NetSuite Implementation, Consulting, and Support

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NETSUITE
PARTNER OF THE YEAR
2021
NORTH AMERICA SOLUTION PROVIDER
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SUITEWORLD 2021 HIGHLIGHTS

SUITEBANKING

- AR Automation

  - Payment Link – pay with credit card or ACH

    - Also supports 3rd party payments such as Paypal

    - Automate creation and scheduling of invoices

    - Send payment reminders automatically

- AP Automation

  - Automated invoice scanning

  - GL code assignment

  - Three-way invoice matching

  - Automated outbound payments

SUITEBANKING

- Expense Management

  - SuiteBanking virtual payment card

    - Expenses are captured and submitted automatically into NetSuite

- Spend Management

  - Budget validation capabilities

  - Compare open purchase request to budget

- Global Wallet

  - Make and accept payments from a single HSBC global account

  - Reduces need for multiple international accounts

- Automated Bank Reconciliation

NETSUITE ANALYTICS WAREHOUSE

- NetSuite's data warehouse, NetSuite Analytics Warehouse, is a prebuilt, cloud-based data warehouse and analytics solution that consolidates multiple sources of data, including NetSuite data, CSV files and other business system data, to drive actionable insights using the Oracle Analytics Cloud and powered by the Oracle Autonomous Data Warehouse. Business users can easily build and run their own analyses without relying on IT.
  - https://www.netsuite.com/portal/products/analytics/data-warehouse.shtml
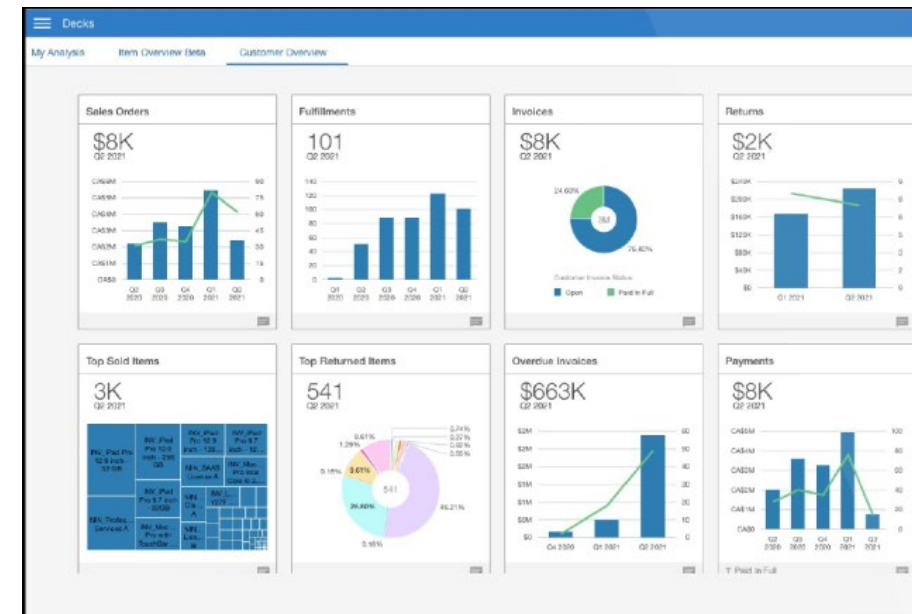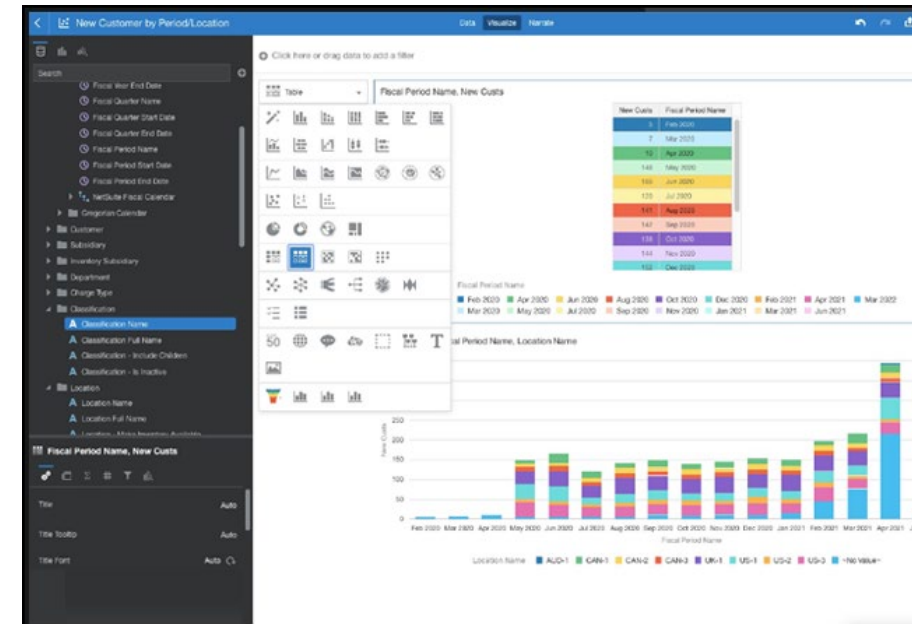
MY ACCOUNT

