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ScaleNorth NetSuite CFO Tool Kit MasterClass

10/11/2024

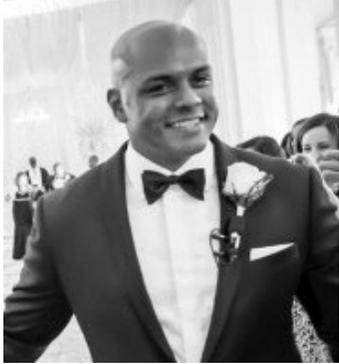# Confidentiality Notice

Agenda

▲ Introductions

▲ Quick ScaleNorth Overview

▲ NetSuite CFO Tool Kit MasterClass

   - Dashboards

   - Analytics/Pivot Tables

   - Saved Searches

   - KPIs/Scorecards

   - Live Q&A to ask your questions

▲ Next Steps

Introductions

Charles Stevenson

Vice President of Sales

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

Dean Carazza, CPA

Sr. Business Development Manager

- 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

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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

260+
Team Members

650+
NetSuite Certifications Held by Staff

$2.5B+
Annual Revenue Transactions Processed

1,250+
Years of Collective NetSuite ERP Experience

7.5+
Avg Years of NetSuite Experience

58%
Percentage of staff with CPAs

ORACLE NETSUITE
BPO Partner

ORACLE NETSUITE
Solution Provider

ORACLE NETSUITE
SuiteCloud Developer Network

Services at a Glance

NetSuite Implementation

Outsourced Accounting

NetSuite Consulting

Technical Services

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Technology Partners

Dashboards

- ▲ Overview
  - Definition
    - a graphical summary of various pieces of important information, typically used to give an overview of a business

  - Is available not only on home page, but on every page you see in NetSuite except Documents, Setup, and Customization pages

  - Dashboard content is displayed in a variety of portlets (dynamic data display windows). Some provide direct access to raw data, and others display data that has been synthesized into critical business metrics such as KPIs, Scorecards, Trend Graphs, Chart-based workbooks, and Report snapshots.

Dashboards

▲ Dashboard Portlets
 - Click personalize to see which Portlet Types are available to be added to your home dashboard

Content	Description
Bank Reconciliation Summary	Lists your bank and credit card accounts and displays the key data for matching and reconciliation activities
Analytics	Shows one workbook chart, pivot table, or table view per portlet. (Can display up to 10)
Calendar	Lists activities for a selected period ordered by date and time, with links to drill down into individual activity records
Custom Portlet	Shows results from a portlet SuiteScript, which can be lists, data entry forms, free-form HTML, or links to external data. (Can display up to six)
Custom Search	Shows results from a saved search (Can display up to six on the Home page)
Goals	To use the Goals portlet, the Performance Management feature must be enabled in your account
KPI Meter	Shows up to three graphical meters of key performance indicator (KPI) data. The KPI meter also displays the currency symbol of the data for values represented by currencies.
KPI Scorecard	Shows a performance scorecard with comparisons of selected key performance indicator (KPI) data
Key Performance Indicators	Shows key business metrics. These metrics are summary data from reports or saved searches for selected date ranges, with options to show comparisons between date ranges and to highlight results not meeting defined thresholds. You can define up to eight KPIs as headlines. Each KPI headline appears in bold and is represented in a trend graph. The lower panel lists the rest of KPIs. You can collapse and expand the list of KPI as needed.
Links	Shows links to pages that NetSuite has defined as related.
List	Shows a list of records of a selected type, with links to view, and if you have permission, to edit, individual records. Shows 9 columns when placed in the center column of the dashboard; shows 4 columns when placed in the right or left column.
My Login Audit	Shows information about your login activity. You can display the My Login Audit portlet on your dashboard to track your previous successful login, your previous failed login, the IP address associated with your login activity, the date when your password will expire, and other login information.
New Release	Shows a summary of new features from the latest release of NetSuite, with links to more detailed descriptions.

Dashboards

▲ Dashboard Portlets Continued

Content	Description
Phone Calls	Shows a list of upcoming phone calls, with links to view, and if you have permission, to edit, individual records.
Project Tasks	Available when the Project Management feature is enabled. Shows a list of project tasks with links to view, and if you have permission, to edit, individual records. Shows project tasks assigned to you and other project resources,
Quick Add	Shows a form where you can quickly add records of a selected typ
Quick Search	Shows a form where you can quickly search for records of a selected type, using one selected filter field and entered keywords.
RSS/Atom Feed	Shows RSS or Atom feed URL content, from an external website or HTML document. Example any RSS Feed Site like News Headlines can copy and paste and then have displayed directly in your NetSuite account.
Recent Records	Shows a list of records that you have recently created, modified, or viewed.
Recent Reports	Shows a list of reports that you have recently created, modified, or viewed
Reminders	Shows important tasks of selected types, usually that are past due or soon due to be completed.
Report Snapshots	Each added portlet provides a graphical or list summary of a selected standard or custom report's data, with a link to view the underlying report. (Can Display up to 10)
Saved Searches	Shows the top ten saved searches in your account, including their execution time and the number of users who have accessed the search during a specified period.
Scheduler	Shows an interface where you can view others' schedules and add activities. (Available on the Activities page)
Search Form	Shows a form to search for records of a selected type. Filter fields are based on system-defined defaults or a custom search form that you defined as preferred.
Settings	Shows links to user-level setup tasks.
Shortcuts	Shows links to selected pages, so you can go to frequently used pages quickly. In the portlet, click Set Up to reorder the listing of existing shortcut links or click New Shortcut to add a shortcut, if you know the URL of the page. If you do not know the URL, go to the upper right corner of that page, and then from the More list, select Add to Shortcuts.
SMT Links	The Site Management Tools Links portlet shows links to all available domains in your administrator role. In the portlet, use the dropdown menu to choose from your available websites. After you have chosen the website, you can choose to Preview or Edit any of the available domains.
Tasks	Shows a list of upcoming CRM tasks assigned to you, with links to view, and if you have permission, to edit, individual records.
Trend Graphs	Shows up to three Key Performance Indicators (KPIs) in a single chart with time-based X axis. (Can Display up to 5)

