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ScaleNorth NetSuite MasterClass– Session 10– Automating Reclass Entries Using GL Plugin Script

July 18, 2025

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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

Agenda

- Introductions
  - ScaleNorth
    - Quick ScaleNorth Overview
- Examples and Use Cases
  - Reclass Free Items included on Orders from Cost of Goods Sold to Marketing Expense
- Live Q&A
- 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

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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

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275+
Team Members

680+
NetSuite Certifications Held by Staff

$2.5B+
Annual Revenue Transactions Processed

1,650+
Years of Collective NetSuite ERP Experience

8.5+
Avg Years of NetSuite Experience

57%
Percentage of staff with CPAs

ORACLE NETSUITE BPO Partner

ORACLE NETSUITE Solution Provider

ORACLE NETSUITE SuiteCloud Developer Network

Last updated on February 17, 2025

Services at a Glance

NetSuite Implementation

Outsourced Accounting

NetSuite Consulting & Managed Services

Technical Services

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Technology Partners

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Disclaimer – purpose of this class is for demonstration/educational purposes. Additionally recommend any configuration and testing always be done in a Sandbox environment first before creating/deploying in production. ScaleNorth is not responsible for any actions not performed by ScaleNorth.

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Reclass Free Items on Orders from Cost of Goods Sold to Marketing Expense

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Configuration/Development/Testing

Configuration/Development/Testing

- Configuration
  - We have identified the following Configuration components to setup/put in place for our desired solution
    1. Create a Custom Segment that can be used as identifier for GL Plugin Script to Reclass
       - Reclass Category
         - $0 Sales Price Reclass from COGS>Marketing
    2. Edit Sales Order and Item Fulfilment Forms to show Custom Segment Created
    3. Create a Custom Record for the Mapping that will Map Custom Segment Reclass to which From and TO GL Accounts should be used for the GL Plugin Script
       - Reclass Category = $0 Sales Price Reclass from COGS>Marketing
       - From Account = 5310 Cost of Goods Sold : Purchases
       - To Account = 6750 Expenses : Marketing Expenses
    4. Create a workflow that will automatically set the custom segment Reclass Category on Sales Order lines where the Sales Price = $0 using workflow condition.
- Development
  1. Create GL Plugin Script
     - Will reclass transactions based on Reclass Category Set on Transaction and lookup to Mapping Record Created to get the appropriate From and TO GL Accounts.
- Testing
  - Will test creating SO>IF with $0 SP item to ensure workflow and script work properly.

- What follows are the steps and screen shots to complete the configuration and Development

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1. Configuration>Create Custom Segment

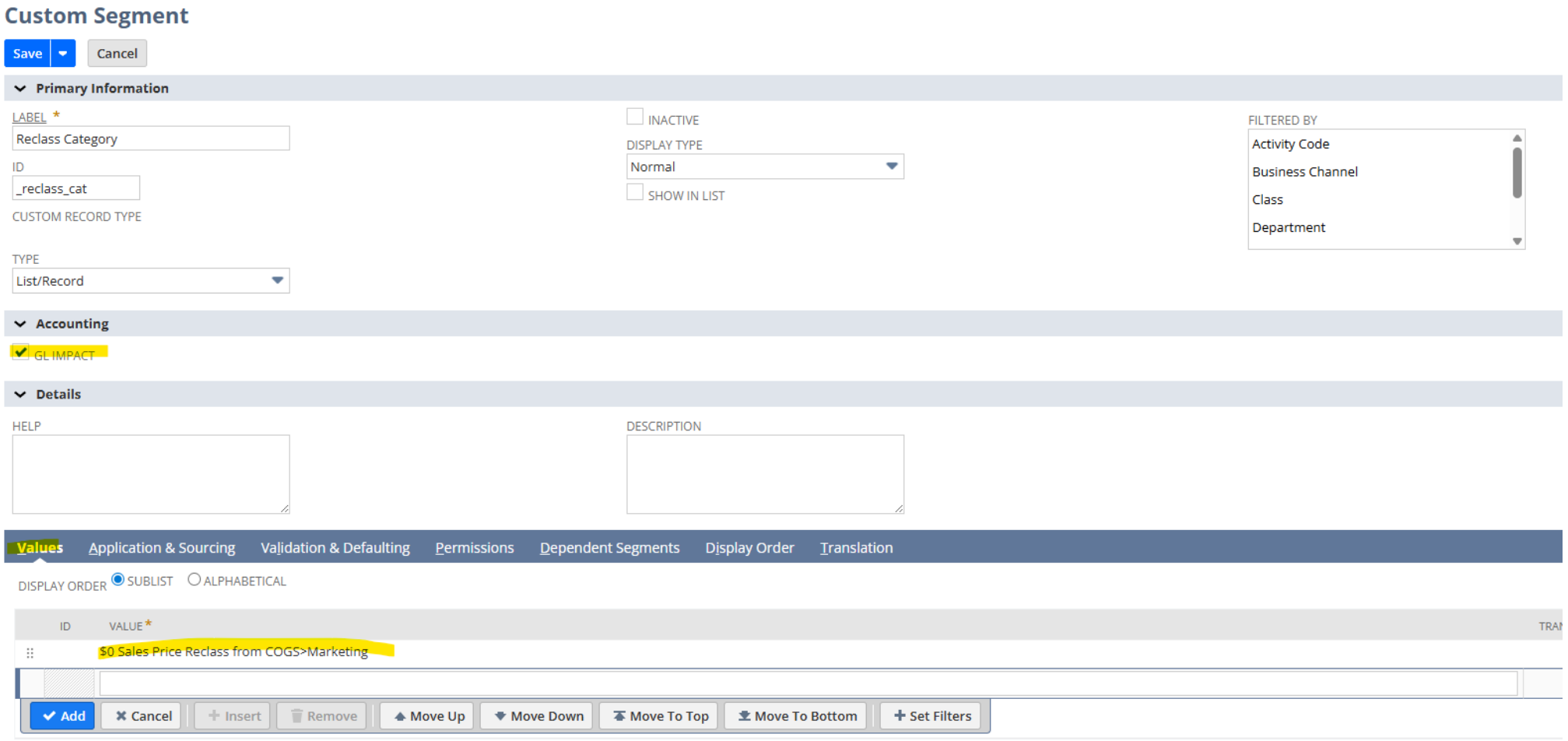
#1 Configuration – Create Custom Segment

