



# ScaleNorth NetSuite MasterClass – Session 3 – Automate your Financial Processes with Vena

December 6, 2024

# Confidentiality Notice

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# Objective

- ▲ We have started hosting these monthly NetSuite Master Classes, because we have found most common challenges people have with NetSuite
  - Lack of Training
    - Take advantage of saved search reporting
    - CSV Imports
    - Mass Updates
    - Simple workflows to automate processes
    - Custom Records, Forms, Fields
    - Advanced PDFs
  - Don't Know what I don't Know
- ▲ Our goal is to teach these things so companies and more importantly their employees can maximize the value and utility they get out of the NetSuite Platform/Ecosystem
- ▲ One area we have received feedback in our survey of Topics is people want to learn some of the latest and greatest from Technology Partners within the NetSuite EcoSystem.
  - Excited to have our first Technology Partner be Vena Solutions. Have been game changer for our customers in automating/transforming their financial process!

# Agenda

## ▲ Introductions

- ScaleNorth
  - Quick ScaleNorth Overview
- Vena
  - Quick Vena Overview

## ▲ Examples and Use Cases

- Automate your Financial Process
  - Budgeting
  - Forecasting
  - Reporting
- Closing Remarks

## ▲ Live Q&A

- Vena
- NetSuite

## ▲ Next Steps

# Introductions



**Charles Stevenson**

Vice President, Sales

- ▲ Managed Sales Teams for Two Fortune 500 Companies over two decades
- ▲ BS Accounting from USC



**Dean Carazza, CPA**

Sr. Business Development Manager

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714-350-6211

- ▲ 14 years of experience
- ▲ Public and Private Accounting
- ▲ 8 years NetSuite Experience
  - 2 Years Private/User - Assistant Controller for \$100M Distributor in Irvine
  - 6 years ScaleNorth
    - Led some of the largest and most complex implementations and integrations. Have done over 20 implementations.
  - Industry experience
    - Manufacturing, E-Commerce and Warehouse/Distribution SaaS, Professional Services

# Meet The Team

“

We wanted a partner that could deliver fast solutions, communicate with us and keep us up to date on the status of our ERP project...ScaleNorth covered all of these bases while delivering world-class service. It's been fantastic.

Jerod Schoneman  
General Manager, Total Energy Systems



270+  
Team  
Members



1,300+  
Years of Collective  
NetSuite ERP  
Experience

ORACLE NETSUITE  
BPO Partner



650+  
NetSuite  
Certifications  
Held by Staff



8.0+  
Avg Years of  
NetSuite  
Experience

ORACLE NETSUITE  
Solution Provider



\$2.5B+  
Annual Revenue  
Transactions  
Processed



56%  
Percentage  
of staff with  
CPAs

ORACLE NETSUITE  
SuiteCloud Developer Network

# Services at a Glance



NetSuite  
Implementation



Outsourced  
Accounting



NetSuite  
Consulting &  
Managed Services



Technical  
Services

# Technology Partners



# Introductions



**Matt Levine**

Regional Sales Manager, Vena



**Aaron Drake, CPA**

Solutions Consultant with  
NetSuite background, Vena

# Finance Maturity Model Sample



## LONDON FP&A BOARD: FINANCE MATURITY MODEL

	DEVELOPING STATE		INTERMEDIATE STATE	LEADING STATE	
	1. Basic	2. Developing	3. Defined	4. Advanced	5. Leading
<b>Process</b>	No formal process	Inconsistent process	Defined process	Enterprise-wide processes	Integrated planning process
<b>Analytics</b>	No established analytical matrixes	Basic analytics and reporting matrixes	Defined analytical matrixes	Multidimensional analytics matrixes	Leading analytical matrixes
<b>Planning Models</b>	No planning model and tools	Basic planning model and tools	Defined planning model and system	Driver based planning model and system	Integrated driver-based planning model and system connected with BI
<b>Business Intelligence</b>	No BI tool	Basic BI tool	Defined BI	Advanced BI	
<b>Collaboration</b>	No collaboration	Minimal collaboration	Some elements of collaborative planning	Collaborative planning	Real-time collaborative planning
<b>Self-reliance</b>		Highlight manual process	Heavy reliance on IT	Self-service finance planning tool	Easy multidimension scenario analysis
<b>Advanced Analytics</b>		Description analytics	Descriptive and diagnostic analytics	Predictive analytics	Advanced analytics