- The same customer account functionality in SuiteCommerce and SCA

- Available as an add-on for non-SC/SCA use

- View orders, invoices, status'

- Pay quickly and easily in one place

NETSUITE CONNECTOR

NETSUITE CONNECTOR

Comparing NetSuite Connectors

Feature	Starter Ecommerce	Standard Ecommerce	Premium Ecommerce	Premium Plus Ecommerce	Premium POS	Premium Logistics	Premium Plus Logistics
Named Users	3	5	Unlimited				
Available Connectors	Amazon, Shopify, Magento, BigCommerce, WooCommerce, eBay, Walmart				Shopify POS	ShipStation	Amazon MCF
Order Sync	●	●	●	●	●		
Coupon Sync	●	●	●	●	●		
Gift Certificate Sync	Shopify, Magento, BigCommerce, WooCommerce				●		
Fulfillment Sync	●	●	●	●	●		
Price & Quantity Sync	●	●	●	●	●		
Full Product Sync		●	●	●	●		
Real-time Price & Quantity Sync			●	●	●		
Real-time Order Sync			Shopify, BigCommerce, WooCommerce		●		
Refund Sync				●	●		
Settlement Sync			Amazon				
3PL Order Sync						●	●
3PL Fulfillment Sync						●	●

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NETSUITE CONNECTOR

NetSuite Connector Pricing

Connector	Level	Annually
NetSuite Starter Ecommerce Connector	Starter	$999
NetSuite Standard Ecommerce Connector	Standard	$2,399
NetSuite Premium Ecommerce Connector	Premium	$2,999
NetSuite Premium Plus Ecommerce Connector	Premium Plus	$3,999
NetSuite Premium POS Connector	Premium	$2,999
NetSuite POS Connector – Additional Location	Premium or Premium Plus	$299
NetSuite Premium Logistics Connector	Premium	$999
NetSuite Premium Plus Logistics Connector	Premium Plus	$1,499
NetSuite Connector Add-on	Starter or Standard	$599
NetSuite Premium Connector Add-on	Premium or Premium Plus	$999

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NETSUITE CONNECTOR

Connector Add-ons

NetSuite Saved Search Export

- Saved Searches are exported from NetSuite into an FTP destination of your choice

Amazon Seller Fulfilled Prime

- Automate the process of buying shipping labels from Amazon and bringing them into NetSuite

Amazon FBA to NetSuite Inventory Adjustment

- Post an alert when there are inventory discrepancies between NetSuite and Amazon FBA

Amazon FBA Inbound Shipping

- When a transfer order is created in NetSuite, push FBA shipment plan into Amazon; when Amazon receives these items, the transfer order is updated in NetSuite

Amazon Multi-channel Fulfillment Inventory Sync

- Inventory information is exported from Amazon MCF into NetSuite

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SMART COUNT

- Replacing cycle counts

- A new automated cycle counting solution, automatically triggers cycle counts based on events, stock levels, sales velocity thresholds, or on a schedule, and tally scans without impacting operations in the location.

PROJECT MANAGEMENT

- New invoice presentation templates help customers configure project invoices in the preferred format of the client with the level of detail that will enable timely payment of bills and improve cash flow. In addition, enhancements to project purchasing allow purchase orders to be created from the project record and for purchase orders, vendor billing and payments related to a project to be easily tracked.

