ATLANTA NETSUITE USERGROUP & MERCHANTE℠

Present

SuiteWorld Highlights Recap

Agenda

- Welcome & User Group News
- Introductions
- SuiteWorld Highlights
- Questions/Open Discussion
- Adjourn

What is the ATLANTA NETSUITE USERGROUP

- A **locally based** user group in Southeast United States
- **Independent, s**upported by Oracle NetSuite, Inc., but no official affiliation
- **Networking** to encourage interaction between fellow NetSuite users
- **Carolinas NetSuite User Group:** Are you interested in a new user group to serve the Carolinas?
- **For more info:** Cathryn Matarazzo cmatarazzo@merchante.com

SuiteBanking

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SuiteBanking

- Accounts Payable Automation
- Accounts Receivable Automation
- Spend Management
- Financial Service Integration

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SuiteBanking

Banking | Credit Card

Bank Information

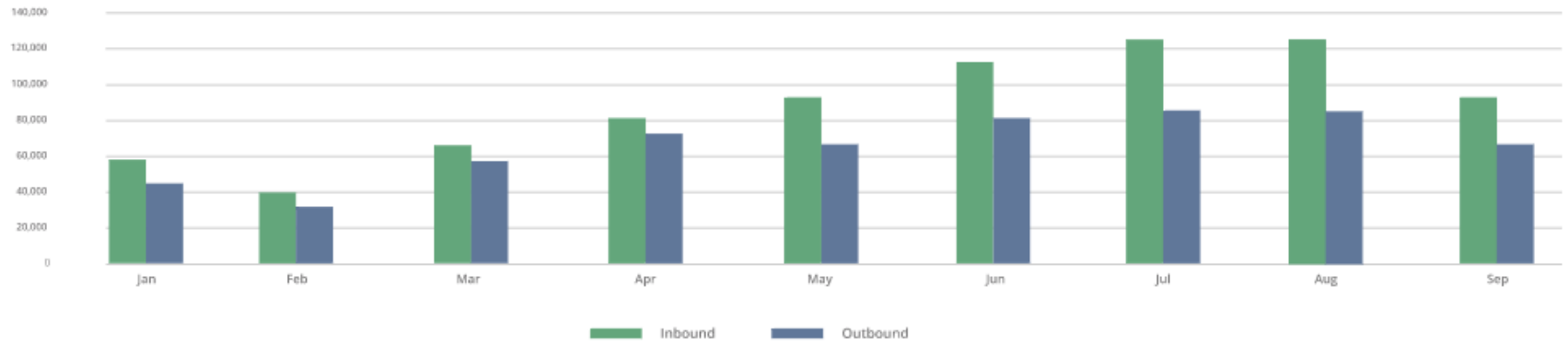
Account Number: xxxx9630
Financial Institution Number: 212233565
Currency: USD
Current Balance: $88,460.00
Available Balance: $84,520.00
Funds On Hold: $925.00

Bank Statements

2021

DATE	STATEMENT
9/30/2021	View | Download
8/31/2021	View | Download
7/31/2021	View | Download
6/30/2021	View | Download
5/31/2021	View | Download
4/30/2021	View | Download
3/31/2021	View | Download
2/28/2021	View | Download
1/31/2021	View | Download

Incoming vs Outgoing Funds - 2021



Transactions

Outbound | Inbound

DATE	PAYEE	AMOUNT	PAYMENT TYPE	REFERENCE	STATUS
10/21/2021	BasicOne	689.00	Check	10754	Outstanding
10/21/2021	Cables R Us	825.00	ACH	4562589870003	In Process
10/14/2021	Cables R Us	732.00	ACH	4562589870002	Settled
10/14/2021	BasicOne	1,245.00	ACH	4562589870001	Settled
10/14/2021	XiTwo	459.00	Check	10753	Outstanding
10/14/2021	Sim Co	371.00	Check	10752	Settled
10/14/2021	XiTwo	264.00	Check	10751	Settled

SuiteAnalytics Warehouse

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SuiteAnalytics Warehouse

- Pre-Built Analytics
- Easy and Secure Data Transfer
- Combine NetSuite & Third-party Data
- Pre-built Role Based Metrics & KPIs

