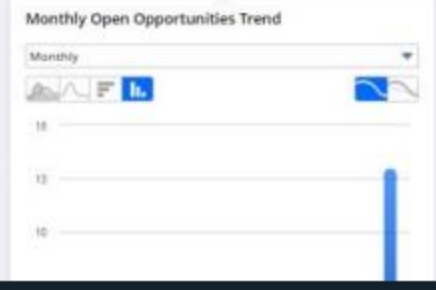
Manage Pipeline



**Summary Metrics**

- SALES: \$110,400
- NEW BUSINESS: \$0
- NUMBER OF ORDERS: 1
- Forecast: \$110,400

INDICATOR	TODAY	THIS WEEK TO DATE	THIS MONTH TO DATE	LAST MONTH TO DATE	THIS FISCAL QUARTER TO DATE	LAST FISCAL QUARTER TO DATE	THIS FISCAL YEAR TO DATE	LAST FISCAL YEAR TO DATE
Sales	\$110,400	\$110,400	\$110,400	\$500	\$110,900	\$0	\$110,900	\$0
New Business	\$0	\$0	\$0	\$500	\$110,900	\$0	\$110,900	\$0
Number of Orders	1	1	1	1	2	0	2	0
Average Deal Size	\$110,400	\$110,400	\$110,400	\$500	\$55,450	N/A	\$55,450	N/A



# Sales Manager Dashboard – My Team's Performance

Home

### Reminders

- 6 Expense Reports to Approve
- 6 Sales Orders to Approve
- 1 Return Authorization to Approve
- 3 CRM - Invoices > 30 Days > SSK

Reminders

### Tiles

Forecasts | Open Quotes | Open Sales Orders | Customer Aging

Quick Navigation

### Navigation Shortcut Group

Sales - CRM | Tools | Order to Cash | Lookups | Reports

### KPI Meter



Sales and Forecast Metrics

### KPI Meter



### Key Performance Indicators



Key Performance Indicators

INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Sales	This Month vs. Last Month to Date	\$4,071,138	\$1,518,742	↑ 168.1%
New Leads	Today vs. Yesterday	2	0	↑ N/A
New Business	This Month vs. Last Month to Date	\$884,265		
New Customers	This Month vs. Same Month Last FQtr to Date	15		
Open Estimates	This Week vs. Last Week	1		
CRM - Customer Returns by Value	This Month vs. Last Month	\$825,505		
Forecast	This Month	\$6,904,897		
Pipeline (Projected)	This Month	\$158,251		
Pipeline (Weighted)	This Month	\$37,720		
Pipeline Deals	This Month	13		
Total Pipeline Deals	Current	20		
New Opportunities	This Month vs. Last Month to Date	23	21	↑ 9.5%
Open Opportunities	This Month vs. Last Month to Date	13	0	↑ N/A

### Top 10 Customers By Balance

end of this week



Top Customers

### Monthly Sales (Orders) Trend



### Comparative Sales (Date Range: This Month vs. Last Month)

This Month vs Last Month





# Intelligent Recommendations



NetSuite AI recommends the best products or services for your customer

Items Promotions Shipping Billing Accounting Relationships Communication Related Records System Information

DISCOUNT ITEM  RATE

Add Multiple Upsell Items **Intelligent Recommendations<sup>10</sup>** Refresh Items from Project Clear All Lines

ITEM*	COMMIT	FULFILLED	INVOICED	BACK ORDERED	QUANTITY	DESCRIPTION	SERIAL/LOT NUMBERS	PRICE LEVEL	RATE	AMOUNT	COMMIT
1001		0	0		1			Base Price	4.25	4.25	Available Qty
1002		0	0		1			Base Price	7.65	7.65	Available Qty