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360 DASHBOARDS

- Customer 360 Dashboard

  - Lifetime Value

  - Top Customers

  - Customer specific metrics

- Cash 360 Dashboard

- Project 360 Dashboard

NETSUITE 2021.2 HIGHLIGHTS

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CPAs & BUSINESS ADVISORS

PREFERENCE TO ALLOW NON-POSTING CHANGES IN CLOSED PERIODS BY DEFAULT

NetSuite now includes a preference called Allow Non-GL Changes Is Set by Default to allow non-posting changes in closed periods by default. When set, NetSuite checks the Allow Non-G/L Changes box for each new accounting period you create. Accounting periods created before setting this preference remain unchanged.

In this release, you can also check or clear the Allow Non-G/L Changes box on all accounting periods, including unlocked periods.

To set this preference, go to Setup > Accounting > Preferences > Accounting Preferences > General

SUPPORT FOR NEW CUSTOMER-SCHEDULED MAINTENANCE

You can now reschedule an increasing number of maintenance activities using the Customer-Scheduled Maintenance page, including certain routine maintenance and the Account Move to OCI (Oracle Cloud Infrastructure.)

SUITEAPPROVALS ENHANCEMENTS

Addition of Project Manager as an Approver Type – When creating an approval rule with a custom approval chain, you can select Project Manager from the Approver Type dropdown list.

Supported Record Types for Project-Based Approvals – Project managers can approve purchase orders, expense reports, and vendor bills that are linked to projects.

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AUTOMATED CASH APPLICATION

- You might import bank lines that do not have matching customer payments in NetSuite. The Automated Cash Application feature enables you to automatically generate a batch of customer payments in NetSuite and apply them to open invoices. The generated customer payments are then automatically matched and cleared in the system.

NEW SANDBOX REFRESH OPTIONS

Each sandbox account now has the option to be refreshed from either your production account or another sandbox account.

MATCH BANK DATA ENHANCEMENTS

Bulk Matching

The Match Bank Data page now includes a Select All box. This box lets you check or clear all the boxes for all items visible in the current page of the Account Transactions grid.

The bottom section in which selected items from the grids appear, and the popup windows for viewing matched or cleared transactions, are now paginated. Consequently, you can find transactions with limited scrolling.

- **Orders Reservations**

- **Sales Channel**

Still not supported:
Cash Refunds
Item Receipts
Item Fulfillments (sort of)

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CHANGING ITEM ASSET AND COGS ACCOUNTS

