

Agenda for October 20, 2022



Special Thanks to our Meeting Sponsors



Agenda for October 20, 2022

- **SuiteWorld 2022 Review**
- Presentation by: Mark Tanner, ONSUG Co-Chair and Rajneesh Kumar, ONSUG Co-Webmaster
- **SuiteWorld On Air 2022 Review**
- Presentation by: Durrell Martin, ONSUG Co-Webmaster
- **Beanworks and YayPay – Meeting Sponsor**
- Presentation by: Andre Pietramala from Beanworks and Joelle Ourtiague from YayPay
- **NetSuite Cash 360 – Install, Configuration and Overview**
- Presentation by: Durrell Martin, ONSUG Co-Webmaster
- **Demand Driven – Meeting Sponsor**
- Presentation by: Brittany Bader – Account Executive and Chris Knapp – VP of Sales
- **Bring a Question**
- Discussion lead by: Mark Tanner, ONSUG Co-Chair

SuiteWorld 2022 Review



- 8,000 in attendance? Sold out
- Logistics were (mostly) fantastic
 - Good to know : stay on the Flamingo side of Las Vegas BLVD
 - Session rooms were central
- Difficult to see all sessions you'd like to
 - Good to know : jump on the agenda builder
 - Slides are available in Suite Answers (search for "SuiteWorld")
- Exhibitor hall
 - "always" open
 - Great one on one conversations
 - Meeting contacts face to face
 - Lots of swag
- Wednesday night parties
 - Unique opportunities
 - Ride the High Roller, Bowling, Bellagio fountain balcony, Paris rooftop
- Thursday at "The Party"
 - Nelly was entertaining
 - Good networking
- Travel
 - Swoop air (~\$500 return)
 - Caesar's ~\$300 USD / night, Linq ~\$100



SuiteWorld 2022 Review

- Themes

- AP Automation
- CPQ
- Data Analytics warehouse
- Ship Central
- SuitePeople Workforce Management
 - Time tracking
- “Everything ties back to the financials”

- More User Group involvement
- Data centres being added to Toronto and Montreal (OCI)
- New interface coming (Redwood)
 - “next generation” of customizations - wow
 - In context customizations
 - Emphasis on Insights



SuiteWorld 2022 Review

- Live Sessions vs On Air
 - Questions, live demos, stories, networking
 - Personally, I'll keep going to SuiteWorld in person for the Live sessions
- My session highlights
 - 50 NetSuite Security Tips and Tricks in 50 Minutes (ADM1239SES)
 - Great advice around roles
 - NetSuite Security Matrix -> Fastpath -> <https://www.gofastpath.com/netsuite-security-matrix>
 - CRM Panel (SAL1124SES)
 - Using saved searches to pull activities, engagement and scheduling heads-up for meetings
 - Why not Salesforce? Financial information, can't have everything in 2 systems, reduce the number of clicks
 - If it's not in NetSuite it didn't happen
 - Leverage custom record (profiling), workflows (opportunities and automation), KPI reporting
 - Mobile App workshop
 - IOS and Android support (more options on IOS)
 - Expenses, Events, tasks, KPI dashboards



SuiteWorld 2022 Review

- It's 3am, What is your Admin doing? (ADM1549SES)
 - Treat NetSuite like a good kid who sometimes breaks curfew
 - Keep it safe, establish trust, and avoid late-night surprises
 - Proactive tools: Staffing & planning, Limit Complexity, Testing & Sandbox, APM & Monitoring, Use known Solutions
 - Slides are very good
- Rebate and Trade Promotions (SuiteApp, coming soon) (OPS1157SES)
 - Vendor and Customer rebate tracking
 - Great solution coverage – full lifecycle