### Intelligent Recommendations

RECOMMENDATIONS BASED ON

ITEM NAME/NUMBER	DISPLAY NAME	PRICE PER UNIT	BASED ON	QUANTITY AVAILABLE	QUANTITY
1285	SCOTTIE DOG HOT WATER BOTTLE	4.95	Customer Purchase Histo... Order or Cart It...	1551	- 2 +
1852	REGENCY CAKESTAND 3 TIER	10.95	Customer Purchase History	0	- 0 +
1083	HOT WATER BOTTLE TEA AND SYMPATHY	3.45	Customer Purchase Histo... Order or Cart It...	23	- 1 +
1293	HOT WATER BOTTLE I AM SO HAPPY	4.65	Customer Purchase Histo... Order or Cart It...	82	- 0 +
1212	RETROSPOT HEART HOT WATER BOTTLE	4.25	Customer Purchase Histo... Order or Cart It...	697	- 0 +
1286	CHOCOLATE HOT WATER BOTTLE	4.95	Customer Purchase Histo... Order or Cart It...	1315	- 0 +
212584	HOT WATER BOTTLE	4.95	Order or Cart Items	96	- 0 +
4558	CREAM SWEETHEART MINI CHEST	12.75	Customer Purchase History	0	- 0 +
3395	TEA TIME PARTY BUNTING	4.65	Customer Purchase History	0	- 0 +
2079	METAL 4 HOOK HANGER FRENCH CHATEAU	2.95	Customer Purchase History	0	- 0 +

Add & Close

# Last Sales Activity SuiteApp



- Use Last Sales Activity SuiteApp to understand the last interacted with a lead, prospect, customer, contact or opportunity and ensure timely follow-ups.
- Includes saved searches to identify what contacts, leads, customers, prospects or opportunities you haven't had activity within the last week.
- Use Last Sales Activity searches to for your dashboard reminders and KPIs.

Last Sales Activity

- TASKS
- PHONE CALLS
- EVENTS
- NOTES
- MESSAGES
- MARKETING CAMPAIGN
- TRACK ONLY PRIMARY SALES REP ACTIVITIES
- TRACK ONLY COMPLETED TASKS
- TRACK ONLY COMPLETED PHONECALLS
- TRACK ONLY COMPLETED EVENTS

Customer

## 8 Wolfe Industries

[Edit](#) [Back](#) | [Accept Payment](#) | [Actions](#)

**Primary Information**

Customer ID	Sales Rep
<b>8 Wolfe Industries</b>	<b>M Wolfe</b>
Type	Partner
<b>Company</b>	Web Address
Company Name	
<b>Wolfe Industries</b>	
Status	
<b>CUSTOMER-Closed Won</b>	

**Email | Phone | Address**

Email	Alt. Phone
<b>customer@wolfeindustries.com</b>	
Phone	Fax

**Classification**

Subsidiary	
<b>Sub_PSG_QA_DB95_USOW_3741526</b>	
Default Order Priority	
<b>3</b>	

**Last Sales Activity**  
**6/19/2014 Events**

# SuiteSuccess CRM Add-On



## Key Leading Practices:

- **Sales Force Automation – Lead to Quote**
  - Equip sales with real-time access to customer, opportunity, estimate and order records
  - Sales managers have a complete view of sales pipeline and sales rep forecasts
- **Marketing Automation – Marketing to ROI**
  - Automate multi-channel marketing campaigns to align with sales efforts
  - Attribute sales, MQL and SQL back to marketing campaigns
- **Customer Service – Call to Resolution**
  - Allow customer service to create support cases and manage escalations
  - Automatically assign cases to support reps

## Roles and Dashboards:

- CRM – Sales Manager
- CRM - Sales Representative
- CRM – Marketing Manager
- CRM – Customer Service

