



NetSuite Implementation, Consulting, and Support



NETSUITE 2019.2 UPDATE HIGHLIGHTS

ENHANCEMENTS TO DASHBOARDS

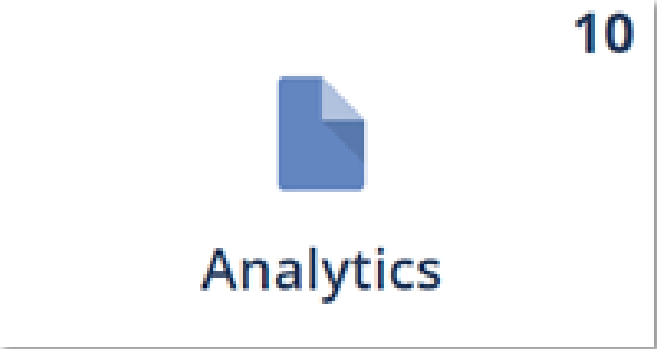
Analytics Portlet Now Supports Workbook Pivot Tables

Sales by Location & Sales Rep (Quarter)

		Date (Quarter)			
		Q1	Q2	Q3	Q4
Location — +	Sales Rep	Total Amount (Transacti...	Total Amount (Transacti...	Total Amount (Transacti...	Total Amount (Transacti...
▼ New Jersey	Theodore Hosch	\$3,447,915.21	\$211,153.79	\$184,710.00	\$184,710.00
	Jon Baker	\$2,232,170.42	\$41,855.85	\$877,851.06	\$1,746,732.96
▼ London	Luke Duke	\$6,949.44	\$1,007,700.00		
	Poncho Poncherelli	\$37,564.29	\$22,297.52	\$804.00	\$4,561.19
	Mathew Christner	\$136,712.84	\$996.45		
▼ Vancouver	Jessie Barto	\$36,743.20	\$816.80		

ENHANCEMENTS TO DASHBOARDS

Increased Number of Analytics Portlets



ENHANCEMENTS TO DASHBOARDS

Increased number of KPI headlines – now 8

Key Performance Indicators



INDICATOR	PERIOD	CURRENT	PREVIOUS	CHANGE
Total Bank Balance	This Period vs. Last Period	\$276,567	\$254,209	↑ 8.8%
Cart Abandonment	This Month vs. Last Month	0.00%	0.00%	0.0%
Open Cases	Same Day Last Month vs. Today	1	4	↓ 75.0%
Authorized Commission	This Month	\$0		
Income	This Period vs. Last Period	\$20,750	\$13,002	↑ 59.6%
Sales (Cash Basis)	Week Before Last vs. Last Week	\$6,129	\$14,621	↓ 58.1%
Sales (Orders)	This Month vs. Same Month Last FQtr to Date	\$20,750	\$4,948	↑ 319.4%
Opportunities Won	Same Month Last FQtr to Date vs. This Month	0	3	↓ 100.0%
Opportunities Lost	Same Month Last FQtr to Date vs. This Month	0	1	↓ 100.0%
New Customers	Previous One Year vs. Fiscal Year Before Last	7	0	↑ N/A
Open Opportunities	Last Month to Date vs. This Month	9	7	↑ 28.6%
New Customers (Sales Orders)	This Month vs. Same Month Last FQtr to Date	0	0	0.0%
Sales (Billings)	Same Day Last Month vs. Same Day Week Before Last	\$0	\$0	0.0%


















ENHANCEMENTS TO DASHBOARDS

Full Screen View

Sales Orders to Fulfill

5/19/2016 — 3/3/2017 TOTAL: 1813

Maximize

Edit View	Date ▲	Ship Date	Document Number	Name	Amount
 	5/19/2016		110	Anderson Boughton Inc.	76.80
 	5/19/2016		111	Bay Media Research	366.54
 	5/22/2016		108	Jackson Alexander	1,712.90
 	5/23/2016		109	Steve Davis	3,020.38
 	12/3/2016		112	B-Sharp Music	2,345.27
 	1/21/2017		113	B-Sharp Music	15,447.58
 	1/21/2017		114	Jackson Alexander	2,799.65
 	2/10/2017	2/12/2017	5503	Alex Wynne	119.52
 	3/3/2017	3/5/2017	181	Williams Electronics and Communications	2,164.86
 	3/3/2017	3/5/2017	182	Franklin Photography	9,988.11