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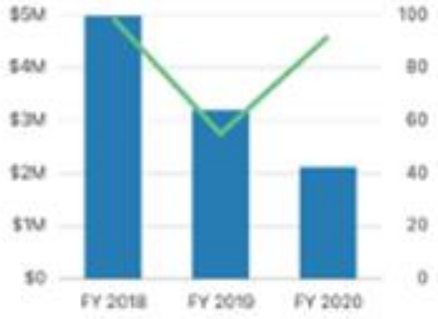
Customer Overview

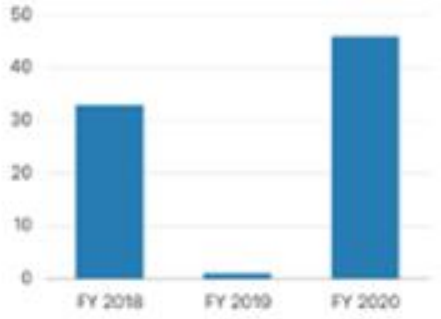
Sales Orders

$418K
FY 2020



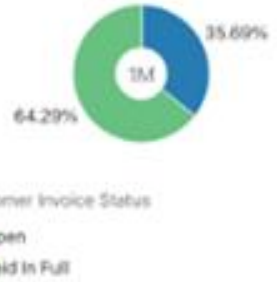
Fulfillments

46
FY 2020



Invoices

$15K
FY 2020

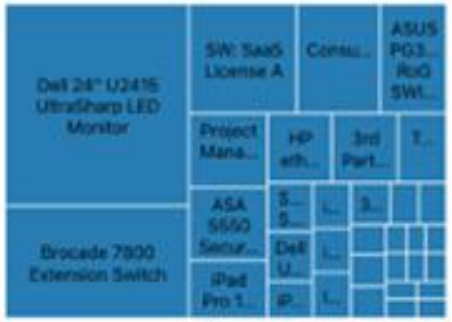


Returns

$3K
FY 2020

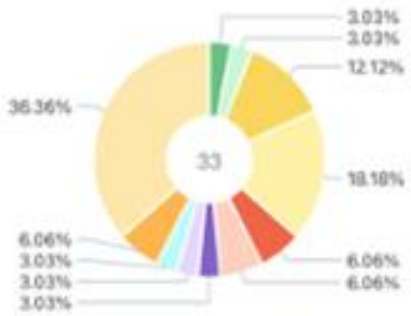
Top Sold Items

246
FY 2020



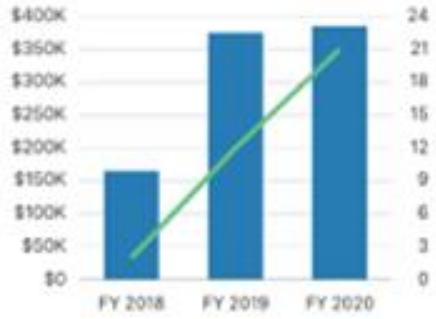
Top Returned Items

33
FY 2020



Overdue Invoices

$386K
FY 2020



Payments

$15K
FY 2020

Paid In Full

Sales Order Analysis

Sales Order - Fully Shipped/Received/Picked Up: All Item - Is Drop Ship Item: All Year: 2019, 2020, 2021