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Dashboards

▲ Dashboard Examples

- Home Dashboard

  ▪ Can personalize and select which portlets want to add to your home dashboard. Can lock and publish certain Dashboard Settings to particular roles so teams work with same dashboard view.
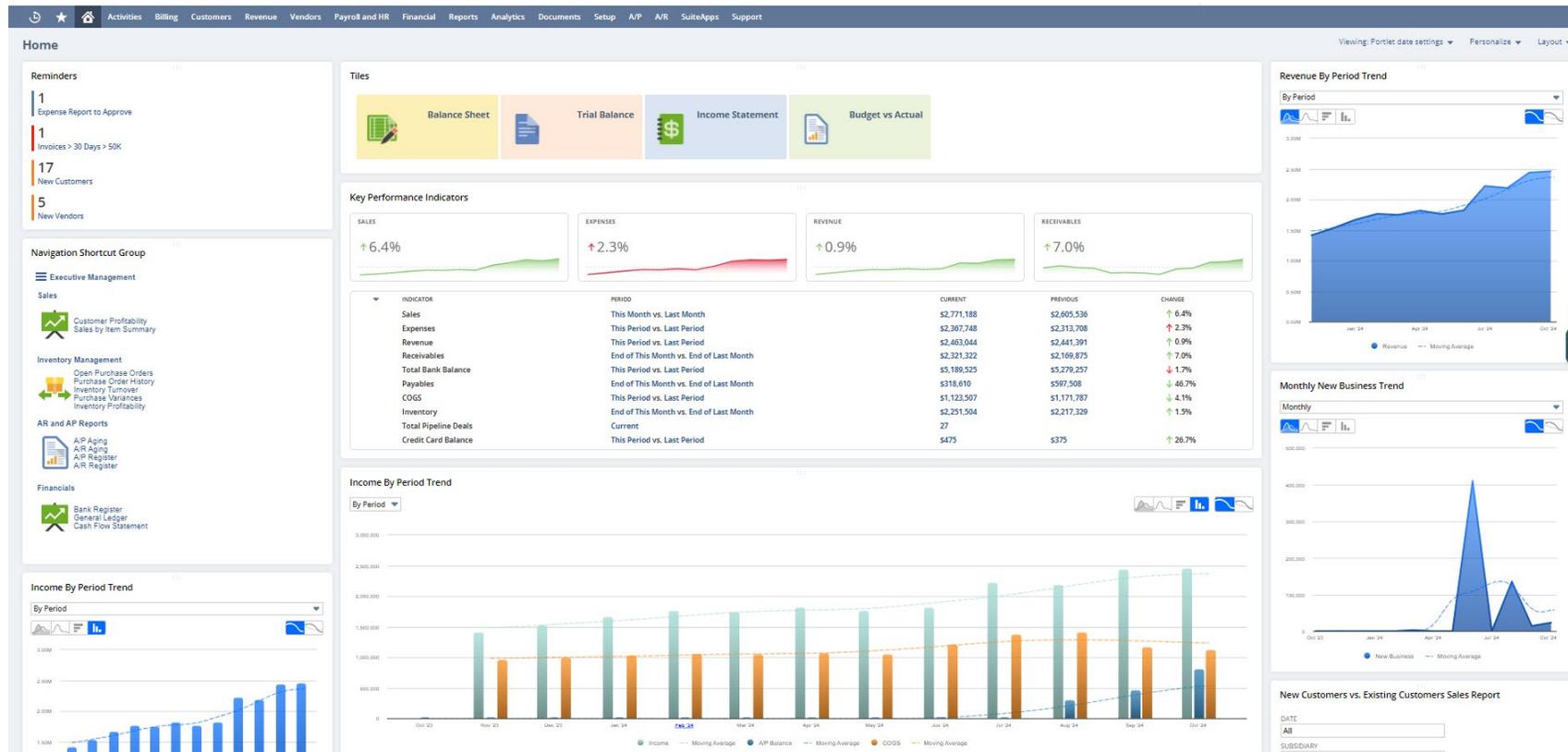
Dashboards

▲ Dashboard Examples

- Customer Dashboard

  ▪ From Customer record select the meter icon

Dashboards

▲ Dashboard Examples

- Vendor Dashboard
  - From Vendor record select the meter icon

Dashboards

▲ Dashboard Examples

- Project Dashboard
  ▪ From Project record select the meter icon

Analytics/Pivot Tables

▲ Overview

Custom Workbooks and Datasets

In SuiteAnalytics Workbook, you analyze your company data using two distinct objects: a dataset and a workbook.

Datasets are the basis for all workbooks and workbook visualizations in your account. In a dataset, you combine record type fields and criteria filters to create a query. The results of this query act as the source data for your workbook visualizations. A single dataset can be used in multiple workbooks and workbook visualizations, so to prevent data discrepancies they can only be edited or deleted by dataset owners or users with the Analytics Administrator permission. Additionally, changes that you make to a dataset are automatically propagated to the workbook visualizations that the dataset is used in. This reduces the need for multiple dataset objects in your account and enables less experienced users to create complex workbooks.

Workbooks are where you analyze the results of your dataset queries using different visualizations, such as tables, pivot tables, and charts. All workbook visualizations are based on a dataset or a set of linked datasets, and you can use different datasets for each visualization in a workbook. You can access the dataset connected to a workbook visualization from the Dataset Panel. Moreover, when you create a new workbook visualization, you can base it on a new custom dataset or any of the existing datasets that you have access to in your account. You can also link two datasets and use them as the basis for your workbook visualizations. This enables you to compare metrics from two datasets in a single visualization.