- To create custom segment navigate to Customization>Lists, Records, & Fields>Custom Segments>New
  - Primary Information
    - Label = Reclass Category
    - ID = _reclass_cat – *Note very important that IDs will have to be taken/match exactly to ID in Script to work*

```
/**
* @NApiVersion 2.1
* @NScriptType customglplugin
*/
define(['N/search'], (search) => {

    const customizeGlImpact = (context) => {
        const reclassConfig = getMapping();

        const standardLines = context.standardLines;
        const customLines = context.customLines;

        for (let i = 0; i < standardLines.count; i++) {
            const standardLine = standardLines.getLine({ index: i });

            const accountId = standardLine.accountId;
            if (!accountId) continue;

            const reclassCategory = standardLine.getSegmentValueId({ segmentId: 'cseg_reclass_cat' });

            if (reclassCategory && reclassConfig.hasOwnProperty(reclassCategory)) {
                const mapConfig = reclassConfig[reclassCategory];

                const fromAccount = standardLine.accountId;
```

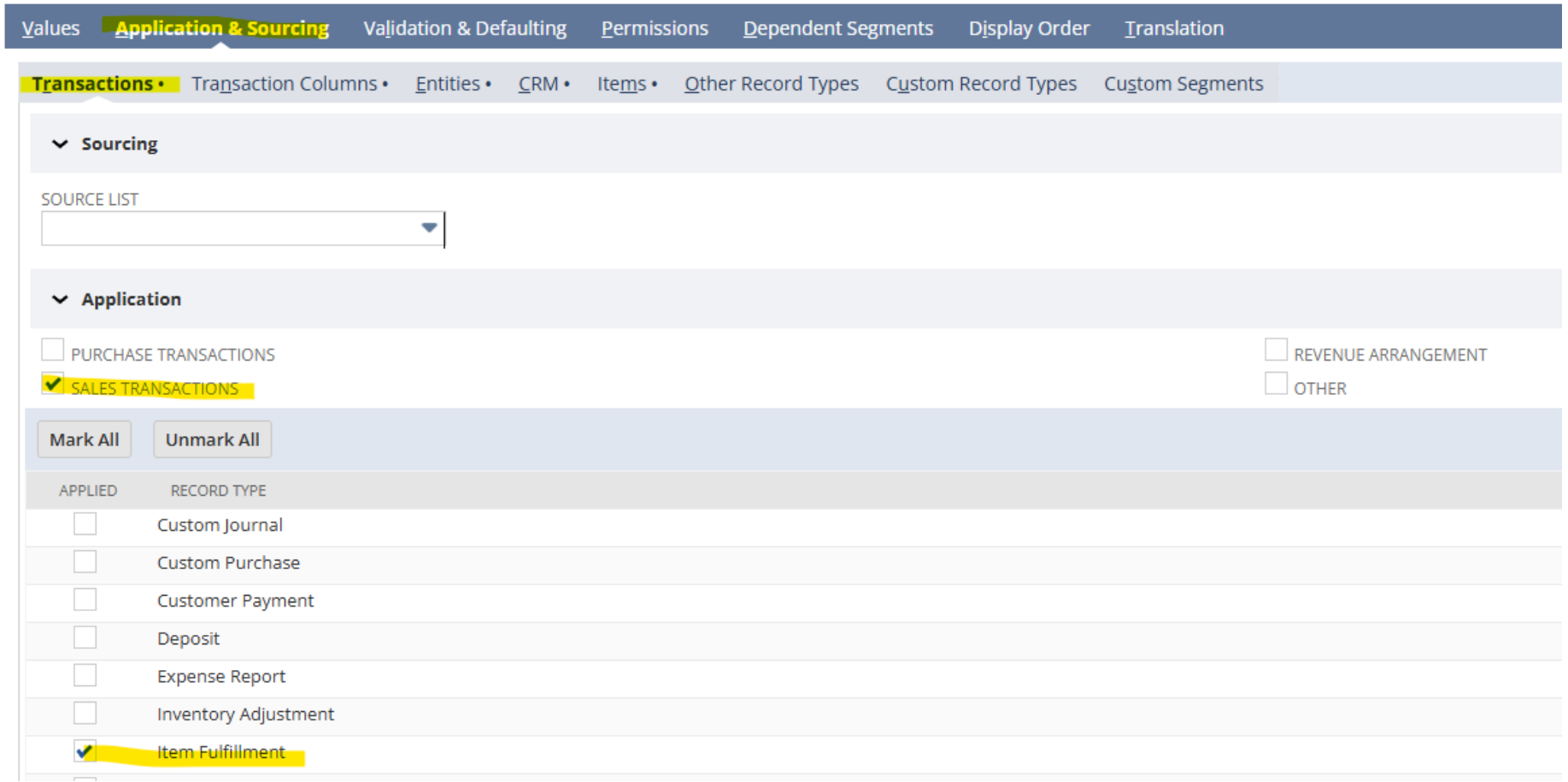
#1 Configuration – Create Custom Segment Continued

- To create custom segment navigate to Customization>Lists, Records, & Fields>Custom Segments>New