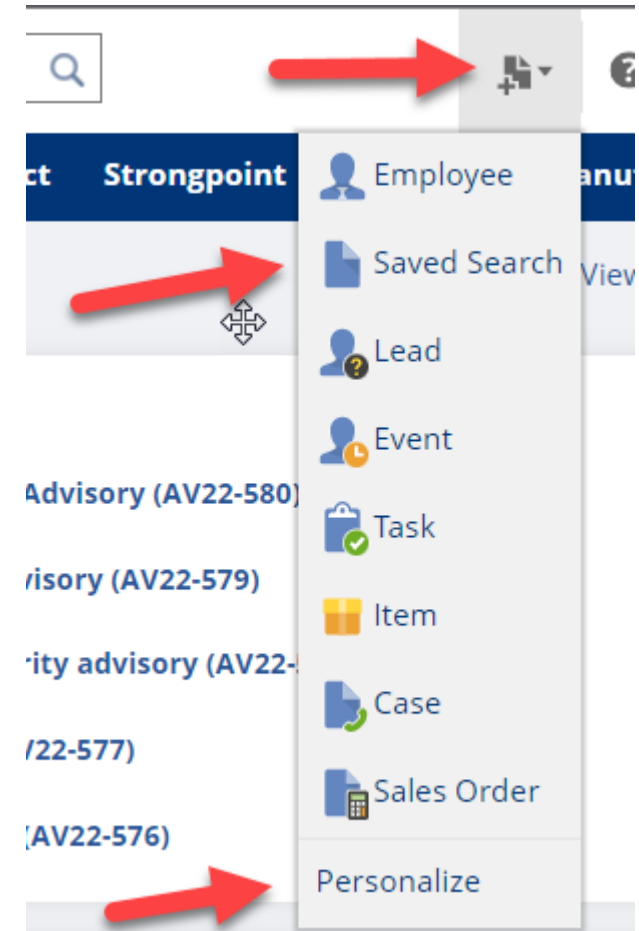


SuiteWorld 2022 Review

- Financial Saved Searches – taking them from good to great (WKS1593WRK)
 - Add saved search to the personal menu
 - Saved search naming
 - MT – Customers with no preferred shipping location
 - Click on total in a summary result to see the complete data
 - Using Min / Max on date fields
 - W3schools.com -> search for SQL
 - Links to Suite Answer documents, <https://tinyurl.com/SStipsandtricks>



10/18/2022	Tolleson : 2371 - Re
10/18/2022	Tolleson : 3371 - Re
10/18/2022	SouthGate : 1126 -
Total	



The screenshot shows the SuiteWorld interface. A search bar is at the top left. A dropdown menu is open, showing options like Employee, Saved Search, Lead, Event, Task, Item, Case, Sales Order, and Personalize. A table is visible below the dropdown menu, with a 'Total' row highlighted. Red arrows point to the search bar, the dropdown menu, and the 'Total' row.