Sales Order by Status

Sales Representative Identifier: Ed Sullivan

Sales Representative Identifier: Ed Sullivan
# of Sales Orders
24

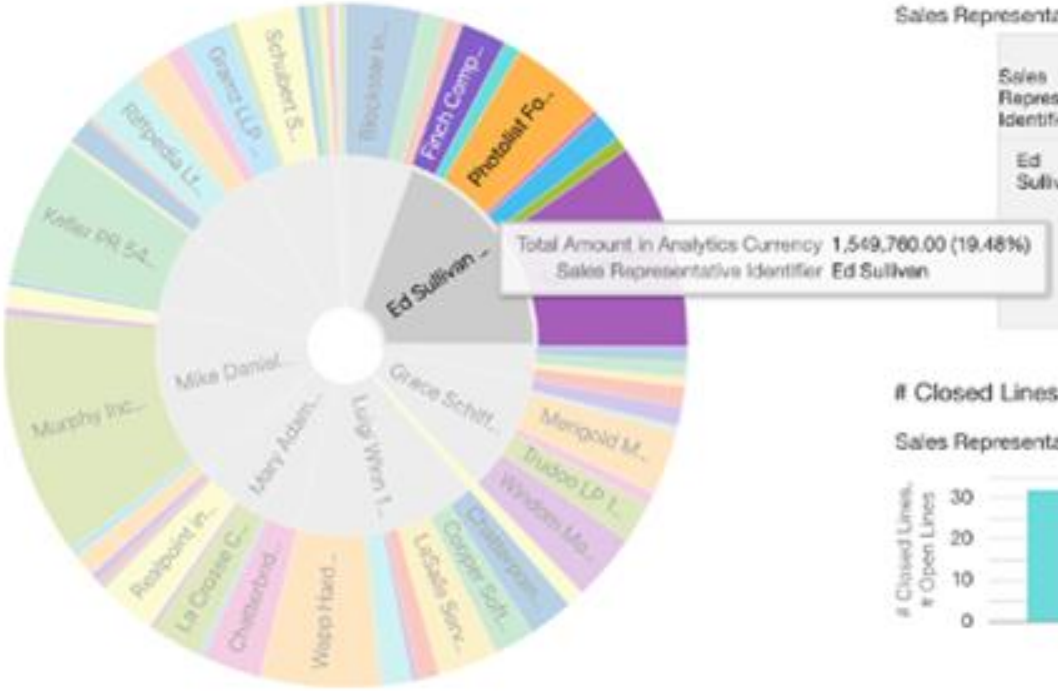
Sales Representative Identifier: Ed Sullivan
% Closed Lines
100.00%

Sales Representative Identifier: Ed Sullivan
 # Sales Order Lines
96

Sales Representative Identifier: Ed Sullivan
% Closed Orders
100.00%

Sales Representative Identifier: Ed Sullivan
 # Closed Lines
96

Total Amount in Analytics Currency by Sales Representative Identifier, Custom...



Total Number of Sales Orders, Average Order Amount in Analytics Currency, Total Amount in Analytics Currency by Total Amoun...

Sales Representative Identifier: Ed Sullivan

Sales Representative Identifier	Customer Identifier	Total Number of Sales Orders	Average Order Amount in Analytics Currency	Total Amount in Analytics Currency
Ed Sullivan	Finch Computing	28	$6K	170,660.00
	N&L Lyons Ltd	4	$16K	63,960.00
	Photolist Foundation	20	$18K	351,780.00
	Riffpath Co.	4	$6K	24,380.00

 # Closed Lines, # Open Lines, % Closed Orders by Month Name

Sales Representative Identifier: Ed Sullivan

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SuiteWorld

The Admin's Guide to Customizations and the SuiteCloud Development Framework

Summarized / Edited by Amie Minton

Original Presentation by:

Phil Cutler
Software Architect

SuiteSuccess

ORACLE NETSUITE

Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

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Key Takeaways

- SuiteBundler is still supported, but it will not be updated with any new features.

- **SuiteCloud Development Framework (SDF)** is a technology that enables Admins to move customizations to and from different accounts, such as from Sandbox to Production

- Using IDEs *(Integrated Development Environment)* like WebStorm or VSCode, multiple customizations can be moved between accounts in the form of ACPs *(Account Customization Projects)*

- In the NetSuite UI, **Copy to Account** can move a single customization and its dependencies to a target account

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Benefits of SDF

SuiteCloud Development Framework

- Team Development
- Richer Code Completion
- Version Control
- Change Management
- Dependency Management
- Account Validation