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Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Need to start with an analytic dataset
  - Navigate to Analytics>Datasets>New Dataset>Transaction Type
    - › Click Save – Will ask you to name your dataset
    - › Click Save

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Need to start with an analytic dataset

  ▪ Navigate to Analytics>Datasets>New Dataset>Transaction Type

    › Click Save – Will ask you to name your dataset

    › Click Save

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Add filters to dataset
  - Transaction Accounting Line>Account>Type – Is Income
  - Transaction>Posting- Is True

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Next, want to make sure we have columns in dataset that we will want for Pivot. For this example need at least the following columns/fields:
  - Transaction>Date
  - Transaction Line>Subsidiary
  - Transaction Line>Class
  - Transaction Accounting Line>Account
  - Transaction Accounting Line>Amount

- Note/Tip – if you click on three dots of column there is an option to show location of field in field list which helps make sure sourcing the right field

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating a Formula Field
  - Note the native amount field shows the amounts in their debits and credits. Example, revenue is shown as negative since natural sign is a credit. We want to create a simple formula field that will show revenue as positive numbers for our dataset and Pivot we create.
  - Click on the Formula in the left navigation pane and then hit New Formula Button
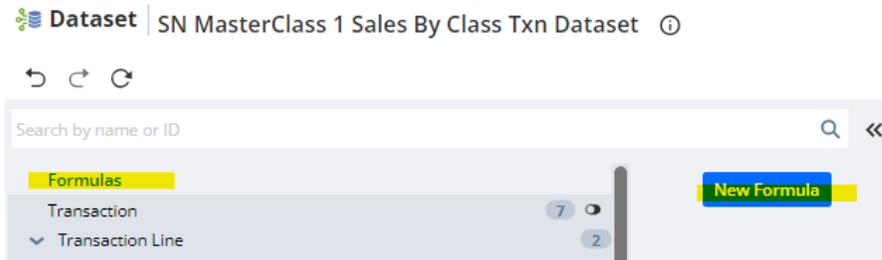
    › Name the Field = Amount
    › Scroll to choose Amount Field we want to do formula on, which in this case is Transaction Accounting Line: Amount – Double click field to add to Formula Window, set output type as float, and put negative sign at very beginning to change the sign from negative to positive. Hit Save.
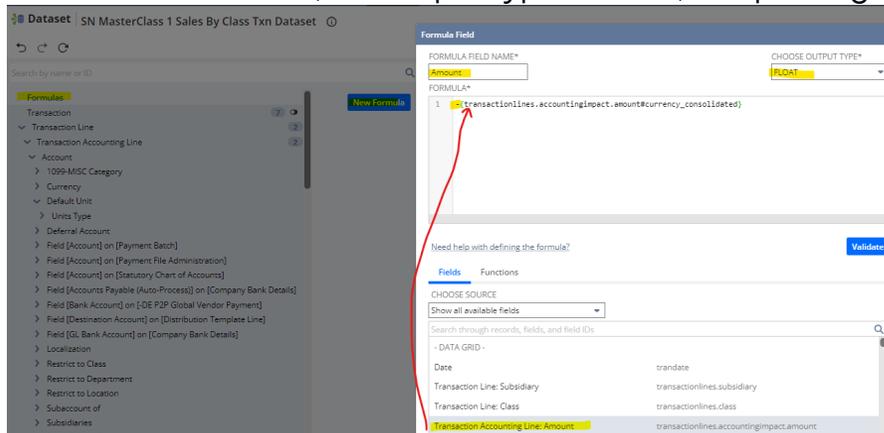
Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Drag new formula amount field into dataset and should be able to see now that instead of amounts showing negative they show as positive values

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating a New Workbook-Pivot Table
  - Now that have our dataset, we can create our Workbook which where we will create our Pivot
  - From the dataset click the create New Workbook Button
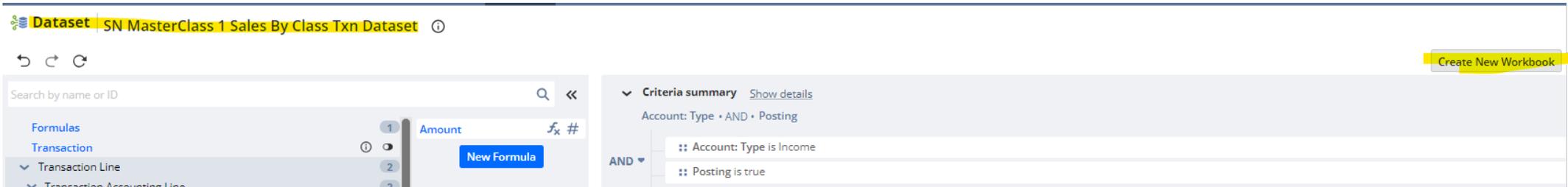
  - Choose your visualization type
    › Pivot
    › Click connect Dataset Button
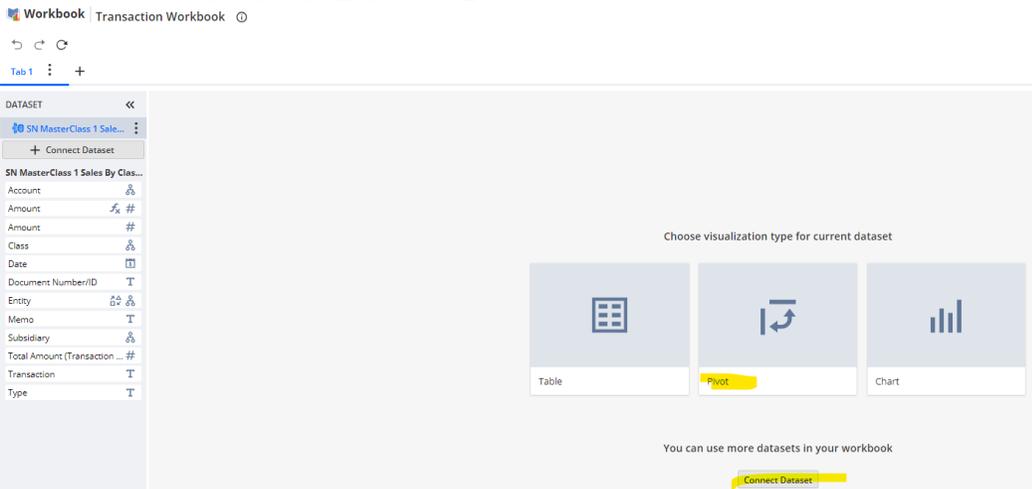
Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating New Workbook-Pivot Table