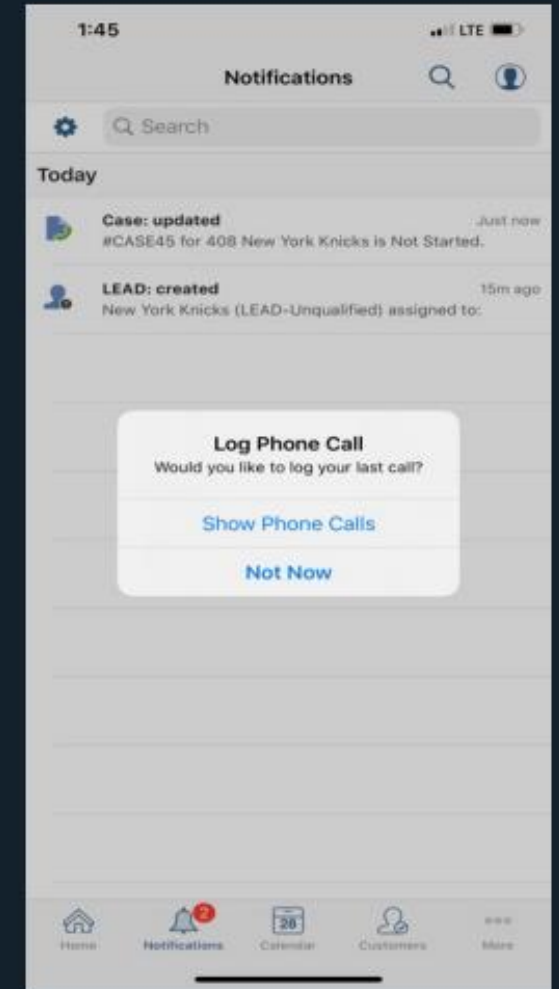
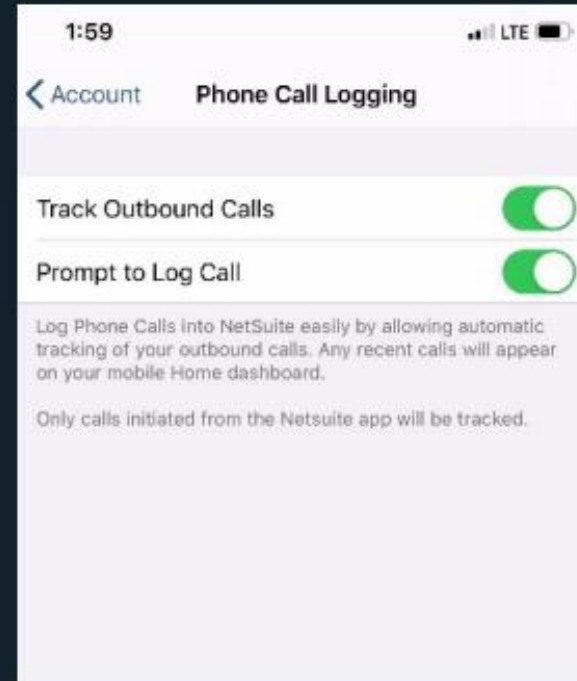
## CRM Workbooks SuiteApp:

- Monthly Opportunities – Won vs Lost
- Top 5 Monthly Open Opportunities
- Top 5 Monthly Opportunities Won
- Opportunity Forecast
- Monthly Open Quote Value
- Monthly Quotes to Sales Conversion
- Top 5 Sales Activity by Rep
- Top 10 Customers by Sales
- Top 5 Reps by Sales
- Sales Reps Transaction Detail and Summary

# Mobile iOS Phone Call Logging



- Log calls that are initiated from the NetSuite App
- Easily create new contacts
- Simultaneously create tasks and new activities right from the mobile app



# SuiteScript Creation using AI

## [ADM1276SES]



## Learning

- “How would you go about using SuiteScript to track users who viewed a transaction in NetSuite?”
- “What is the difference between a User Event Script and a Client Script in NetSuite?”
- “Walk me through how to upload and deploy a SuiteScript file in NetSuite.”

## Prompting

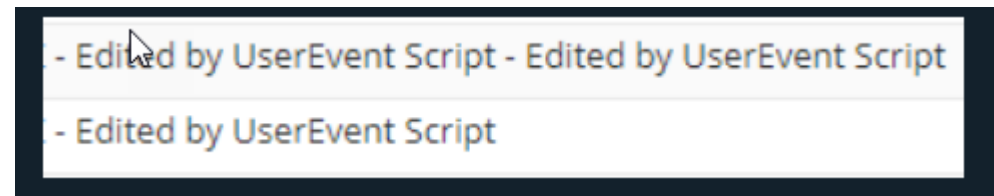
“Take into account this excerpt from an article on how to execute a NetSuite client script when viewing a record:

With that approach in mind, create a user event script using the beforeload function as the excerpt suggests that will deploy a client script on an order. The client script should get the current user's name and input it into the body memo field on an order with a timestamp.”