ENHANCEMENTS TO DASHBOARDS

Full Screen View

Employees - NetSuite (RM) x Home - NetSuite (RMNSUG) x Sent Email - NetSuite (Rock) x NetSuite 2019.2 Release No x SuiteAnalytics x User Interface x Food and Beverage SuiteAp x NetSuite - Customer Login x

tstdrv1906809.app.netsuite.com/app/center/card.nl?sc=-29&whence=

Sales Orders to Fulfill

5/19/2016 — 5/9/2017 TOTAL: 1813

Edit View	Date ▲	Ship Date	Document Number	Name	Amount
	5/19/2016		110	Anderson Boughton Inc.	76.80
	5/19/2016		111	Bay Media Research	366.54
	5/22/2016		108	Jackson Alexander	1,712.90
	5/23/2016		109	Steve Davis	3,020.38
	12/3/2016		112	B-Sharp Music	2,345.27
	1/21/2017		113	B-Sharp Music	15,447.58
	1/21/2017		114	Jackson Alexander	2,799.65
	2/10/2017	2/12/2017	5503	Alex Wynne	119.52
	3/3/2017	3/5/2017	181	Williams Electronics and Communications	2,164.86
	3/3/2017	3/5/2017	182	Franklin Photography	9,988.11
	3/9/2017	3/11/2017	18744	Susan Adams	199.60
	3/15/2017	3/17/2017	11-0001	Fabre Enterprises	2,999.99
	3/15/2017	3/17/2017	11-0002	Smith Supplies	10,799.96
	3/15/2017	3/17/2017	11-0003	Smith Supplies : Smith East Coast Office	5,999.98
	3/24/2017	3/26/2017	1033	RACE Enterprises Pty Ltd	1,587.01
	3/31/2017	3/31/2017	1037	Donovan Williams	1,702.17
	3/31/2017	4/1/2017	11-0005	Fabre Enterprises	2,999.99
	3/31/2017	4/1/2017	11-0006	Smith Supplies	10,799.96
	3/31/2017	4/1/2017	11-0007	Smith Supplies : Smith East Coast Office	8,999.97
	3/31/2017	4/1/2017	11-0073	Fabre Enterprises	1,996.00
	3/31/2017	4/1/2017	11-0074	Smith Supplies	1,796.40
	3/31/2017	4/1/2017	11-0075	Smith Supplies : Smith East Coast Office	1,996.00
	3/31/2017	4/1/2017	11-0076	Smith Supplies : Smith West Coast Office	2,001.99
	3/31/2017	4/1/2017		Smith Supplies : Smith East Coast Office	1,996.00

BANK FILE IMPORT UPGRADES

- **Advanced Banking Data Import**
 - Import in more file formats from more financial institutions
 - Automate the file upload process through an sFTP connection
 - Create format profiles for your financial institutions, which contain custom file formats along with mappings and configurations required for import
 - To improve the import process, this feature includes the following enhancements:
 - New Import Method
 - Direct Bank Connectivity
 - Asynchronous Importing
 - More Informative Import Status and Results
 - New Financial Institution Records
 - Ability to Exclude Bank Transaction Codes
- **Bank Statement Parsers SuiteApp (Bundle ID: 293699)**
- **Bank Connectivity SuiteApp (Bundle ID: 285204)**

BANK FILE IMPORT UPGRADES

- Advanced Banking Data Import

Statement File Import

[Manual Import](#) [Connectivity Plug-in](#)

File Selection


[Choose a file](#) Or drop files here

Import Options


Select a Financial Institution and connect your data to your mapped accounts and codes if Financial Institutions are set up. Otherwise, import with a default parser.