Due to account structure changes or errors in setting up inventory asset and cost of goods sold (COGs) accounts, cost accountants may need to modify these accounts for an item record. NetSuite now enables you to make these changes without affecting the item's historical transactions and existing reports.
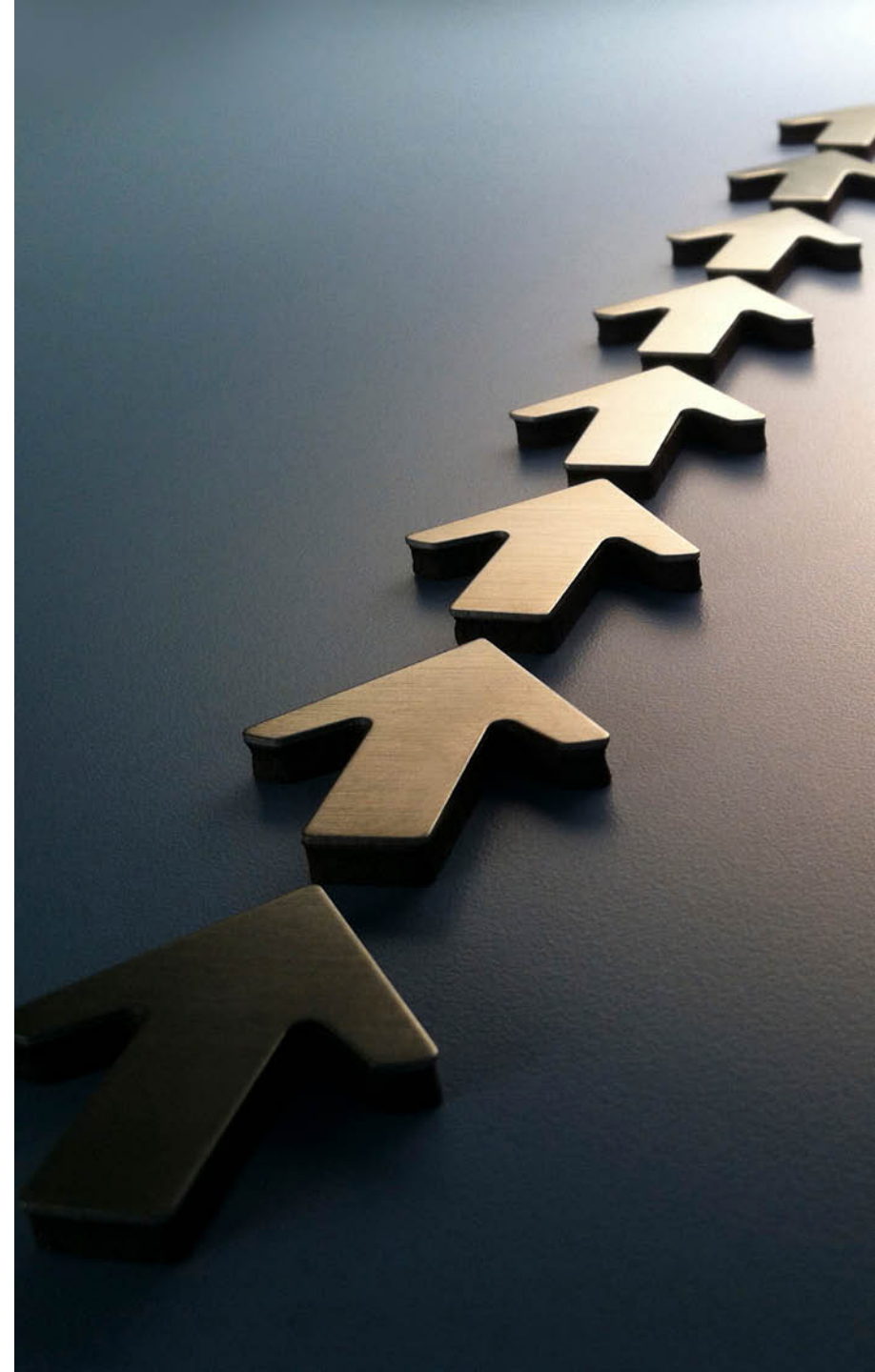
PURCHASE TO PROJECT NOW AVAILABLE

Purchase to Project version 1.00.0 is now available for installation from the SuiteApp Marketplace as a public and managed SuiteApp. This SuiteApp lets project managers create and manage purchase transactions related to projects and project tasks. It provides a unified project purchasing experience with insight into project purchases and single-click creation of purchase orders from the project or project task.

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SUITEANALYTICS WORKBOOKS

DATASET LINKING

Link datasets to analyze metrics from two datasets in a single visualization, based on a link that you define using common field data from each dataset. Unlike joining record types, you can link datasets even if they are based on record types that do not have predefined common keys in the analytics data source.

CACHED DATA IN DATASETS

In previous releases, data in datasets was loaded in real time whenever you accessed a dataset. With the Cached Data in Datasets feature enabled in your account, you can use Cached Response mode to load cached data in your datasets. The load time of your datasets and any workbooks or portlets that use the dataset is improved when data is loaded from cached data.

CSV EXPORT PIVOT TABLES

In workbooks, you can now export your pivot tables as CSV files. Prior to 2021.2, you could only export table views and charts as CSV files. Now, the export option is available in all workbook visualizations: table views, charts, and pivot tables.

INBOUND ASN AUTOMATION

- The Inbound Advance Ship Notice (ASN) Automation SuiteApp automatically creates inbound shipment records from advance ship notices received from the vendor.

This SuiteApp enables you to:

- Create and manage ASNs.
- Import ASNs through CSV and Web Services.
- Define tolerance limits for receiving item overages at the item, vendor, and company levels.
- Set preferences to create purchase order or edit existing purchase order to receive item overages.
- Approve or reject ASNs with item overages.

THANK YOU!

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