



RMNSUG Meeting Minutes 7/20/2016 Bundles of Joy

Expensify - T. J. Ferris

- Real time expense reporting
- Automatically capture receipt & expense information
- Automate approvals and reporting
- Expense reports are exported into netsuite as expense reports, Jes, Vendor bills.
- Automatic mileage or distance tracking
- Overpaying for expense management solutions
- Quickly reimburse field sales, remote workers etc.
- Easy configuration to connect to NetSuite
- No heavy professional services to implement

Feature Presentation – Bundles of Joy

- Bundle Overview
 - See presentations for the main presentation
 - Caution - first install your bundles in sandbox or development accounts
 - Test and ensure that it is not malicious
 - NetSuite platform solutions group bundles are usually safe but are documented in netsuite
 - If you are unsure, ask your netsuite account rep to validate
 - To install
 - Customization>search & install bundles>
 - Public bundles can be installed
 - 3rd parties may still require that you have an account to configure the features
 - Bundle overview
- Sticky Notes
 - Share relevant / urgent and important reminders on records across your workforce
 - Manage notes on a board,
 - When you open records (that have been saved)
 - Priorities can be specified. (green, yellow, red)
 - Snap notes to fields to describe what it is for to users looking at the page.

- Sticky Notes Board
 - Personal preferences in sticky notes
- Records Timeline
 - Visual representation of the records in netsuite and what actions they have been through
 - Ex. Opportunity>sales order>fulfillment>returns
 - Visible on the bottom of a record.
 - Numbers indicate groups of records (sales order and invoice) for example
 - You can customize the saved search that displays the records in the timeline to display fields that are more important to you.
 - Options
 - Dock the timeline in different places
 - Top dock
 - Related records can be associated
- SuiteSocial
 - Facebook for NetSuite
 - Subscribe to employees
 - Post on records
 - Share
- File Drag and Drop
 - When in edit mode on a record, you can drag files from your desktop to a record
 - During setup, you can configure which folders should be used for each record.
 - A simple setup wizard is available to configure this for each record type.
- Custom administrator role
 - This bundle contains a netsuite custom role that has most of the permissions that a standard netsuite administrator has. It helps when you want someone to have mostly admin permissions but you don't have to re-create the role from scratch. Y
 - Use the custom admin role as a template to create your own custom role.
- Electronic Payments
- Performance monitoring
 - This bundle allows you to view average page load times and what scripts / workflows might be slowing your system down
 - Valuable if you have a highly customized environment
 - Error counts
 - Bundle analysis
- Navigation Portlet
 - Creates dashboard portlets to navigate the system without using.
- SuiteSolutions being moved to public bundles for customers
 - Netsuite uses some of these for demo accounts and some of them.
- Last sales activity
 - This bundle is often installed by netsuite when you gain access to your new account
 - Adds on to the CRM module to track contacts / customers that were recently contacted
 - View most recent sales activity for each customer on their record

- Bundled saved searches included
- Subsidiary Navigator
 - Lets users click the subsidiary on their dashboard to filter all the information in their netsuite account
- Nerdly multi-company automation NMCA (Dana's friend's bundle)
 - Pay bill in one subsidiary and then allocate it to other subsidiaries
 - Generates intercompany journal entries.
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- Netsuite approval bundle
 - 3 way match between PO, Vendor bill, and payments
 - Installs basic approval workflows that you can use as templates or starting points
 - JE, PO, VB included