   ▪ In order to save your workbook, you will first have to start adding data to the Pivot. Add the following:

   ▪ Rows

      › Account

      › Entity

   ▪ Columns

      › Class

   ▪ Measures

      › Amount Fx (This is the custom amount field we created in the dataset)

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating New Workbook-Pivot Table
  - In order to see data show up in your Pivot or pull updated results in Pivot you can hit the refresh button in the Pivot table

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating New Workbook-Pivot Table
  - Next will want to add subtotals to your Pivot
  - Click Collapse Button to collapse the Pivot
  - Click on the Sum Icon
    › Set individually, bottom for account, bottom for Entity>Then hit Ok
    › Refresh to see results

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating New Workbook-Pivot Table
  - ▪ Next will want to add Grand Totals
  - ▪ Can do this to the columns by selecting the 3 dots for the Class Field in your Columns and then clicking the Show Grand Total and then Refresh the Pivot

	Class A	Class C	Class D	Class B	- No Class -	Grand Total
Account	Amount (Sum)	Amount (Sum)	Amount (Sum)	Amount (Sum)	Amount (Sum)	Grand Total Amou...
> 4210 Revenue - Services	200,000.00	3,978,483.83	1,990,442.08	27,722,923.69	7,000.00	33,898,849.60
> 4310 Revenue - Products	6,375,241.60			140,152.50		6,515,394.10
> 4410 Reimbursed Expenses			3,269.50			3,269.50
Grand Total	6,575,241.60	3,978,483.83	1,993,711.58	27,863,076.19	7,000.00	40,417,513.20

Analytics/Pivot Tables

▲ Example 1 – Sales by Class
  - Creating New Workbook-Pivot Table
    ▪ Can rename the Amount field so doesn't show as Amount (Sum)

Account		Class A	Class C	Class D	Class B	- No Class -	Grand Total
		Amount	Amount	Amount	Amount	Amount	Grand Total Amount
> 4210 Revenue - Services		200,000.00	3,978,483.83	1,990,442.08	27,722,923.69	7,000.00	33,898,849.60
> 4310 Revenue - Products		6,375,241.60			140,152.50		6,515,394.10
> 4410 Reimbursed Expenses				3,269.50			3,269.50
Grand Total		6,575,241.60	3,978,483.83	1,993,711.58	27,863,076.19	7,000.00	40,417,513.20

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Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating New Workbook-Pivot Table
  - Can add any filters you want to the Pivot. In this case want to add dynamic date filter to be filtered to this year to date.

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating New Workbook-Pivot Table
  - Always best practice to validate your data. Can validate by running an Income Statement by Class this year to date and see if get the same results as Pivot Table

⌄ **1 filter applied**   Remove all

Date within this year to date

Class ⋮

Account − + ⋮	Class A Amount	Class C Amount	Class B Amount	Class D Amount	**Grand Total** **Grand Total Amount** ⋮
› **4210 Revenue - Services**	200,000.00	1,927,133.65	13,363,472.13	964,766.88	16,455,372.66
› **4310 Revenue - Products**	3,239,052.26		120,204.00		3,359,256.26
Grand Total	3,439,052.26	1,927,133.65	13,483,676.13	964,766.88	19,814,628.92

Income Statement   ⤢ View Detail

FINANCIAL ROW	- NO CLASS - Amount	CLASS A Amount	CLASS B Amount	CLASS C Amount	CLASS D Amount	TOTAL Amount
⊟ **Ordinary Income/Expense**						
⊟ **Income**						
⊟ **4000 - Sales**						
4210 - Revenue - Services	$0.00	$200,000.00	$13,363,472.13	$1,927,133.65	$964,766.88	$16,455,372.66
4310 - Revenue - Products	$0.00	$3,239,052.26	$120,204.00	$0.00	$0.00	$3,359,256.26
Total - 4000 - Sales	$0.00	$3,439,052.26	$13,483,676.13	$1,927,133.65	$964,766.88	$19,814,628.92
Total - Income	$0.00	$3,439,052.26	$13,483,676.13	$1,927,133.65	$964,766.88	$19,814,628.92

Analytics/Pivot Tables

▲ Example 1 – Sales by Class

- Creating New Workbook-Pivot Table
  - Adding your Pivot Table created to your Home Dashboard
  - Click Home Icon>Personalize>Analytics

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Need to create a Analytic dataset that has both Income and COGS account types
  - We can leverage the dataset from the last example by saving a copy and just modifying a bit.
  - Navigate to analytics>datasets> can filter for My Datasets – click on the one from last example and do save as

- Saved as – Gross Profit%by Sub Txn dataset

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

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  - We can leverage the dataset from the last example by saving a copy and just modifying a bit.
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- Saved as – Gross Profit%by Sub Txn dataset

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Now that have saved as new dataset, need to add a filter to account type to include Cost of Goods Sold and add a few formula fields for Income and Costs of Goods Sold so we can pivot them in our Pivot Chart later

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Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Next make sure you have the Transaction Accounting Line>Account>Type field included in your dataset

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Now we are going to add a formula field so we can get separate amount fields for Income and Cost of Goods Sold so can easily use them in our Pivot Chart as a calculated measure later