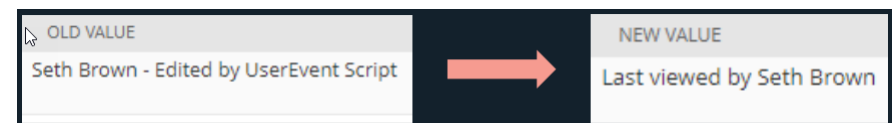
## Debugging

“I am receiving this error, TypeError: Cannot read property “SALESORDER” from undefined (/SuiteScripts/Seth\_UE.js#9)”

“The value is updating, but it is adding to the existing text in the memo field every time, I need it to replace the existing text in the memo field”



In this version of the code change the new memo from "[user] - Edited by UserEvent Script" to “Last viewed by [user]”



## Refining

- Reverse engineering a Prompt with AI

“Create a natural language prompt that will output this SuiteScript Code:

```
/**
```

```
*@NApiVersion 2.x
```

```
*@NScriptType UserEventScript
```

```
*/
```

```
Define(['N/record', 'N/log', 'N/runtime'], function(record, log, runtime){  
    function beforeLoad(context) { .....”
```

- Response

"Write a SuiteScript using the Netsuite's NApiVersion 2.x for a UserEventScript. In the script, import the record, log, and runtime modules. Define a beforeLoad function that runs only when a sales order record is viewed. Within this function:

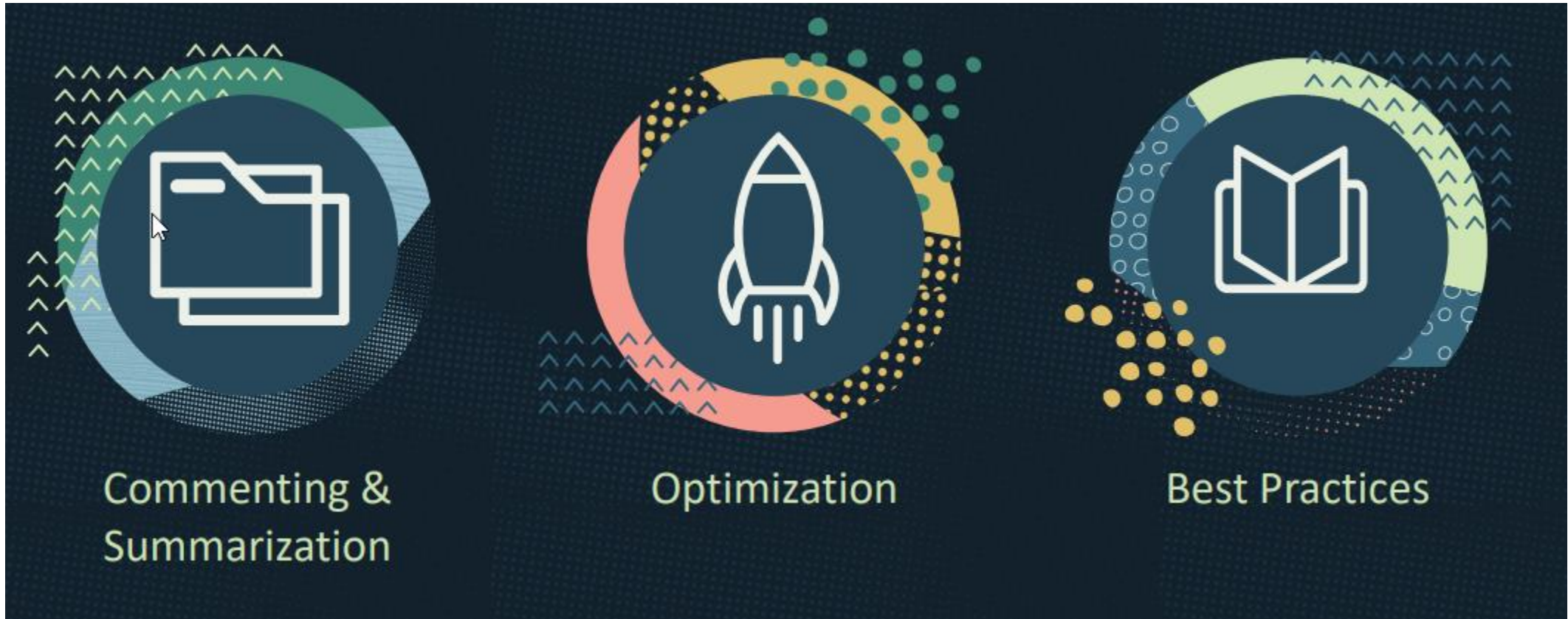
1. Check if the current context type is 'VIEW' to ensure it's only executed when viewing the record.
2. Fetch the ID of the sales order record currently being viewed.
3. Load the sales order and retrieve the value of its 'memo' field, then log the current memo value for debugging purposes.
4. Get the name of the current user.
5. Update the 'memo' field of the sales order with a new value indicating the record was 'Last viewed by [current user's name]', then save the record.
6. Load the sales order again to verify that the 'memo' field was updated successfully. Log the updated memo value for debugging.