SuiteWorld 2022 Review

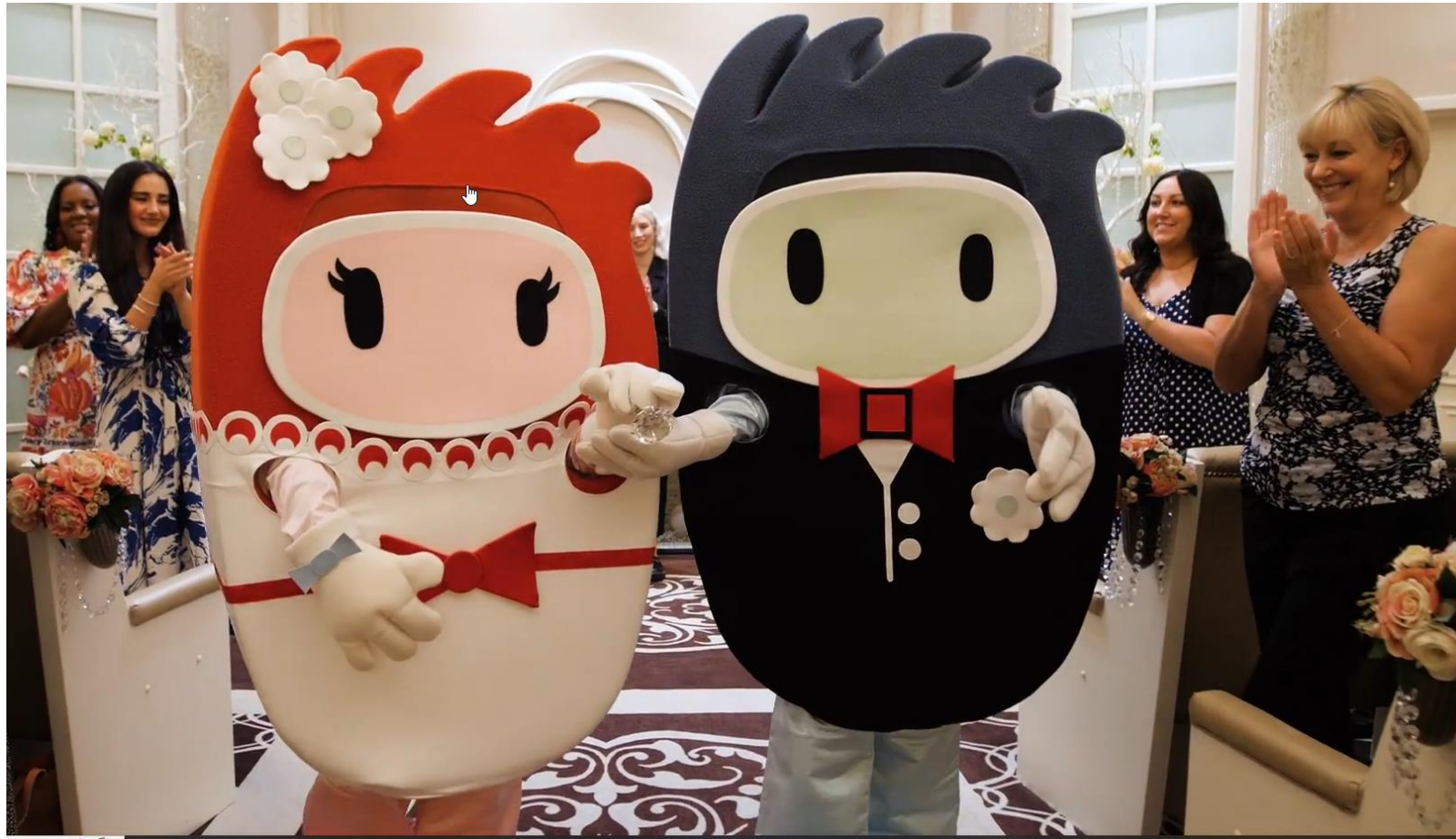
Useful SuiteAnswer Articles

- Summary Type Example Screenshots – Article ID 8445
- Summary Type Descriptions – Article ID 8444
- SQL Expressions – Article ID 10101
- Formulas in Search – Article ID 8451
- Using a Formula in Search Criteria – Article ID 8449
- Search Formula Examples and Tips – Article ID 8439
- Create EBITDA Saved Search and Show it as a Dashboard Custom KPI – Article ID 37870
- Saved Search for All Cash Disbursements – Article ID 72948
- Transaction Search to Replicate the Income Statement – Article ID 25580
- Create Transaction Search that Matches Balance Sheet – Article ID 64974

SuiteWorld 2022 Review

- Maximize your value from the SuiteCloud platform with NetSuite records (DEV1282SES)
 - Challenges today:
 - How to accurately depict the model that I'm focused on
 - How do I make sure that my scripts always run?
 - Inconsistencies between Standard and Custom records
 - Uniquely identify fields between different product areas (ie CSV import and record form)
 - New Records Catalog in 2022.2, under Setup -> Records Catalog
- Extended Transaction lines (ADM1186SES)
 - Interesting addition for Upsell, Cross-Sell and Bundle sales
- Building your first project with SDF and SuiteScript (DEV1226SES)
 - Was OK but there are better tutorials out there

Suite Stanley and Sally get married



Misc



Open Board position:

Co-Chair

Recording Secretary

Co-Speaker Chair

Meet in person? Hybrid

Virtual meet and greet sessions – Bring a Question sessions

Save-the-Date: Next Meeting

JANUARY

2023

CALENDAR

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Ask us a question!