- Click to add a New Formula Field

- We are going to add a case when formula for when Account Type = Income

  ▪ case when {transactionlines.accountingimpact.account.accttype#display}='Income' then –{transactionlines.accountingimpact.amount#currency_consolidated} else 0 end

  ▪ Click validate to ensure green checkmark/okay formula

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Now we are going to add a formula field so we can get separate amount fields for Income and Cost of Goods Sold so can easily use them in our Pivot Chart as a calculated measure later

- Click to add a New Formula Field
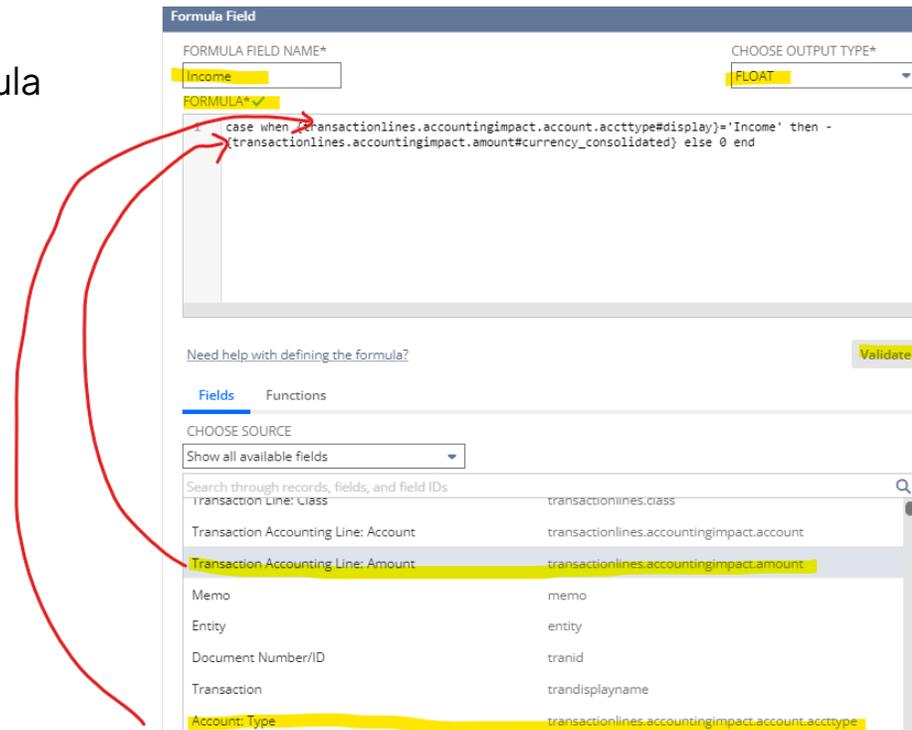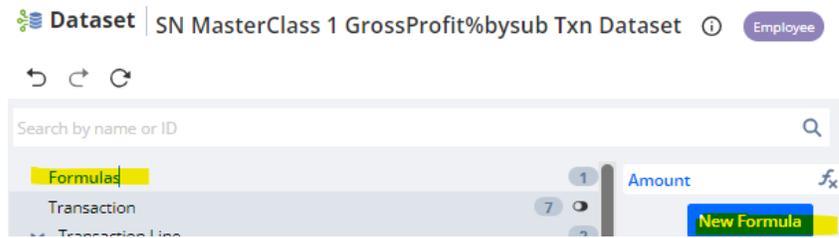
- We are going to add a case when formula for when Account Type = Cost of Goods Sold

  ▪ Case when {transactionlines.accountingimpact.account.accttype#display}='Cost of Goods Sold' then – {transactionlines.accountingimpact.amount#currency_consolidated} else 0 end

  ▪ Click validate to ensure green checkmark/okay formula
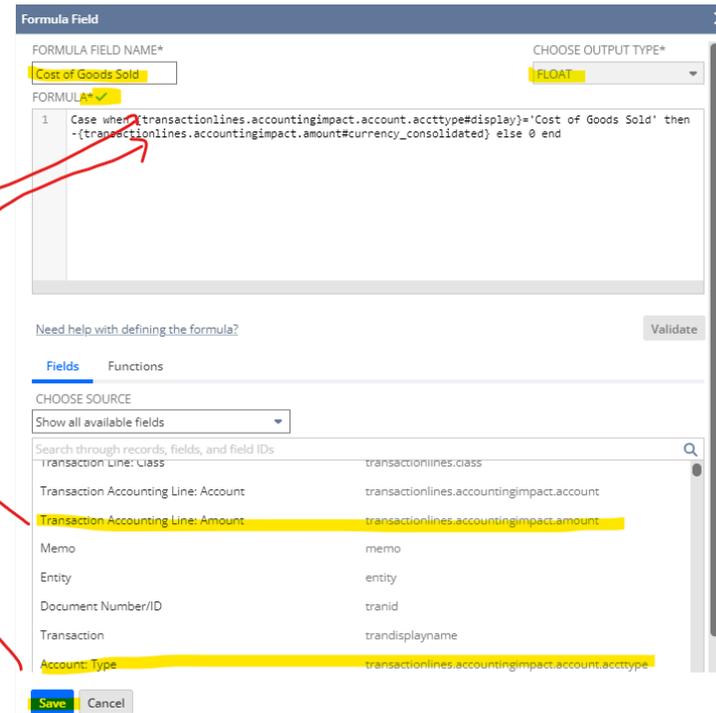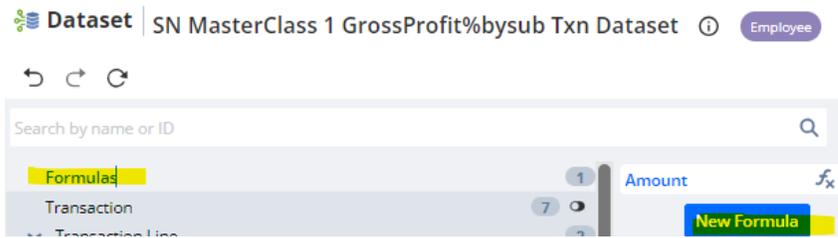
Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Drag both new Income and Cost of Goods Sold formula fields to your dataset and confirms looks like populating values based on correct account type for each

|

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Next we can proceed to creating our Pivot Chart now that we have our dataset ready
- Click the Create New Workbook Button within the dataset and select Chart as Type