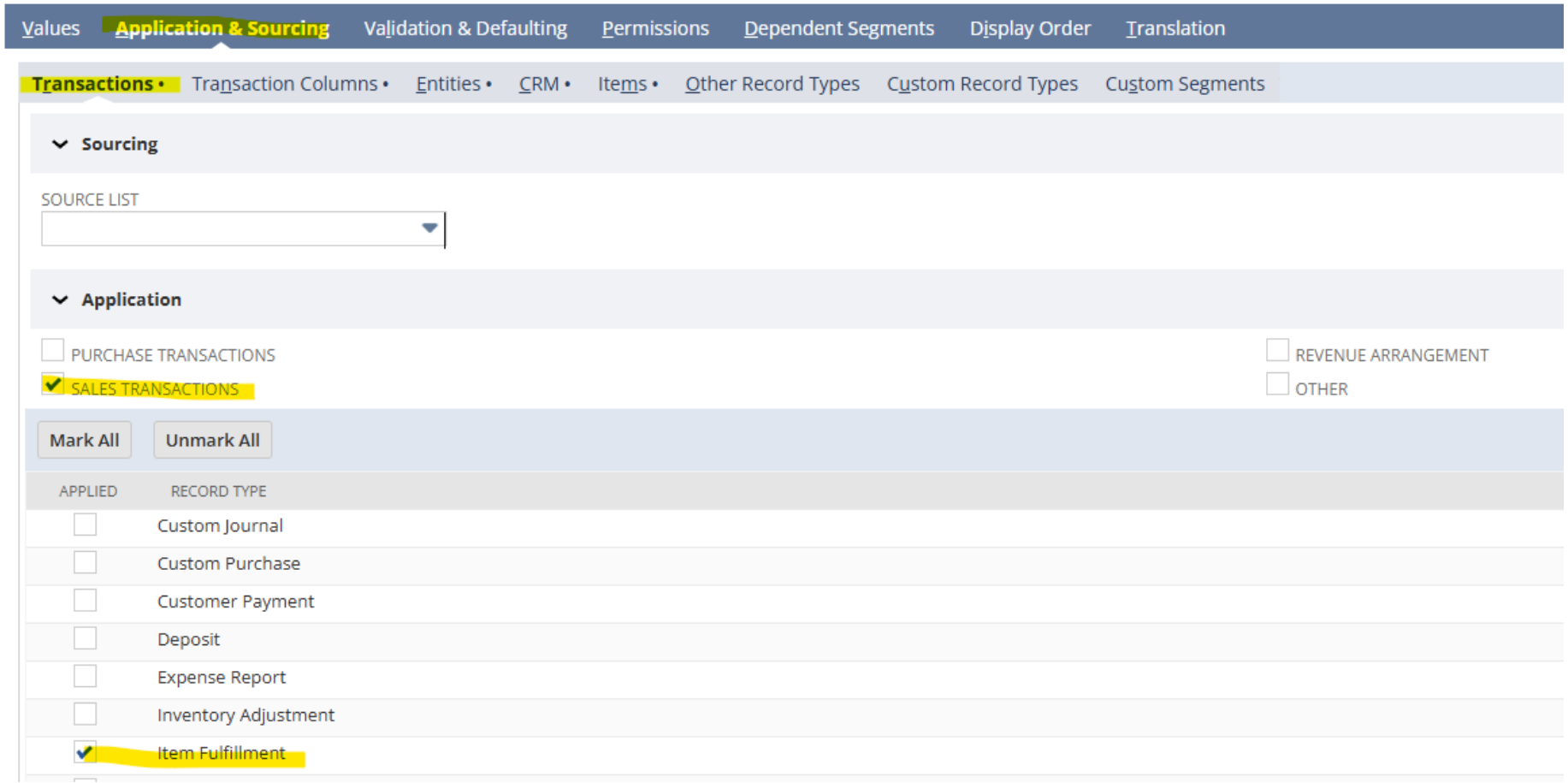
#1 Configuration – Create Custom Segment Continued

- To create custom segment navigate to Customization>Lists, Records, & Fields>Custom Segments>New



#1 Configuration – Create Custom Segment Continued

- To create custom segment navigate to Customization>Lists, Records, & Fields>Custom Segments>New



- Save the Record

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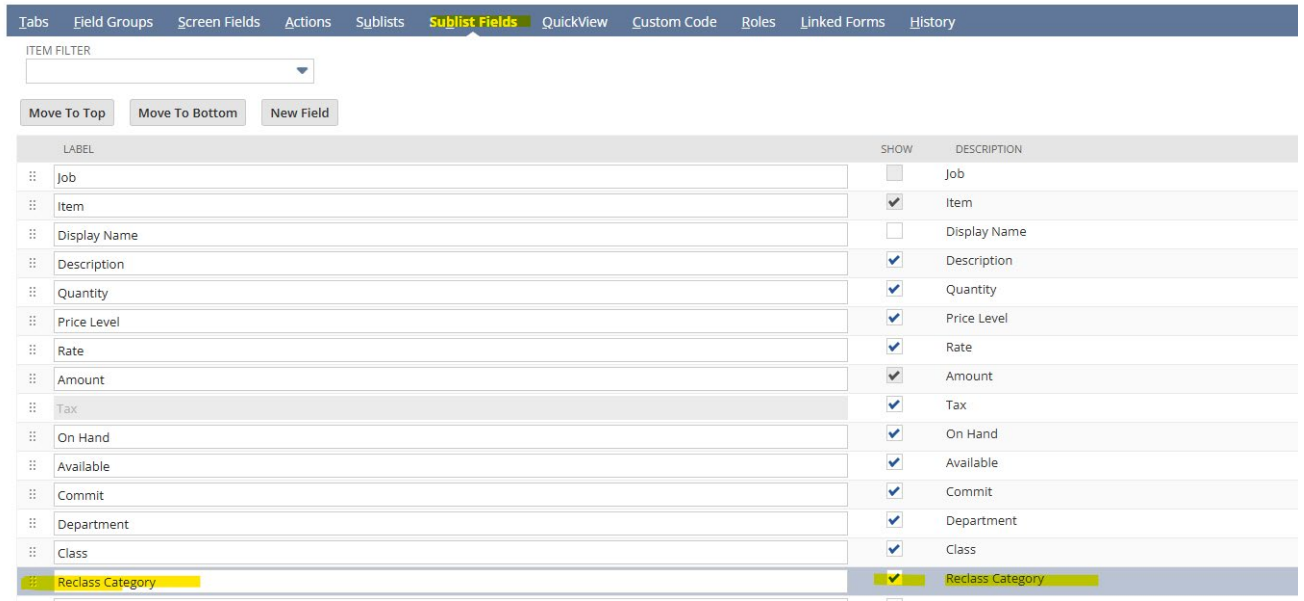
2. Configuration>Edit Sales Order and IF Forms to Show Custom Segment Created