Lastly, return the beforeLoad function as the export for the script."



# Developer Pro Tips

For success using AI to create  
& deploy SuiteScript



# Commenting

## AI-generated commenting



Before

```
1  /**
2   * @NApiVersion 2.x
3   * @NScriptType UserEventScript
4   * @NModuleScope SameAccount
5   */
6  define(['N/record', 'N/log', 'N/runtime'],
7
8  function(record, log, runtime) {
9
10     function afterView(context) {
11         if (context.type !== context.UserEventType.VIEW) {
12             return;
13         }
14
15         var salesOrderId = context.newRecord.id;
16
17         var salesOrder = record.load({
18             type: record.Type.SALES_ORDER,
19             id: salesOrderId
20         });
21
22         var currentMemo = salesOrder.getValue({
23             fieldId: 'memo'
24         });
25
26         log.debug({
27             title: 'Current Memo Value',
28             details: currentMemo
29         });
30
31         var currentUser = runtime.getCurrentUser().name;
32
```

After

```
6  define(['N/record', 'N/log', 'N/runtime'],
7
8  function(record, log, runtime) {
9
10     /**
11      * Function to be executed after record is viewed.
12      *
13      * @param {Object} context - Script context
14      */
15     function afterView(context) {
16
17         // Check if the event type is 'VIEW'
18         if (context.type !== context.UserEventType.VIEW) {
19             return;
20         }
21
22         // Retrieve the ID of the sales order being viewed
23         var salesOrderId = context.newRecord.id;
24
25         // Load the sales order record using its ID
26         var salesOrder = record.load({
27             type: record.Type.SALES_ORDER,
28             id: salesOrderId
29         });
30
31         // Retrieve the current value of the 'memo' field from the sales order
32         var currentMemo = salesOrder.getValue({
33             fieldId: 'memo'
34         });
35
36         // Log the current value of the 'memo' field for debugging purposes
37         log.debug({
38             title: 'Current Memo Value',
39             details: currentMemo
40         });
41
42         // Get the name of the current user
43         var currentUser = runtime.getCurrentUser().name;
44
```

## Summarization

AI-generated summary for easier understanding



*This code is associated with a NetSuite User Event Script that activates when someone views a Sales Order record in the system.*

Here's a step-by-step breakdown of what happens:

- 1. Activation Condition:** The script checks if a Sales Order record is being viewed. If not, it stops right there and does nothing further.
- 2. Loading the Record:** If the record is being viewed, the script loads that specific Sales Order based on its unique ID.
- 3. Checking the Memo:** The script then looks at the 'memo' field of the Sales Order to see its current content. For reference, it logs this content, which means it keeps a record of it in the system logs. This is useful for debugging or tracking purposes.