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart
  - Create Pivot Chart
  - Drag the Following Fields to the Pivot Chart Area
    ▪ Layout
      › Line Chart
    ▪ X-Axis
      › Date (Month)
    ▪ Series
      › Subsidiary
    ▪ Save the workbook and rename the pivot tab
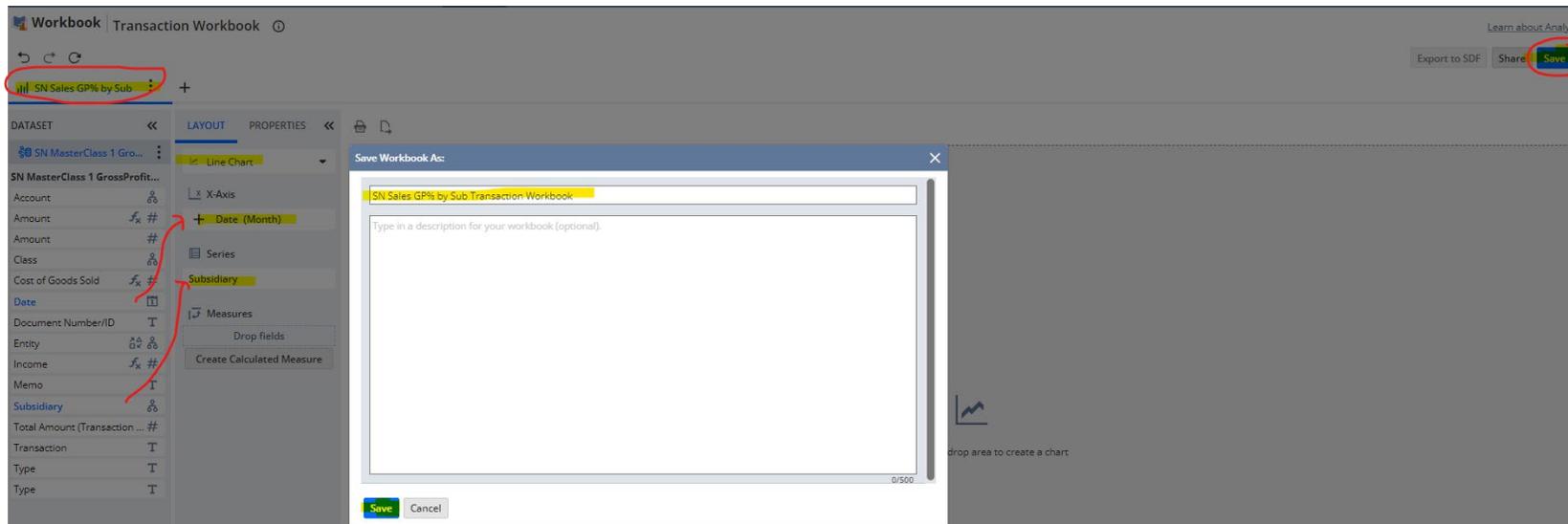
Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Next we need to add a measure to refresh the data/display results
- We are going to use a calculated measure to calculate GP% using the Income and Cost of Good Sold formula fields we added in our dataset
- After adding calculated measure for GP% hit Refresh

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Format Calculated Measure as %

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Add a Dynamic Date Filter for This Year to Date (hit Refresh after)

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Add a Dynamic Date Filter for This Year to Date (hit Refresh after)
- Can see date is filtered this year to date in filter region and GP% is formatted as %