#2 Edit Sales Order and IF Forms to Show Custom Segment

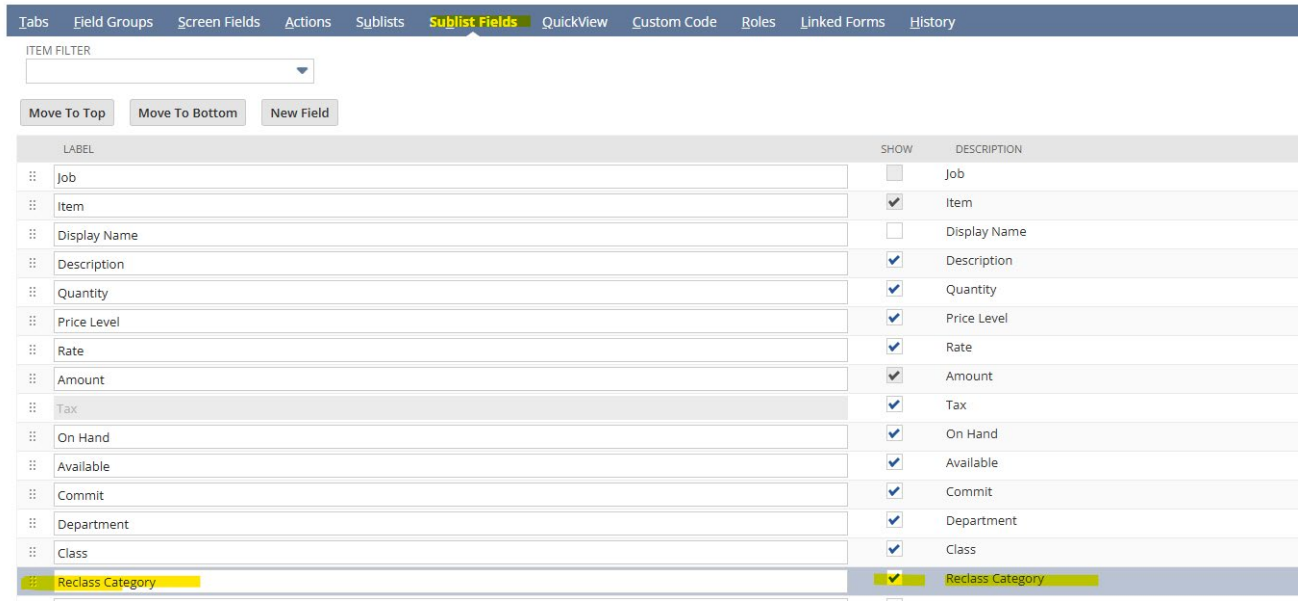
- Next we want to edit our preferred SO and IF Forms so can get the Custom Segment we created to show up
  - Navigate to Customization>Forms>Transaction Forms
    - Find Your preferred Sales Order form in the List
      - SS SVCS PRM - Sales Order
      - Edit>Sublist Fields
      - Reclass Category is at bottom. Check box to show and drag up next to native class field



    - Save the Form

#2 Edit Sales Order and IF Forms to Show Custom Segment - Continued

- Next we want to edit our preferred SO and IF Forms so can get the Custom Segment we created to show up
  - Navigate to Customization>Forms>Transaction Forms
    - Find Your preferred Item Fulfilment form in the List
      - SS SVCS PRM - Item Fulfillment
      - Edit>Sublist Fields
      - Reclass Category is at bottom. Check box to show and drag up next to native class field



- Save the Form

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3. Create Custom Record Mapping