- 4. Updating the Memo:** The script identifies who is currently viewing the Sales Order (the user's name) and updates the 'memo' field to state that this specific user was the last one to view the record. For example, if "John Doe" viewed the Sales Order, the 'memo' might be updated to say "Last viewed by John Doe".
- 5. Saving the Changes:** After updating the 'memo', the script saves the Sales Order so that the changes are stored in the system.
- 6. Double-Checking the Update:** To ensure the 'memo' was updated correctly, the script reloads the Sales Order and checks the 'memo' field again. It then logs the updated content for reference.

A developer will know the best practices based on load time efficiency.

^^ ^^ ^^ ^^ ^^ ^^ ^^

“Optimize the code to use an inline edit approach with the record.submitfields call instead of record.load”

^^ ^^ ^^ ^^ ^^ ^^ ^^

“Perform a safety review of the script and identify any negative impacts it could have in a production environment as is.”

## Optimization

AI-generated safety review & considerations for your SuiteScript



### Performance Impact:

Every time a user views a Sales Order record, the script will execute. If there are many users frequently viewing Sales Order records, this could lead to performance issues. The script will make an update to the record, which can be resource-intensive, especially during peak times.

### Data Integrity:

The script overwrites the 'memo' field every time a Sales Order is viewed. This means any previous information in the 'memo' field will be lost. If the 'memo' field is used for other purposes, this could lead to data loss.

If multiple users view the same Sales Order record simultaneously, the 'memo' field might not accurately reflect the last viewer due to race conditions.

### User Experience:

Since the script updates the record every time it's viewed, the last modified date of the Sales Order will change, which might confuse users. They might wonder why the record was modified when they only viewed it.

If users rely on the 'memo' field for other information, they might be surprised or frustrated to find it overwritten with the "Last viewed by [user]" message.

### Error Handling:

The script lacks error handling. If there's an issue with updating the 'memo' field (e.g., due to permissions, field length limits, or other reasons), the script might fail silently or disrupt the user's experience.

Continued ..



### Permissions:

The script assumes that the current user has the necessary permissions to update the Sales Order record. If they don't, the script will fail.

The script also assumes that the user has permission to view the 'memo' field. If not, this could lead to errors.

### Scalability:

If the organization has a large number of Sales Order views in a short time, the script could contribute to script governance limits being reached

### Recommendations:

1. **Limit Execution:** Consider adding conditions to limit the execution of the script. For example, only run the script for specific roles, departments, or subsidiaries.
2. **Preserve Data:** Instead of overwriting the 'memo' field, consider appending to it or using a custom field specifically for tracking the last viewer.
3. **Error Handling:** Implement error handling to gracefully handle any issues that arise during the script's execution.
4. **User Notification:** Inform users about the functionality of this script, especially if they rely on the 'memo' field for other purposes.
5. **Optimization:** Instead of loading the record again after updating to get the updated 'memo' value for logging, you can simply log the new value you set, which will reduce one operation.

Before deploying any script in a production environment, it's crucial to test it thoroughly in a sandbox or development environment to ensure there are no unforeseen issues.

## Best practices for Integrating AI into your Deployment Processes



- For organizations with established change management processes in place, AI-generated code should go through the same rigorous change management.
- Organizations without an established change management process should take these considerations:
  - Have your code reviewed and approved by an experienced developer
  - Thoroughly test your code in a Sandbox Environment

# SuiteScript Creation using AI [ADM1276SES]

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[https://static.rainfocus.com/oracle/suiteworld23/static/staticfile/staticfile/ADM1276SES\\_Final\\_1698859555174001umMg.pdf](https://static.rainfocus.com/oracle/suiteworld23/static/staticfile/staticfile/ADM1276SES_Final_1698859555174001umMg.pdf)





# NetSuite Suiteflow: Tips for Creating Effective Workflows [ADM1630SES]

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Excellent AR automation example - outstanding invoices

Report on the number of reminders by customer

After record submit - is essentially a double save - it is required in some situations like retrieving an internal id

Troubleshooting - system information - workflow history

Scheduled workflows - the saved search should have a small amount of records

Turn off execution logging

Click on more -> instances and history records. What is the number of active workflows - is it high? Start and set the delete finished workflows.