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- We can cleanup by adding a Chart Title and X and Y axis Titles
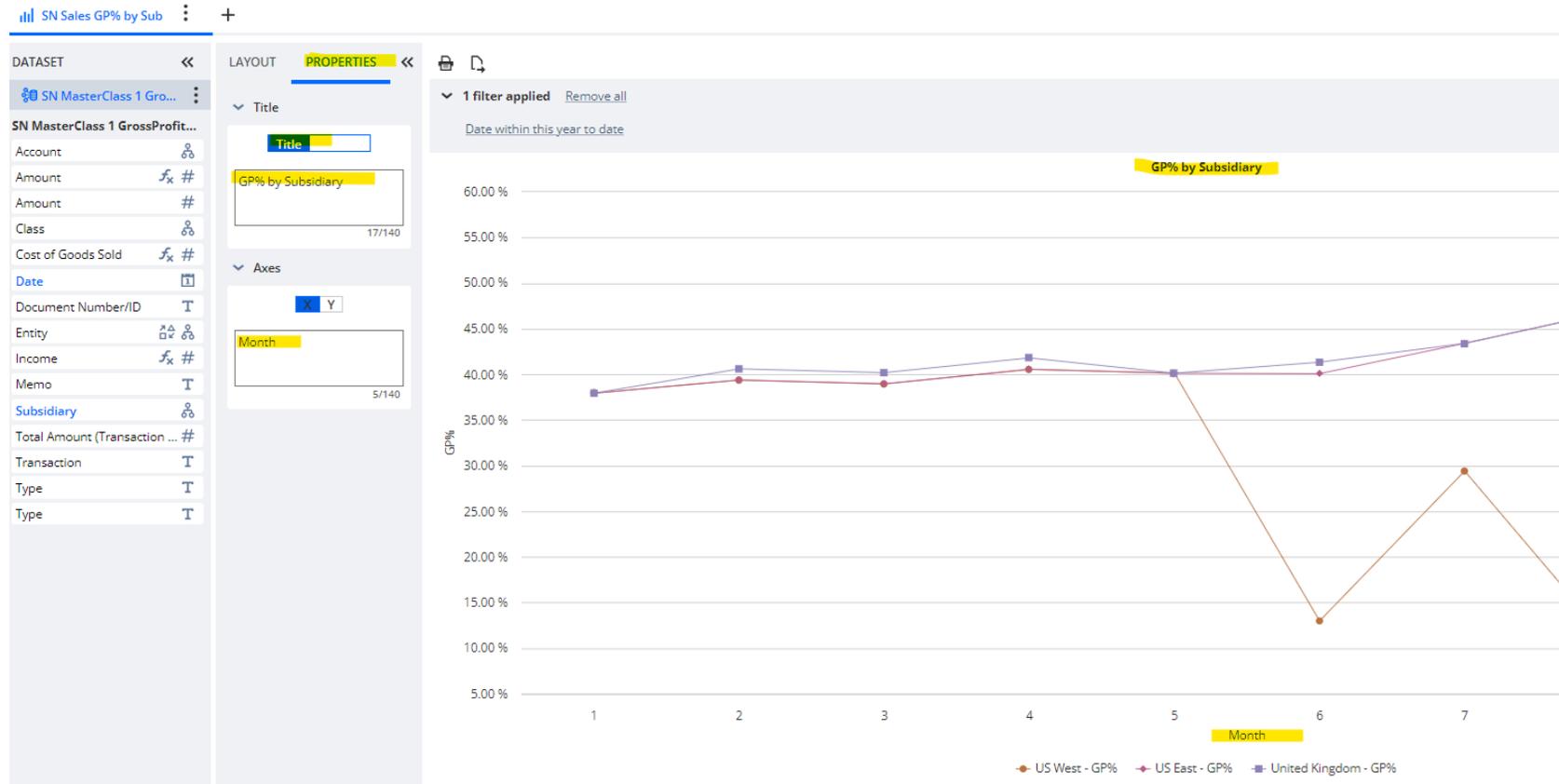
Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Can sort Pivot Chart to show Largest to Smallest GP%

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Spot check/validate the data. I created a quick Pivot Table in same workbook linked to same dataset of Income, Cost of Goods Sold, and GP % by Sub to tie out to P&L and validate/spot check for accuracy

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Spot check/validate the data. I created a quick Pivot Table in same workbook linked to same dataset of Income, Cost of Goods Sold, and GP % by Sub to tie out to P&L and validate/spot check for accuracy

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

- Adding Pivot Chart to Home Dashboard
- Home>Personalize>Analytics>Select Pivot Chart

Analytics/Pivot Tables

▲ Example 2– Gross Profit % by Subsidiary Pivot Chart

  - Adding Pivot Chart to Home Dashboard

Saved Searches

▲ Example 1– DSO Sales Saved Search

  - Going to create a custom transaction search that filters sales to Product and Service sales and not all income account types (Ex discounts, write off, etc.)
  - We can then use this saved search in our KPIs and Scorecards later
  - Criteria Tab

Saved Searches

▲ Example 1– DSO Sales Saved Search

- Results Tab
  - Note, should only be one result if going to use in KPI and Scorecards

Saved Searches

- ▲ Example 1– DSO Sales Saved Search
  - Available Filters Tab
    - ▪ Note need a date filter if will use in KPI and Scorecards

Saved Searches

▲ Example 1– DSO Sales Saved Search

  - We can now Save/Run the Search

    ▪ We can now use this in our KPI and Scorecards later

    ▪ Criteria Tab

Saved Searches

▲ Example 2– Customers on Credit Hold
- Going to create a custom Customer Search that identifies all customers on credit hold
  ▪ We can then use this saved search to add to our home dashboard as a reminder later
- Criteria Tab

Saved Customer Search

Save & Run ▾ | Cancel | Preview | Actions

SEARCH TITLE *
SN Reminder Customers on Credit Hold

ID

☑ PUBLIC
☑ AVAILABLE AS LIST VIEW

☑ AVAILABLE AS DASHBOARD VIEW
☑ AVAILABLE AS SUBLIST VIEW
☑ AVAILABLE FOR REMINDERS
☑ SHOW IN MENU

Criteria Results Highlighting Available Filters Audience Roles Email Audit Trail Execution Log Search Title Translation

ⓘ Use this tab to specify criteria that narrow down your search.

☐ USE EXPRESSIONS

Standard Summary

FILTER *	DESCRIPTION *
On Credit Hold	is true

Saved Searches

▲ Example 2– Customers on Credit Hold
  - Results Tab

Saved Searches

▲ Example 2– Customers on Credit Hold

- Save/Run

Saved Searches

▲ Example 2– Customers on Credit Hold
- Add Saved Search as a Reminder on your Home Dashboard
- Navigate to Home>Personalize>Reminders