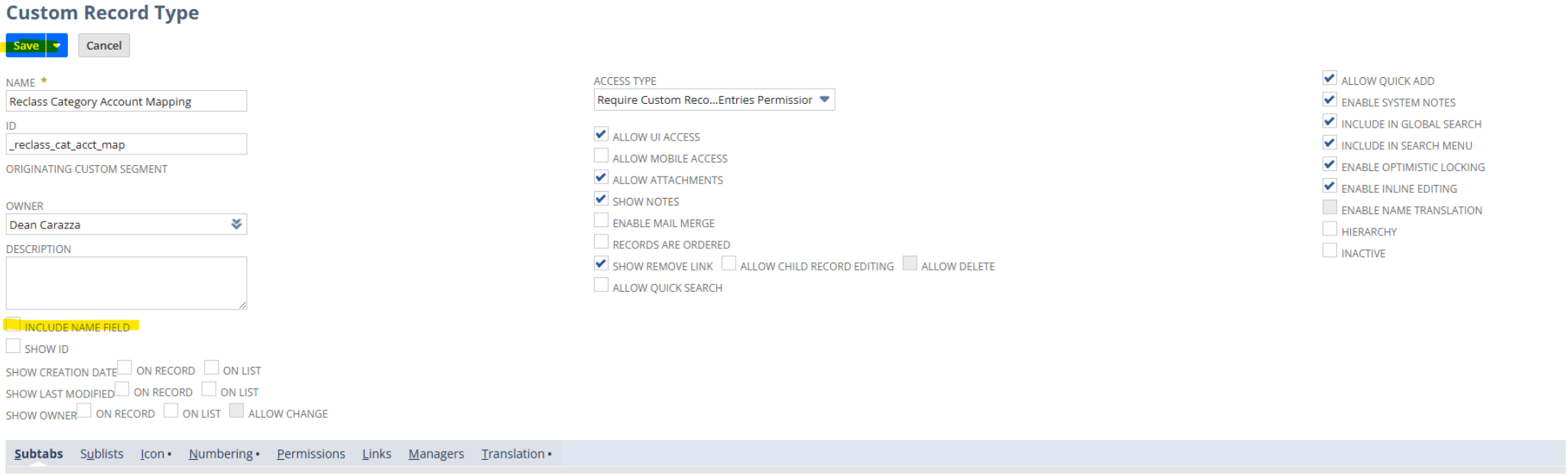
#3 Create Custom Record Mapping

- We want to make create a Custom Record Mapping that can map Reclass Category to which From and TO GL Accounts should be used for GL Plugin Script to use as basis for Reclass
  - To create the custom record navigate to Customization>Lists, Records, & Fields>Record Types>New
    - Name = Reclass Category Account Mapping
    - ID = _reclass_cat_acct_map - *Note ID needs to be taken and match exactly to script to work*

```
    const getMapping = () => {
        const output = {};

        search.create({
            type: 'customrecord_reclass_cat_acct_map',
            filters: [
                ['isinactive', search.Operator.IS, 'F']
            ],
            columns: [
                'custrecord_reclass_category',
                'custrecord_from_account',
                'custrecord_to_account'
            ]
        }).run().each(r => {
            log.debug('map.result', r);

            const category = r.getValue({ name: 'custrecord_reclass_category' });

            output[category] = {
                fromAccount: r.getValue({ name: 'custrecord_from_account' }),
                toAccount: r.getValue({ name: 'custrecord_to_account' })
            };

            return true;
        });

        return output;
    };

    return {
        customizeGlImpact
    };

});
```

#3 Create Custom Record Mapping - Continued

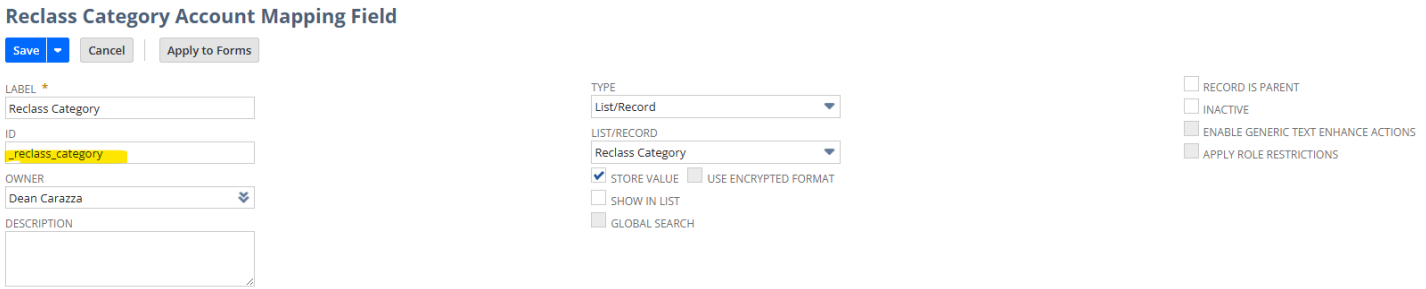
- We want to make create a Custom Record Mapping that can map Reclass Category to which From and TO GL Accounts should be used for GL Plugin Script to use as basis for Reclass
  - Uncheck the Include Name Field and Save the Record



#3 Create Custom Record Mapping - Continued

- We want to make create a Custom Record Mapping that can map Reclass Category to which From and TO GL Accounts should be used for GL Plugin Script to use as basis for Reclass
  - Next
    - Navigate to the Custom Record in the List – should be in Alphabetical order in list look for Reclass Category Account Mapping
    - Now we can add the following three fields for our mapping
      - Label = Reclass Category
        - Type = List Record
        - List/Record = Reclass Category
        - ID = _reclass_category *– Note needs to be taken from script and match exactly to work*

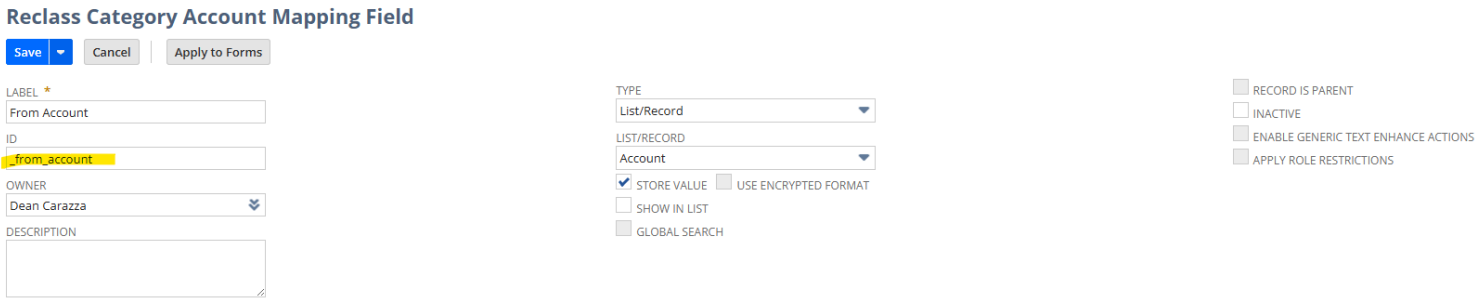
```
    };

    const getMapping = () => {
        const output = {};

        search.create({
            type: 'customrecord_reclass_cat_acct_map',
            filters: [
                ['isinactive', search.Operator.IS, 'F']
            ],
            columns: [
                'custrecord_reclass_category',
                'custrecord_from_account',
                'custrecord_to_account'
            ]
        }).run().each(r => {
            log.debug('map.result', r);

            const category = r.getValue({ name: 'custrecord_reclass_category' });

            output[category] = {
                fromAccount: r.getValue({ name: 'custrecord_from_account' }),
                toAccount: r.getValue({ name: 'custrecord_to_account' })
            };

            return true;
        });

        return output;
    };

    return {
        customizeGlImpact
    };

});
```



