Rocky Mountain NetSuite User Group Meeting
May 15th, 2019

8:00 – 8:30	**Breakfast & Networking**
8:30 – 9:10	**Welcome**
	General Business /
	SuiteWorld Update
9:10 – 9:20	**Nolan Business Solutions – Meeting Sponsor**
9:20 – 10:20	**Case Management / Customer Support**
	Presented by Margie Komninos – Plantscan
10:20 – 10:30	**Break**
10:30 – 11:00	**Sales Force Automation**
	Presented by Dana Larson – Eide Bailly
11:15 – 12:30	**Open Forum**

Nolan Business Solutions

Breakfast sponsor

RMNSug — Rocky Mountain NetSuite User Group

SA SystemsAccountants

Membership

- Membership count – now over 830 members!
- Membership is free – register at **www.RMNSUG.org**
- Notification of upcoming meetings and events
- Ability to attend meetings remotely
- Access member-only page on our web site:
  - Access past presentations and meeting notes
  - Access recorded presentations
  - Access past Tips & Tricks
- LinkedIn forum access
- $400 discount to SuiteWorld
- Free breakfast and coffee at meetings!

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Membership

- **RMNSUG User Group Forum (over 370 members)**
  - LinkedIn Group – Rocky Mountain NetSuite User Group Forum – click on Icon on our home page
  - Purpose:
    - ✓ Support fellow members with Q&A
    - ✓ Follow-up Q&A from meetings
    - ✓ Announcements –presentations, notes, discounts to SuiteWorld, …
    - ✓ Post job openings

- **Announcements and Reminders**
  - Evaluations will be emailed to you to complete same day as meeting
    - Walk in attendees - please make sure you register/RSVP today – iPad in the entryway
  - Register for events using the same email as your membership record so you don't end up with two memberships

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RMNSUG Board of Directors

- **Cory Anderson, AvidMax – President**

- **Margie Komninos, Plantscan - Sponsorship/Membership Chair**

- **Dana Larson, Eide Bailly – Speaker Chair**

- **Mike Kachline, Vertafore – Communication Chair**

- **Moriah Thoms, Spatial Corp. - Treasurer**

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A Special Thank You

Jamie Perry
Allegion

Jamie Perry
Allegion

Joined in 3/4/2009!

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First Time Meeting?

Member Announcements

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RSVP for Meetings

Please RSVP early if you are planning on coming to the meeting. We use the RSVP's to determine how much to order for breakfast.

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Announcements

Tips & Tricks of your own?

Submit a Tip or Trick through the contact us form at RMNSUG.org

Let us know if *you* would be interested in presenting it at a future meeting

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Meeting Sponsorship

Membership to RMNSUG is free. Cost of meetings is supported by 2 levels of sponsorship: SuiteApp and Breakfast sponsors. SuiteApp sponsors must be available through Suiteapp.com. Breakfast sponsors must offer NetSuite consulting services and have certified NetSuite consultants on staff.

- **SuiteApp Sponsor opportunities**
  - 1 Meeting Available for 2020
- **Breakfast Sponsors opportunities**
  - 4 Meetings Available for 2020

Sign up for either sponsorship type here:

www.rmnsug.org/Sponsorship

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Upcoming 2018 Meetings

July 2019	**Accounting Spotlight**
September 2019	**Inventory Management and 2019.2 Update**
November 2019	**Module Overview**
January 2020	**SuiteAnalytics**
March 2020	**2020.1 Update and TBA**
May 2020	**Workflow and SuiteWorld Update**

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My General Thoughts

- Not as "salesy" as 4 years ago
- Too many sessions to attend and not enough time
- I wish some sessions would dive deeper into the topics (like SQL class)
- Shaquille O'Neal is very funny and smart (but he is not a good DJ)
- If you go next year, RSVP your sessions and reserve your SuiteGuru time slots the day that they open up – they fill up very quickly
- Fantastic networking. I really enjoyed talking to people during meal breaks and learning about where they are with NetSuite, and how they use it for their businesses.
- The Expo hall was great. Lots of great NetSuite partners and SuiteApps to explore.

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SuiteAnalytics

- Ready for Prime Time!
- Multiple sessions throughout the conference
- Bugs from 2018.2 have been fixed in 2019.1
- It's time to start learning it – our January 2020 meeting will cover it in detail
- New analytics portlet on homepage to show graphs
- Instant formula validation
- New in formulas → it has a very good description and examples for formula expressions
- Also, there are new expressions available only to SuiteAnalytics
- Does not seem like it is even close to replacing reports or saved searches – instead it's works in tandem

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SuiteQL and SuiteAnalytics API
From Mike Kachline

Netsuite is currently developing a SQL-like language called "SuiteQL". The prototype we saw, allowed one to create a SuiteAnalytics workbook, "export" that to SuiteQL, then run that SuiteQL using N/query in a script. SuiteQL would be SQL 92 compliant, offer the syntax and flexibility we would expect for SQL (including sub-selects.) In essence, SuiteQL will allow us to create very advanced reports which the "SuiteAnalytics Workbooks" GUI would not be able to produce. Was nice to see that Netsuite was also focused on ensuring that "SuiteQL", SuiteScript and "SuiteAnalytics Workbooks" were interchangeable, all using SuiteQL as the backbone. A new ODBC connector will also be available which allows us to make these SuiteQL calls via an ODBC connection.

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A focus on CRM
From Mike Kachline

One keynote specifically walked through the CRM process; a process typically dominated by Salesforce and, today, is comparatively basic in NetSuite. That being said, my takeaway was that NetSuite is going to be aggressively pursuing this area of the business flow. The "key differentiator" here will be NetSuite's immediate access to per-customer financials data coupled with AI. In short, if the CRM user experience I saw on the big screen becomes a reality, and NetSuite CRM prices remain lower than Salesforce CRM, I could see NetSuite being competitive in this space.

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"Administrator" and Permissions
From Mike Kachline

Woven through a few talks, was the theme that NetSuite is clearly working to move users away from using the "Administrator" role as a day-to-day login role. The goal, as I could best infer, was the ability to create "fine tuned" admin roles. Example was having administrators who do *not* have access to view payroll data (for shops who do Payroll+HR in Netsuite.) Another example was Admins who could ONLY make structural changes via an SDF deployment.

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SuiteTax

- Will help streamline the sales tax setup process via setup wizard
- A built-in sales tax calculation engine
- All new NetSuite accounts starting in 2020 will have the new tax system
- Companies can ask for early access
- Will be able to use alternate tax calculation engines such as Avalara and TaxJar
- Can set up non-taxable items by specific states
- Manages exemption certificates by customer

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Brainyard
www.netsuite.com/brainyard

- Benchmarking by industry
  - Using data from NetSuite customers
  - KPIs by industry
- Research
  - Surveys
  - State of industry reports
- Performance analysis
  - Practical advice and guidance

- Also check out www.growwire.com
  - Videos, articles, and podcasts about Entrepreneurship and Business Innovation

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Misc things discussed. . .

- Billing Operations
  - Can set up to automatically bill Sales Orders or Invoices
  - Not really new, but I built a workflow to do this a long time ago and didn't know this existed natively
- Upgrades will be able to be set within a window of time based on the admins needs – coming soon – not sure when yet
- Sandbox refreshes are now faster ~ 1 day
- Record Profiler (future upgrade)
  - Part of App Performance Monitor (APM)
  - Helps to assess performance bottlenecks
- Workflows – Instances and History Records tool
  - In a workflow, see More . . . In upper right hand corner
  - This shows the active and finished workflow instances
  - Can also set a number of months to keep the history

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