- Select a Financial Institution
 Import with a default parser (CSV, OFX, QFX, BAI2, or CAMT.053)

FINANCIAL INSTITUTION *

+ 

FORMAT PROFILE *

+ 

[Import](#)

ADVANCED BANKING DATA IMPORT

- Bank Statement Parsers SuiteApp (Bundle ID: 293699)
 - The Bank Statement Parsers SuiteApp delivers standard parser plug-ins that can read bank statement files and import the data to aid with bank reconciliation in NetSuite. The SuiteApp also comes with sample scripts that you can download and use as a reference when you create custom parsers.
 - Parsing: Analyze the structure of a bank file and create a saved mapping of the fields in the file.
 - Includes parser plug-ins for BAI2, OFX/QFX, and MT940 (SWIFT)
 - Can create custom parsers for any file format

ADVANCED BANKING DATA IMPORT

- Bank Connectivity SuiteApp (Bundle ID: 285204)
 - The Bank Connectivity SuiteApp works together with the Bank Statement Parser Plug-ins to securely connect to your bank or 3rd party financial institutions. The SuiteApp connects to financial institutions using an sFTP Connectivity Plug-in, and then import bank statement files that match a specified filename pattern to NetSuite. You can use regular expressions and reserved words to define the filename pattern.

SUITEAPPROVALS VERSION 2019.2 - #203059

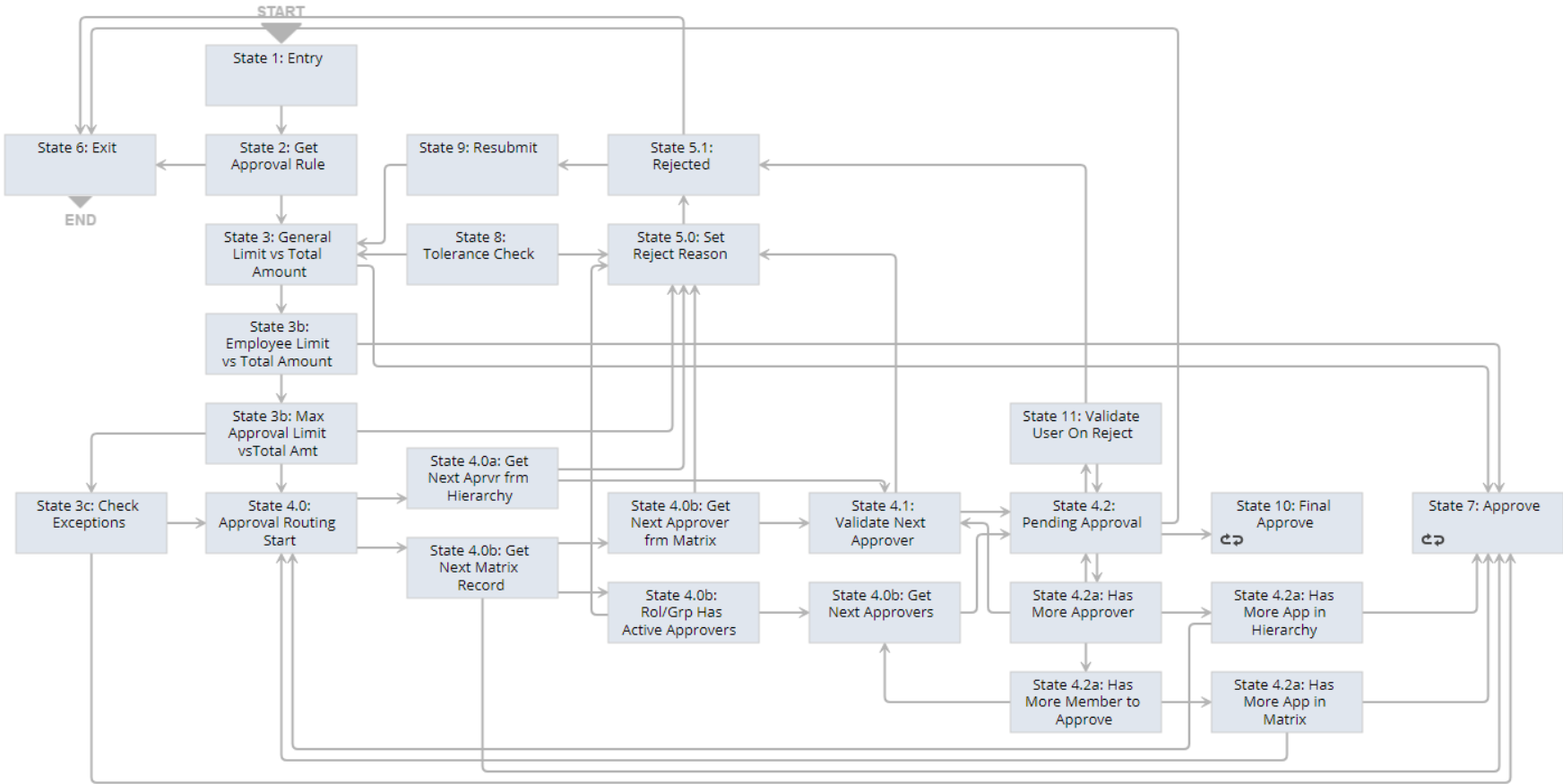
SuiteApprovals provides standard capabilities for managing approval of the following record types:

- Journal Entry
- Engineering Change Order
- Expense Report
- Purchase Order
- Requisition ***NEW***
- Sales Order
- Vendor Bill

SUITEAPPROVALS VERSION 2019.2 - #203059

Workflow: SuiteApprovals - Approval Workflow

Workspace



SUITEAPPROVALS VERSION 2019.2 - #203059

Approval Rule

[Edit](#) | [Back](#) [Make Copy](#)

Primary Information

NAME
Sales Order Approval

DESCRIPTION

RECORD NAME
Sales Order

STATUS
Not Running

INACTIVE

START DATE END DATE
7/25/2019 7/25/2019

SUBSIDIARY
██████████

SAVED SEARCH CONDITION

PRIORITY
1

Approval Routing

ROUTE APPROVALS BASED ON AMOUNT

AMOUNT FIELD MAPPING CURRENCY

RECORD AMOUNT LIMIT (REQUIRE APPROVAL FOR AMOUNTS OVER)

USE EMPLOYEE LIMIT (APPLY IF HIGHER THAN RECORD AMOUNT LIMIT)

APPROVAL ROUTING

- USE STANDARD EMPLOYEE HIERARCHY
- DEFINE CUSTOM APPROVAL CHAIN

REQUIRE APPROVAL BY (CUSTOM APPROVAL ROUTING)

- ALL LEVELS OF APPROVAL
- ONE LEVEL OF APPROVAL BASED ON APPROVER'S APPROVAL LIMIT

	APPROVER TYPE	APPROVER
1	Group (Any)	All Active Employees

SUITEAPPROVALS VERSION 2019.2 - #203059

- **Extension to Requisition Records** – You can now create approval rules for requisition records. You can define any approval rule for requisitions in two ways:
 - Using the total line amount of the record as basis and then selecting an approval routing type: employee hierarchy or custom approval matrix.
 - Specifying an approval chain (employee hierarchy or custom) regardless of the total amount on the record.

Automatic approvals using employee and record amount limits, approval delegation, the approve and finalize capability, and one-level approval based on approver's approval limit are supported for requisitions.

SUITEAPPROVALS VERSION 2019.2 - #203059

- **Support for Cross-Subsidiary Approvals for Users with Appropriate Subsidiary Permissions** – You can now set up subsidiary restriction values on the employee record of approvers through the roles assigned to them. This enhancement enables you to specify or add approvers from a subsidiary that is different from the subsidiary of an approval rule.

This change applies to all supported record types.

RETURN AUTHORIZATION FROM A CASE - #266623

The Return Authorization from Case SuiteApp lets you create a return authorization or a sales order directly from a support case for existing sales orders or customer invoices. You can search for transactions using the transaction type, document number, transaction date, or through a date range. On the transaction record, you can select the items and specify the quantity for return or replacement. Through the SuiteApp, you can ensure that the source transaction, the support case, and the generated return authorization or replacement sales order are all linked together.

NEW STANDARD SUITEANALYTICS WORKBOOKS

- Transaction Detail Workbook (Beta) ***NEW***
- Inventory SuiteAnalytics Workbook (Beta) ***NEW***
- Sales (Ordered) Workbook (Beta)
- Sales (Invoiced) Workbook (Beta)
- SuiteCommerce Top Searches (Beta) Workbook
- System Notes v2 (Beta) Workbook

TRANSACTION DETAILS WORKBOOK (BETA)

NetSuite 2019.2 includes a new Transaction Details beta workbook in SuiteAnalytics Workbook. This workbook provides the same information as the Transaction Details report but with the full capabilities of the SuiteAnalytics Workbook tool.