KPIs/Scorecards

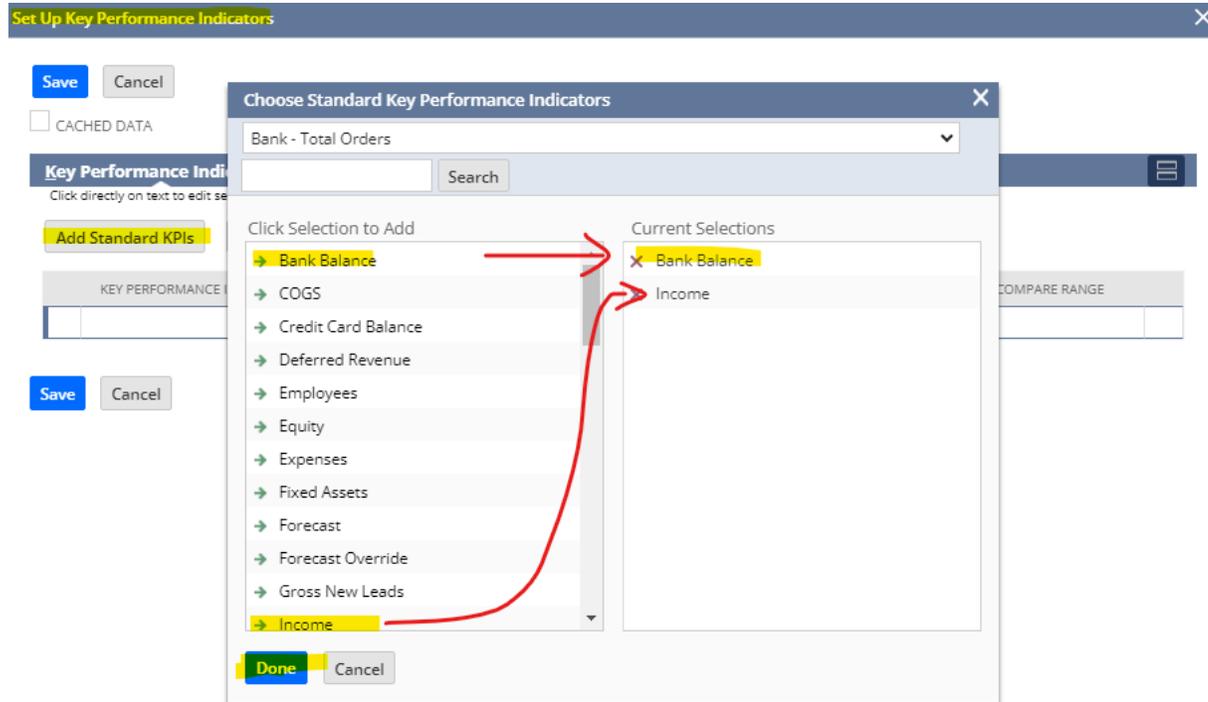▲ Example 1– Key Performance Indicators Portlet

- Going to add Key Performance Indicators Portlet to Home Dashboard including the use of both standard KPIs and our custom KPI using the custom DSO Sales search we created earlier

KPIs/Scorecards

▲ Example 1– Key Performance Indicators Portlet

- Add standard KPIs
  - Bank Balance
  - Income

KPIs/Scorecards

▲ Example 1– Key Performance Indicators Portlet

- Add our custom KPI for DSO Sales
  - ▪ Can search to find

KPIs/Scorecards

▲ Example 2– KPI Meter Portlet

- Now that we have our Key Performance Indicator Portlet added, we can add a KPI Meter and select which KPI we want to display in the meter. For me, I like to see bank balance since cash is KING!!!!!!!!
  - Navigate to Home>Personalize>KPI Meter

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KPIs/Scorecards

▲ Example 3– KPI Scorecard

- We can create a KPI Scorecard and factor in native results as well as formula results and tie in custom searches to be used in formulas/calculations
- First we need to create a scorecard. In search bar can search page: Scorecard – shows list of scorecards

KPIs/Scorecards

▲ Example 3– KPI Scorecard

- Give your New Scorecard a name
- You can see how easy to add native KPIs by selecting those available in the dropdown. What follows is the KPIs, Date Ranges, and Custom Tab that shows the Scorecard created
- KPIs Tab

KPI Scorecard

Edit Back | Actions

ID
custkpiscorecard1

☐ USE PERIODS

DESCRIPTION

NAME
SN KPI Scorecard

OWNER
Kathryn Glass

Content Audience Translation

KPIs • Date Ranges • Custom • Highlighting

KPI	COMPARE VALUE TO	COMPARE WITH PREVIOUS	COMPARISON TYPE	INVERT COMPARISON	FORMULA	LESS IS MORE	HIDDEN	LABEL	TRANSLATION
Bank Balance									
Receivables									
Inventory									
Revenue									
COGS									
Formula (Numeric)					{REVENUE}-{COGS}			Gross Profit	
Formula (Percent)					({REVENUE}-{COGS})/{REVENUE}			Gross Profit %	
Formula (Numeric)					{RECEIVABLES}/{CUSTOM}	Yes		Receivables Turnover	
Formula (Numeric)					{RECEIVABLES}/{CUSTOM}*{Days}	Yes		DSO in Days	

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KPIs/Scorecards

▲ Example 3– KPI Scorecard

- Date Ranges Tab

KPI Scorecard

[Edit] [Back] | Actions

ID
custkpiscorecard1

NAME
SN KPI Scorecard

OWNER
Kathryn Glass

☐ USE PERIODS

DESCRIPTION

Content Audience Translation

KPIs • **Date Ranges** • Custom • Highlighting

RANGE	COMPARE VALUE TO	COMPARE WITH PREVIOUS	COMPARISON TYPE	INVERT COMPARISON	LABEL	TRANSLATION
this month to date						
last month to date						
this month to date	last month to date		Variance (Absolute)		Variance	
this month to date	last month to date		Variance (Percent)		Variance %	
this year to date						
last year to date						
this year to date	last year to date		Variance (Absolute)		Variance YTD	
this year to date	last year to date		Variance (Percent)		Variance YTD %	

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KPIs/Scorecards

▲ Example 3– KPI Scorecard
- Custom Tab
  - Note was able to add our Custom Search for DSO Sales as KPI that was then able to be used in the DSO Formula/Calculations on the Scorecard

KPIs/Scorecards

▲ Example 3– KPI Scorecard
- Adding KPI Scorecard to your Home Dashboard
  ▪ Navigate to Home>Personalize>KPI Scorecard

Questions?

Next Steps

- ▲ Going to send out Recording and This Deck to all those Registered and who attended today
- ▲ Will be hosting monthly with next one targeted to be Friday 11/15/24 12–1PM PST
  - – Thinking next topic will be on workflows
- ▲ 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

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THANK YOU!

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