APM - Application Performance Monitor (SuiteApp)

# Maintaining Peak Performance as your Business Scales [ADM1279SES]

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Use NetSuite for NetSuite

Don't build a system within a system

Clean up the file cabinet

Move to non-real time / batch (Map / Reduce)

Thoughtful integration - do we schedule Boomi outbounds to after hours?

Re saving a transaction multiple times - why does our ship to address get updated many times?

Custom records vs transaction growth - look at master data like customers, items - inactivating data

Load testing

Turn off/down some things during peak periods

Get an early SB release update for proper New Release testing

Consolidate the subtabs on forms

Build a special purpose form - like for sales order entry

Convert some workflows to scripts - better performance

After Submit - bad, try hard to avoid

Customer Example - moved sales order entry outside of NetSuite

Vinay - from Toronto, excellent presentation

# SuiteWorld On-Air

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# Agenda for November 16, 2023

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**9:00 – 9:10 Welcome**

**9:10 – 9:50 Review of SuiteWorld and On-Air**

Presentation by: Mark Tanner, ONSUG Co-Chair

**9:50 – 10:00 Netgain – Meeting Sponsor**

Presentation by: Chris Miller, SVP of Product Strategy

**10:00 – 10:45 NetSuite 2023.2 Features**

Presentation by: Gavin Davidson, ONSUG Co-Chair

**10:45 – 11:00 Tips and Tricks**

Presentation by: Mark Tanner, ONSUG Co-Chair (on behalf of Lisa Reed, ONSUG Treasurer)

**11:00 – 12:00 In-Person Networking**



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# NetSuite 2023.2 Release Highlights

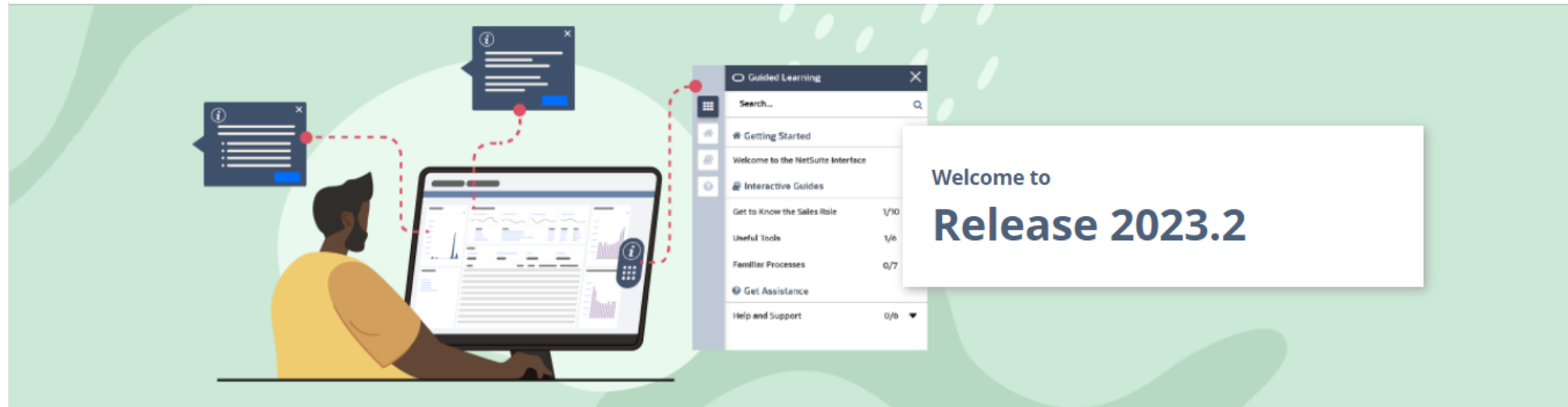
Gavin Davidson



Material Science for Building Materials



# New Release Portlet



## Gain Warehouse and Manufacturing Efficiency

From the NetSuite Supply Chain Management mobile app perform multiple functions with ease by changing roles between NetSuite WMS, QMS, Manufacturing Mobile, Smart Count, and Ship Central. Assign pickers to multiple pick tasks with NetSuite WMS to improve productivity. Compare shipping rates between multiple carriers in NetSuite Ship Central. Scan GS1 barcodes with NetSuite Smart Count.