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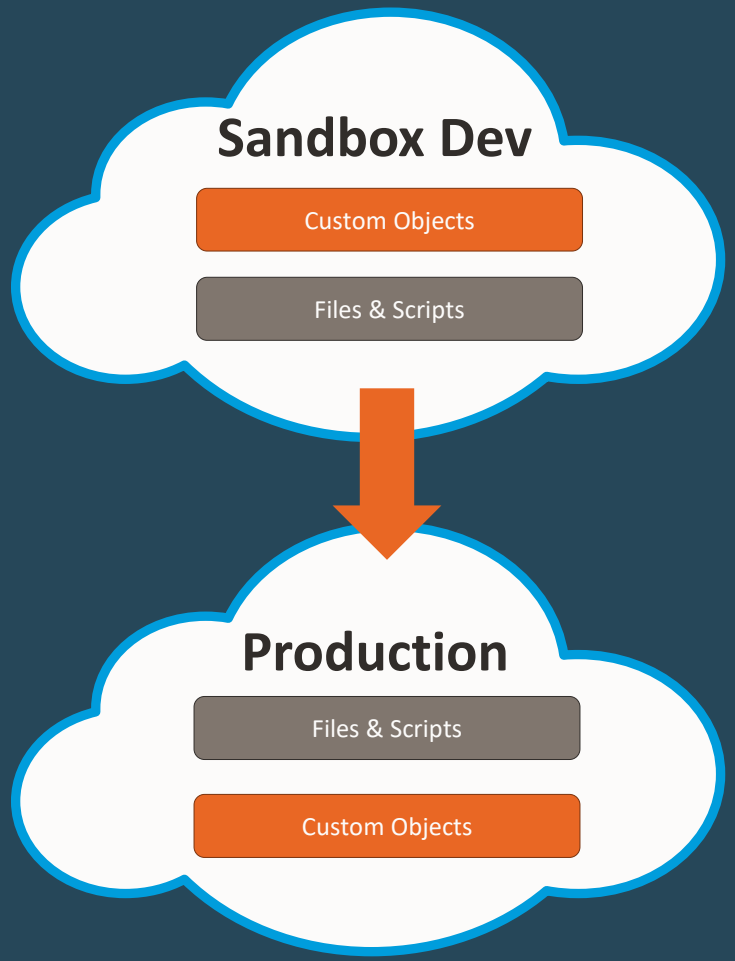
SuiteBundler Model



Custom objects include:

- saved searches
- roles
- custom record types
- and more

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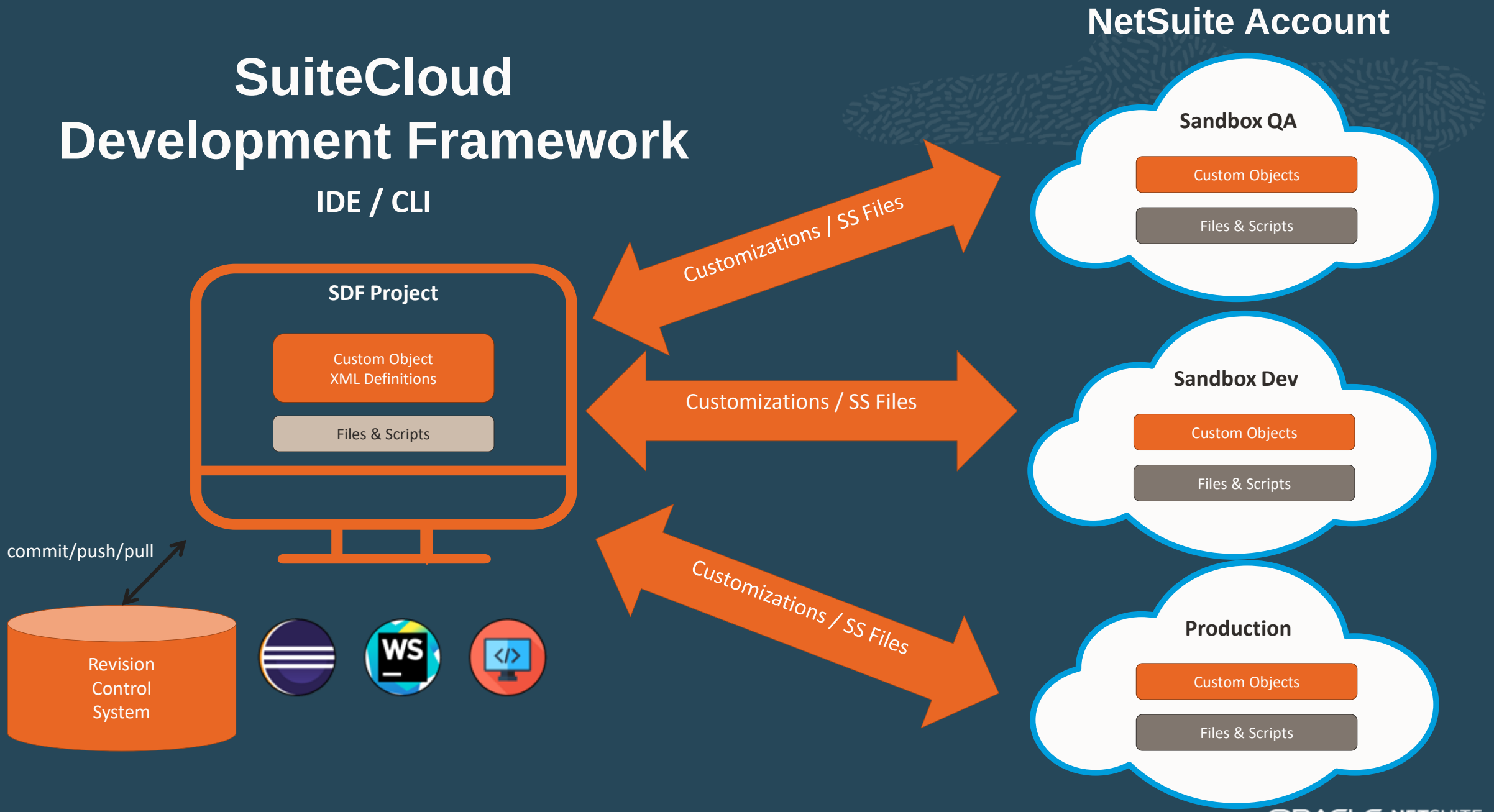
SuiteCloud Development Framework