# The Vena Approach

Is Flexible, Analytical and Intuitive

Vena is an extensible CPM platform that integrates the best of Microsoft 365 and world class AI capabilities with CubeFLEX™

Source Systems

Vena CubeFLEX™

Vena Process Manager and Collaboration

Vena Insights

Communication and Alignment

Vena Copilot

Hey Copilot, are there any seasonal patterns in my revenue by product? RG

# Vena At A Glance



EMPLOYEES  
750+

PARTNERS  
160+

CUSTOMERS  
1800+

USERS  
100k

TOTAL FUNDING AMOUNT  
\$450M

TOTAL SOURCE SYSTEMS INTEGRATED  
100s

CERTIFICATIONS  
AICPA, SOC Audited, CSA  
STAR Level 1, CSA Trusted  
Cloud Provider

## AWARDS



LEADER  
2024

LEADER  
2024

LEADER  
2024

TOP RATED  
2024

CORE VENDOR  
& LEADER  
2024

EXEMPLARY  
PROVIDER  
2024

BEST IN CLASS  
2024

## SATISFACTION



13 years  
Empowering the  
office of finance



94% CSAT  
Customer  
satisfaction score



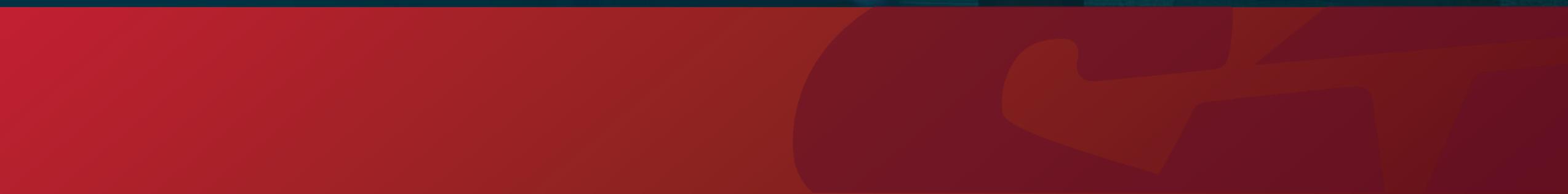
100% Customer  
Recommend  
Scores



## NETSUITE CUSTOMERS



# Automate your Financial Processes with Vena



Questions?

# Next Steps

- ▲ Going to send out Recording and This Deck to all those Registered and who attended today
- ▲ If you would like to learn more about Vena or get your questions answered can use the link below
  - [Vena-Learn More](#)
- ▲ Will be hosting monthly with next one targeted to be Friday 01/10/25 12–1PM PST
  - Target Agenda:
    - Automating Processes in NetSuite
    - Use Cases
      - Automating creation of Lead/Customers using an Online Form
      - Automating a New Vendor Setup request using custom record:Online Form to get New Vendor Details and Workflow to automate creating Vendor Record in NetSuite
- ▲ If you have any NetSuite pain points, enhancements, integrations or any questions we would be happy to setup a quick chat and see how we can help
  - Send me an email or give me a call or grab time on my calendar
    - [dcarazza@scalenorth.com](mailto:dcarazza@scalenorth.com)
    - 714-350-6211
    - <https://calendly.com/dcarazza-1>



NetSuite Consulting, Implementation and  
Outsourced Accounting Services

THANK YOU!

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