Transaction Detail Workbook (Beta) ⓘ

↶ ↷ ↻ | 📄 🔄 📌

Dataset +

The screenshot displays the NetSuite Transaction Detail Workbook (Beta) interface. On the left, there is a search bar labeled "Search for records and fields..." and a list of formulas. The "Transaction" formula is selected, showing a list of fields including Date, Transaction, Type, Abbrev. Type, Account Based Number, ACH/EFT Reference..., Action Item, Actual Invoice Date, Actual Shipping Date, and Additional Equiom. On the right, the "Criteria summary" section is visible, showing a list of criteria: "Date", "AND", "Transaction Accounting Line: Amount", "AND", and "Account: Type". Below this, a list of criteria is shown, including "Date on or after start of this month", "Transaction Accounting Line: Amount (not consolidated) is not empty", and "Account: Type none of <NO VALUE>, Non Posting". A dashed box indicates a drop zone for adding more criteria, and a "Reset Criteria" button is located at the bottom.

Search for records and fields... 🔍 ⏪

Formulas

- Transaction 3
- Approval Status (ST) Approval ...
- Billing Address Address
- Competitors Competitor
- Created By Entity
- Created By Employee
- Created By Customer
- Created By Vendor
- Created By Partner

Field	Type
Date	📅
Transaction	T
Type	T
Abbrev. Type	T
Account Based Number	T
ACH/EFT Reference...	✕ T
Action Item	T
Actual Invoice Date	✕ 📅
Actual Shipping Date	📅
Additional Equiom	✕ T

Criteria summary [Show details](#)

Date • AND • Transaction Accounting Line: Amount • AND • Account: Type

AND

- :: Date on or after start of this month
- :: Transaction Accounting Line: Amount (not consolidated) is not empty
- :: Account: Type none of <NO VALUE>, Non Posting

Drop fields here to add criteria.

Reset Criteria

EFFECTIVE DATE PRICING - #222420

- The Effective Date Pricing SuiteApp enables you to schedule specific price changes in advance. You can select a start date to indicate when you want the price changes to take effect, and an end date to indicate when the item should revert to its original price. You can also set a permanent change in item price. The change takes effect on the selected start date for the price update. A scheduled script runs in the background to automatically update the item prices on the scheduled period.
- Use cases:
 - Authorized Sale Periods from Vendors
 - Scheduled Annual Price Changes
- Effective Date Pricing does not work unless the following features are enabled:
 - Multiple Currencies
 - Quantity Pricing Level
 - Multiple Prices

VENDOR PREPAYMENTS

- Prior to NetSuite 2019.2, vendor deposits were tracked manually. Now, you can manage vendor deposits using the Vendor Prepayments feature. Vendor prepayment records track deposit amounts paid to vendors before they accept a purchase order for a good or service. Then, you apply these prepayment amounts against open bills for the vendor. This feature enables you to record and track multiple prepayments and prepayment applications for all vendors.
- To use, just enable the feature → Setup > Company > Setup Tasks > Enable Features > Accounting

ORDER GUIDES - #275880

- Order guides are predefined lists of items that customers can order from on a regular basis. Order guides enable you to add any or all of the predefined items in bulk to a sales order.
- Using the Order Guides SuiteApp, you can create an order guide per customer or a template that you can assign to multiple customers. You can create an order guide for a group of customers, such as pizza restaurants. Add the list of items, like flour and cheese, which they may order on a regular basis. For each customer, you can further customize the list by adding more items based on recent orders. On sales orders, you can use one or more order guides to add the items.
- Food and Beverage SuiteApps

NEW SENT EMAIL LIST DETAILED INFORMATION

- In previous releases, administrators could only view undelivered email through the Undelivered Email list and search capabilities. Administrators were not able to view information for all outgoing email sent from their accounts. With the new Sent Email List, administrators can view all email that results in errors, as well as all email successfully sent to the recipient. This ability is important for administrators auditing account activity.
- No changes needed. Automatically available in all accounts.