IDE / CLI



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SDF Setup At-a-Glance

1. **Install IDE** Installing and Setting Up SuiteCloud IDE Plug-in for WebStorm

2. **Create or open an SDF project.** Creating an Account Customization Project in SuiteCloud IDE Plug-in for WebStorm

3. **Connect to your accounts and roles.** Adding an Account in SuiteCloud IDE Plug-in for WebStorm.

4. **Choose your Custom Objects and Import** Importing Account Components to your SDF Project with SuiteCloud IDE Plug-in for WebStorm

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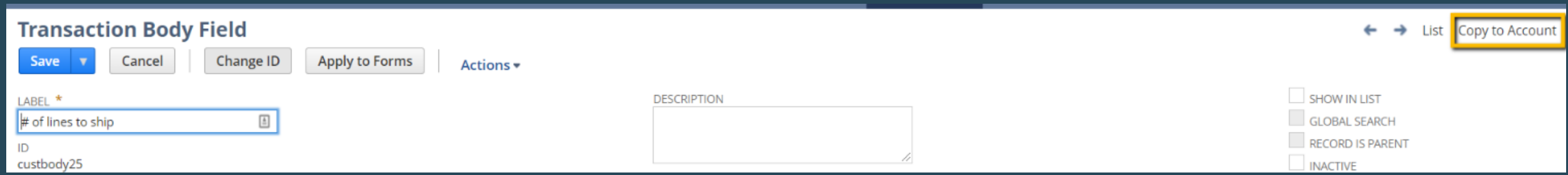
Copy to Account Feature

- Copy to Account is an administrator tool that copies a custom object between your accounts.
- Use Copy to Account to select a target account, choose dependencies, select record instances to include, then preview and deploy your custom record.
- Supported by SDF
- **Examples**: Saved Searches, Custom Fields, Reports
- Use the “Copy to Account” link found in “Edit” mode
- SuiteAnswers Copy to Account Overview