#3 Create Custom Record Mapping - Continued

- We want to make create a Custom Record Mapping that can map Reclass Category to which From and TO GL Accounts should be used for GL Plugin Script to use as basis for Reclass
  - Next
    - Navigate to the Custom Record in the List – should be in Alphabetical order in list look for Reclass Category Account Mapping
    - Now we can add the following three fields for our mapping
      - Label = From Account
        - Type = List Record
        - List/Record = Account
        - ID = _from_account *– Note needs to be taken from script and match exactly to work*

```
const getMapping = () => {
    const output = {};

    search.create({
        type: 'customrecord_reclass_cat_acct_map',
        filters: [
            ['isinactive', search.Operator.IS, 'F']
        ],
        columns: [
            'custrecord_reclass_category',
            'custrecord_from_account',
            'custrecord_to_account'
        ]
    }).run().each(r => {
        log.debug('map.result', r);

        const category = r.getValue({ name: 'custrecord_reclass_category' });

        output[category] = {
            fromAccount: r.getValue({ name: 'custrecord_from_account' }),
            toAccount: r.getValue({ name: 'custrecord_to_account' })
        };

        return true;
    });

    return output;
};

return {
    customizeGlImpact
};

);
```



#3 Create Custom Record Mapping - Continued

- We want to make create a Custom Record Mapping that can map Reclass Category to which From and TO GL Accounts should be used for GL Plugin Script to use as basis for Reclass
  - Next
    - Navigate to the Custom Record in the List – should be in Alphabetical order in list look for Reclass Category Account Mapping
    - Now we can add the following three fields for our mapping
      - Label = To Account
        - Type = List Record
        - List/Record = Account
        - ID = _to_account *– Note needs to be taken from script and match exactly to work*

```
const getMapping = () => {
    const output = {};

    search.create({
        type: 'customrecord_reclass_cat_acct_map',
        filters: [
            ['isinactive', search.Operator.IS, 'F']
        ],
        columns: [
            'custrecord_reclass_category',
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        output[category] = {
            fromAccount: r.getValue({ name: 'custrecord_from_account' }),
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        return true;
    });

    return output;
};

return {
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};

});
```
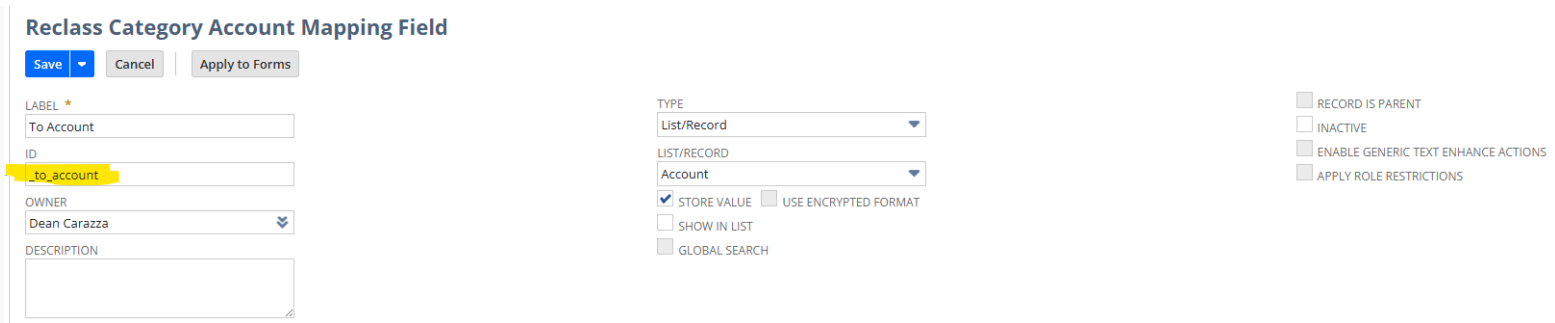
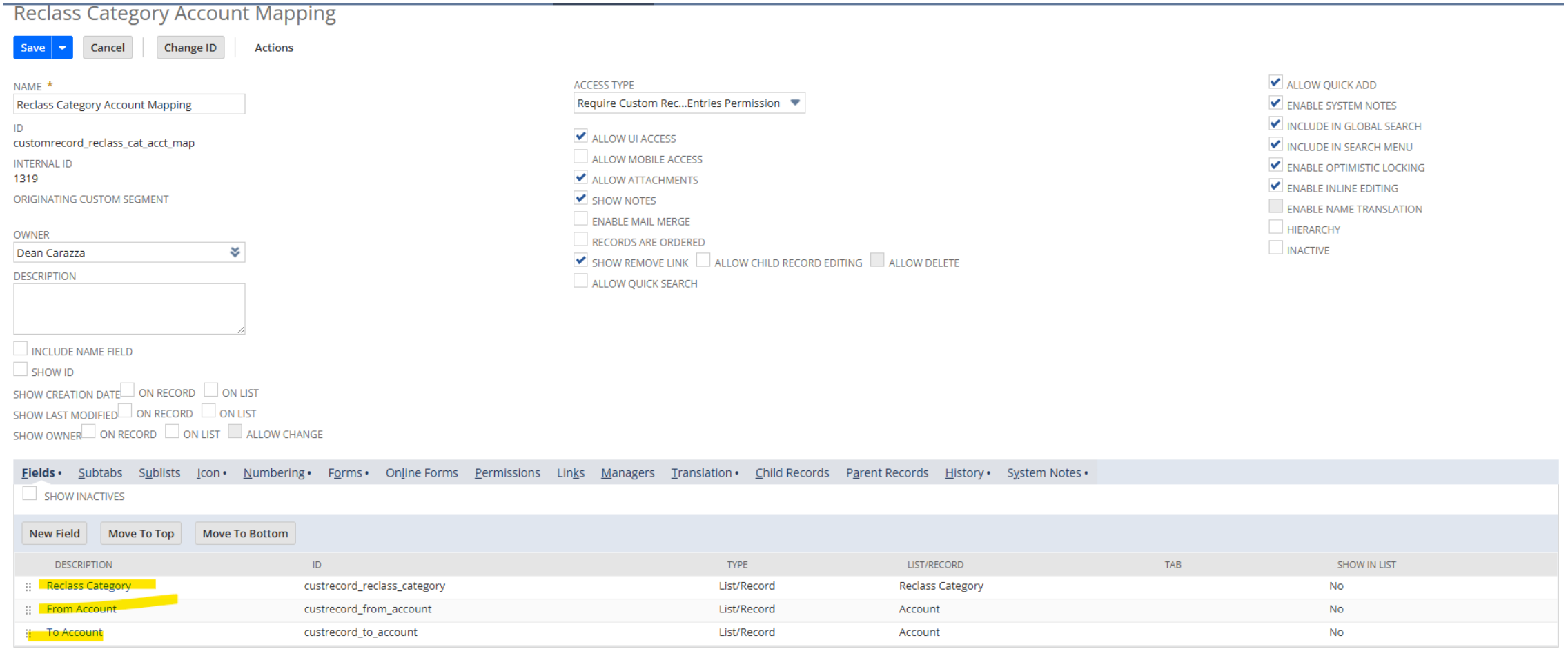