[Learn more](#)

## Drive Smart Financials and Operational Excellence

NetSuite Account Reconciliation standardizes and automates the complex process of reconciling all balance sheet accounts for a faster financial close. NetSuite AP Automation now allows users to submit and approve payments in batches with flexible approval routing options. Added intelligence in NetSuite Bill Capture categorizes bills by subsidiaries based on historical data and similar bills.

[Learn more](#)

## Empower and Engage Employees

Maximize your ERP investment by helping users quickly learn how to use NetSuite features. NetSuite Guided Learning provides interactive guides that allow users to learn key processes while in their flow of work within NetSuite. Guided Learning also connects users to additional learning resources such as on-demand Learning Cloud Support training, SuiteAnswers, and the NetSuite Support Community.

[Learn more](#)

# SuiteApp.com - Built for NetSuite Program




Built for  
**ORACLE  
NETSUITE** 

Native SuiteApp

Built for  
**ORACLE  
NETSUITE** 

Integrated SuiteApp

Built for  
**ORACLE  
NETSUITE** 

Hybrid SuiteApp

Preferred	Blah	Ok
<ul style="list-style-type: none"><li>• The entire solution resides on the SuiteCloud platform.</li><li>• SuiteApp is deployed to customers' accounts via the SuiteBundler or SuiteApp Framework.</li><li>• All components are within the scope of BFN review.</li></ul>	<ul style="list-style-type: none"><li>• The majority of the solution resides externally to the NetSuite platform.</li><li>• This is a separate solution with data integration to NetSuite, via a custom integration, or via a generic connector.</li><li>• The scope of BFN review is only upon the integration components of these solutions</li></ul>	<ul style="list-style-type: none"><li>• These solutions are a mix of platform resident components and external components.</li><li>• These are separate solutions integrated with NetSuite via custom UI and/or internal and external data.</li><li>• The scope of BFN review is only upon the native components and integration components of these solutions.</li></ul>



# How I evaluate New Features

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- Native – Built on the Platform
  - Anything built in NetSuite core
  - Anything built on the platform
    - NetAsset etc.
- Hybrid
- Integrated
  - NSAW
  - NSPB

# Top New (or updated) Features: SuiteApps

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- Transaction Line Distribution
- Costed BOM
- Item 360
- Smart Count
- Work Order Traveller Report
- Rebate & Trade Promotions

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# Other Top New Features

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- NetSuite ShipCentral
- Account Reconciliation
- Bill Capture & AP Automation (Not in Canada)
- Guided Learning

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# NSAW Updates

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- Embed metrics in NetSuite dashboards
- Manage Users in NetSuite
- Multiple NetSuite instances

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# What is NetSuite saying?

## NetSuite 2023 Release 2 Highlights

- Smart Financials & Operational Excellence**
- NetSuite Account Reconciliation
  - NetSuite Bill Capture

- Warehouse & Manufacturing Efficiencies**
- NetSuite Ship Central
  - Supply Chain Manufacturing Mobile App

- Empower & Engage Users**
- NetSuite Guided Learning

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See all the release details at [Netsuite.com/sneakpeek](https://netsuite.com/sneakpeek) or by viewing our 23.2 Release Overview on-demand webinar available in the resources widget



Trusscore is a material science company focused on developing sustainable building materials.

We're starting a journey to change the way people build buildings and the environmental footprint left behind when they do. We're investing in R&D and bringing material science to our formulations—making it even more functional and beautiful.

 **trusscore**  
material + science

[trusscore.com](https://trusscore.com)



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# Tips and Tricks

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- Lisa's Tips and Tricks doc
- Add a Navigation Portlet shortcut
- Formula (HTML) example
- 50 NetSuite Security Tips in 50 Minutes (Suiteworld 2023)
- Find an Enable feature, Setup > Setup Manager and use the search bar
- Add Center Tabs and expand your Dashboard portlets
  - Don't forget the Customer and Vendor Dashboards
- Inline HTML field type