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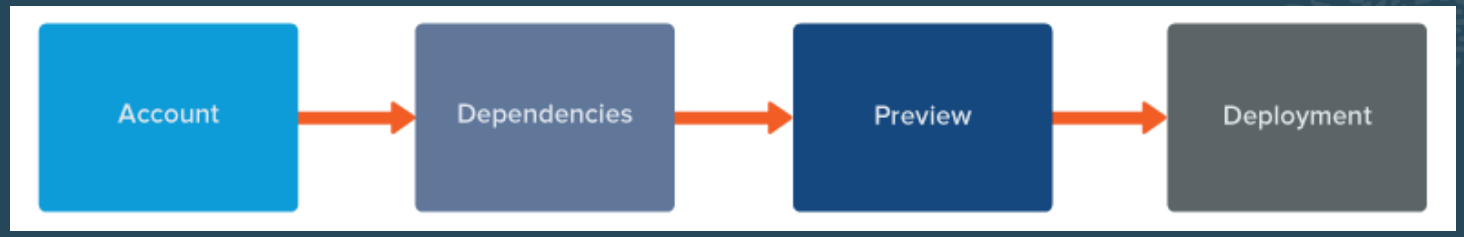
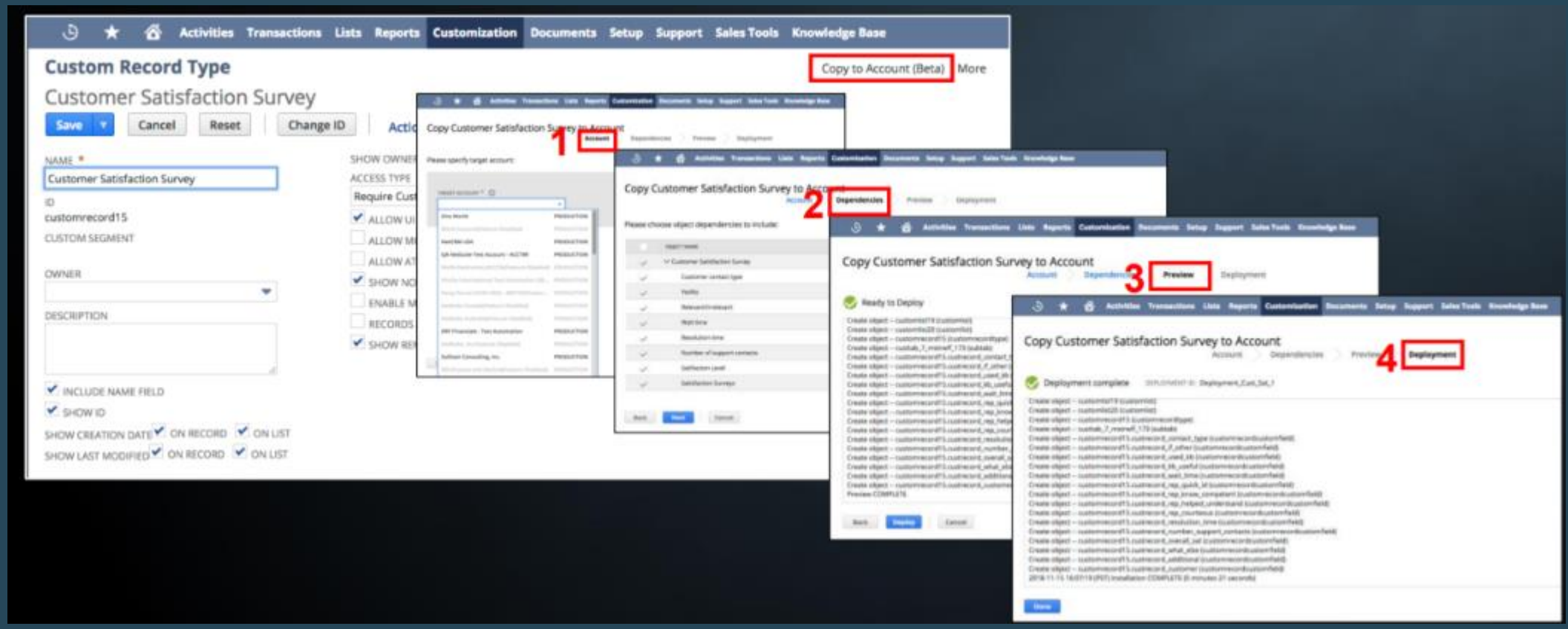
Copy to Account Screens