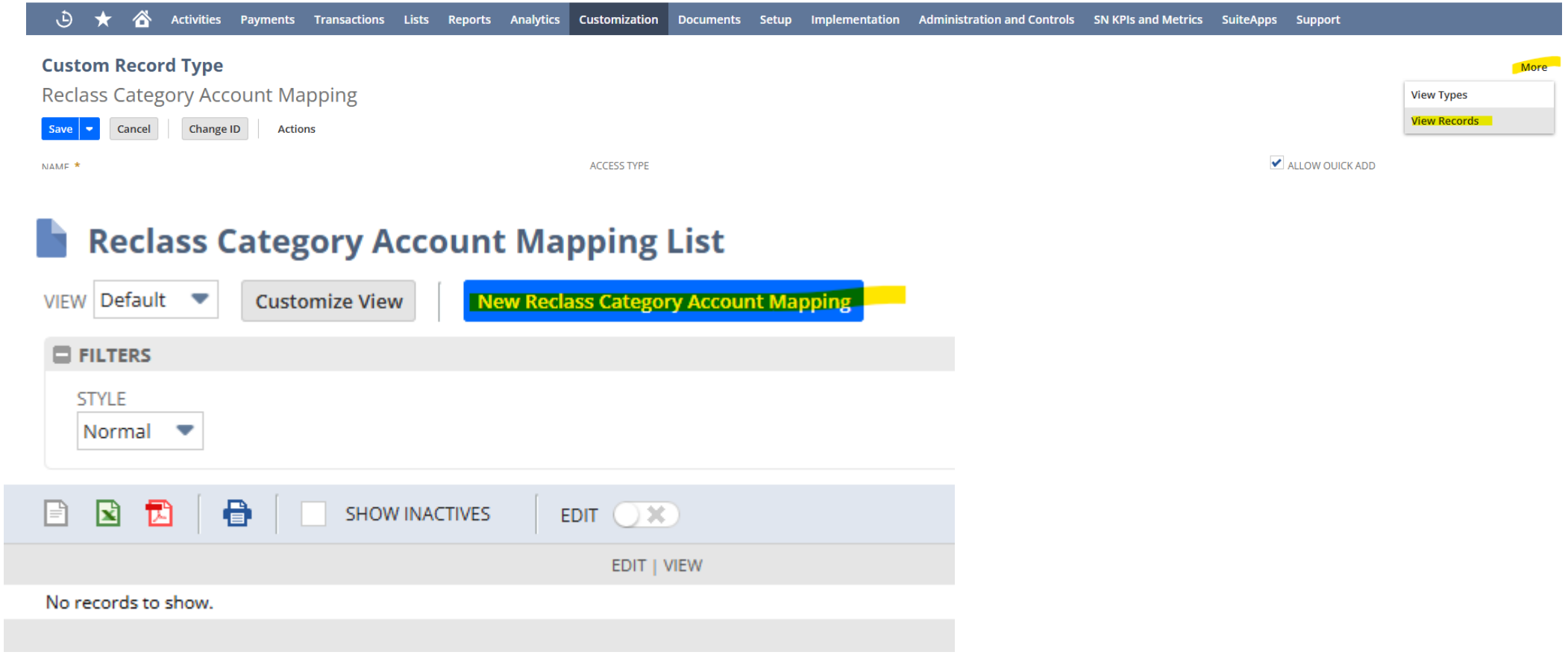
#3 Create Custom Record Mapping - Continued

- We want to make create a Custom Record Mapping that can map Reclass Category to which From and TO GL Accounts should be used for GL Plugin Script to use as basis for Reclass



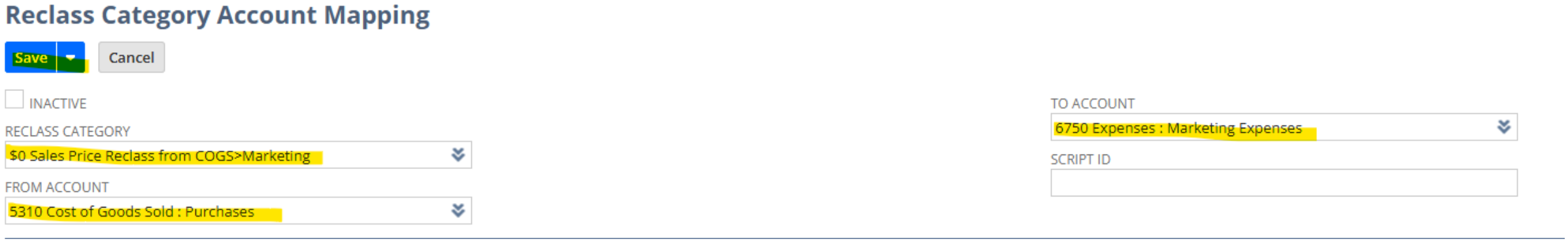
#3 Create Custom Record Mapping - Continued