NEW SENT EMAIL LIST DETAILED INFORMATION

Sent Email

Email

SENT DATE 11/11/2019 3:02 pm

LOG DATE 11/11/2019 3:02 pm

FROM Mike Kachline

SUBJECT GTM information for upcoming RMNSUG meeting

TO RECIPIENTS csanderson@eidebailly.com

CC RECIPIENTS

BCC RECIPIENTS

MESSAGE-ID <dupsstislonq71al07v88l1nrud7f0axa5ppg6w92y7agh6g6p1kl82ccp53j9h5@na2.netsuite.com>

COMPLIANCE VERIFIED

BODY

Below is the GoToMeeting information for the remote login for the upcoming RMNSUG meeting. The meeting start time is 8:30am MST.

RMNSUG Meeting - This Wednesday 08:00 - 12:30 MDT

Please join my meeting from your computer, tablet or smartphone.
<https://global.gotomeeting.com/join/SSNSSNSSN>

You can also dial in using your phone.
United States: +1 (571) 317-3122

Access Code: 701-144-213

First GoToMeeting? Let's do a quick system check: <https://link.gotomeeting.com/system-check>

We look forward to seeing you online! We will be monitoring the chat room so if you have any problems kindly let us know via the chat window.

We will make every effort to accommodate those of you attending remotely, but if we run into network issues we may have to terminate the GTM, which also means that the meeting would not be recorded. Additi...

RECIPIENT	STATUS	FAILURE REASON
csanderson@eidebailly.com	DELIVERED	

PASSWORD CHANGES LOGGED IN SYSTEM NOTES

- Requests to change a password are now logged in system notes on an entity record. Changes are logged no matter who or what initiates the request. System notes now capture successful changes requested through the UI, web services, or RESTlets. Administrators can view the password change information in the system notes for the following entity records: Employee, Customer (including Prospect records), Partner, and Vendor.

LOCK TIMESHEET PERIOD

- In NetSuite 2019.2, you can now disable employees' ability to submit, edit, or add a time entry within a specific time period. You can choose to lock time entries for closed fiscal periods or on a weekly or monthly basis. To set a timesheet lock, go to Setup > Accounting > Preferences > Accounting Preferences and click Time & Expenses. Under Time Tracking, in the Lock Timesheet Period field, select the time period after which you want time entries to be locked. If you select Weekly or Monthly, you can also enter a number in the Grace Period field to specify the number of days time entries remain open after the selected period. Timesheet locking is dependent on which day of the week your timesheets begin. For example, if you close timesheets every week, enter two in the Grace Period field, and your timesheets begin on Monday, they lock on Wednesday each week.

LOCK TIMESHEET PERIOD

- Setup > Accounting > Accounting Preferences > Time & Expenses

Time Tracking

- OVERRIDE RATES ON TIME RECORDS
- REQUIRE APPROVALS ON TIME RECORDS
- ADVANCED APPROVALS ON TIME RECORDS
- COPY SERVICE ITEM DESCRIPTION TO TIME MEMO
- TIME BILLABLE BY DEFAULT
- COPY TIME MEMOS TO INVOICES
- SHOW PLANNED TIME IN TIME ENTRY

ROUND TIME ENTRY DURATION

COPY FROM WEEK OPTIONS

LOCK TIMESHEET PERIOD

GRACE PERIOD (IN DAYS)

OFFLINE TIME AND EXPENSES LOGGING

You can now log expenses and time offline, without being logged into the application. Expense and time logs are stored locally on the device and remain there until they are submitted to NetSuite. This makes it particularly useful during downtimes, such as air travel, when you want to catch up on admin tasks, but have no internet connection. Both Expense and Time Log for offline use are accessible from the login screen. Users can capture the logs and convert them to Expense Reports and Time Entries once back online.

When editing logs offline, you can edit image or file attachments, date, amount and memo fields, or delete the log. You can also edit category and currency fields if you are editing a log that was originally created online.

THANK YOU!

Cory Anderson
Senior NetSuite Consultant
csanderson@eidebailly.com



NetSuite Implementation, Consulting, and Support