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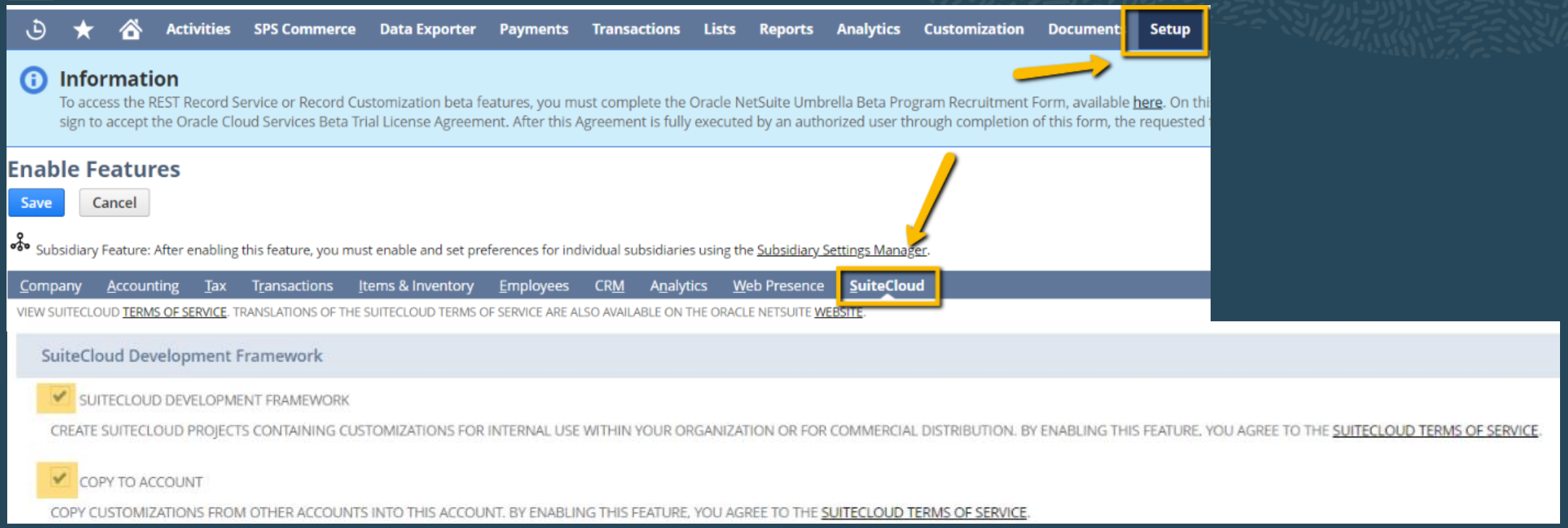
ORACLE NETSUITE

Enabling the Features



- Be sure to activate the features in BOTH Sandbox and Prod
- Some complex customizations may not be supported with “Copy To Account” feature
- “Copy To Account” link (shown) will appear in any record or customization that can be copied

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Links to Additional Information

Evan Goldberg Opening Keynote, features Shark Tank's Kevin O'Leary and organizations like Lovesac, Make-A-Wish and Modsy. Replay link: https://www.netsuitesuiteworld.com/keynote-schedule.html?source=

Gary Wiessinger's Product Keynote to learn more on future product features around financials, supply planning, analytics, commerce and HCM. Replay Link: https://www.netsuitesuiteworld.com/keynote-schedule.html?source=

NetSuite Analytics Warehouse Helps Organizations Unlock New Opportunities

NetSuite Analytics Warehouse. **Learn More:** Press Release, Blog, Web Page

NetSuite Expands Support Services to Help Customers Accelerate Growth

Oracle NetSuite has expanded its Advanced Customer Support service to provide prescriptive playbooks that help customers address operational challenges such as revenue recognition, project profitability, and supply chain management, and cross-functional processes like quote to cash. **Learn More:** Press Release, Blog

NetSuite Announces SuiteBanking, the First Cloud ERP to Integrate Fintech into a Unified Suite

Learn More: Press Release, Blog

Future Meeting Information

When: February 17, 2022

11:30 am – 1:00pm

Where:

MerchantE

Meeting format:

- Introductions
- General business / announcements
- Sponsor Presentation / discussion
- Lunch / Networking
- Open Forum – get feedback from other users and experts on any topic

[Poll]

MerchantE Webinar

Topic: **Are You Asking the Right Questions?**

How Digital Payment Acceptance in NetSuite Can Cut Costs and Fuel Growth

When: Thursday, December 2

11:30 am ET

Zoom Registration:

https://merchante.zoom.us/webinar/register/7616370154852/WN_vX2iq_1UQCqRvbqOjy49-g

More Info: Cathryn Matarazzo cmatarazzo@merchante.com

ATLANTA NETSUITE USERGROUP & MERCHANTE℠

Present

Open Q&A