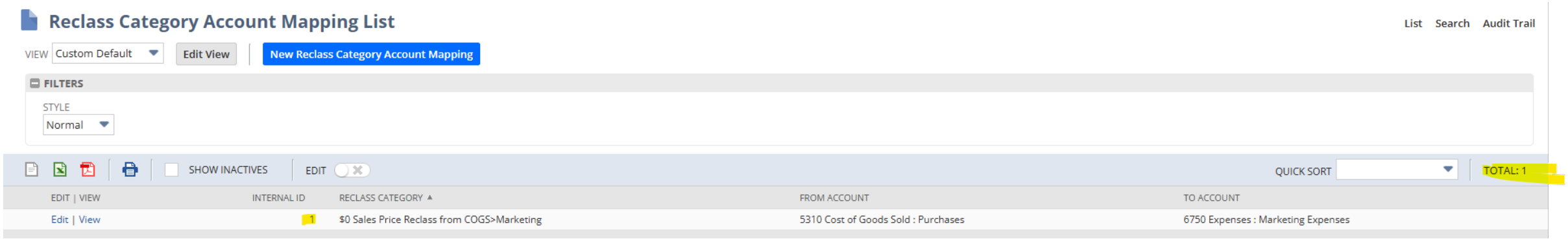
- We want to make create a Custom Record Mapping that can map Reclass Category to which From and TO GL Accounts should be used for GL Plugin Script to use as basis for Reclass
  - Now that we have created our three fields we can create a mapping record. To create go to More>View Records>New Class Category Account Mapping Button



#3 Create Custom Record Mapping - Continued

- We want to make create a Custom Record Mapping that can map Reclass Category to which From and TO GL Accounts should be used for GL Plugin Script to use as basis for Reclass





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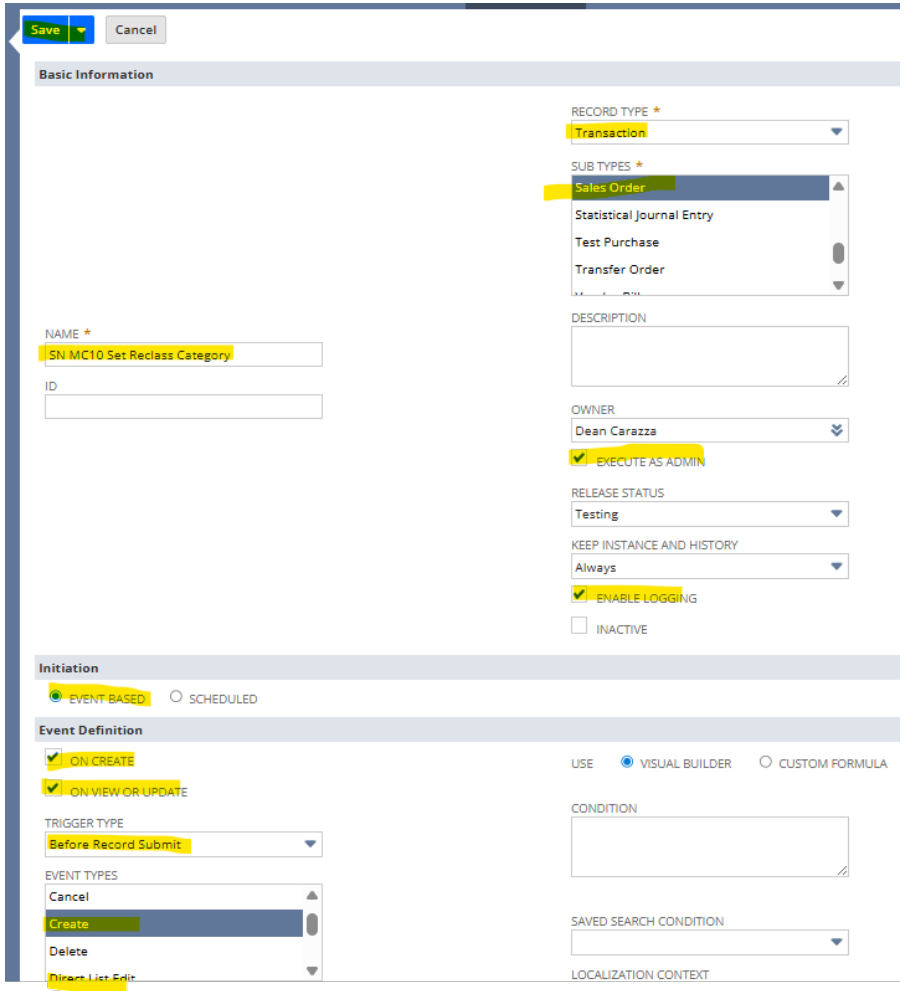
4. Create Workflow to Set Reclass Category based on Condition

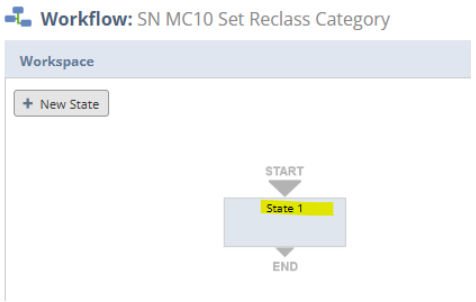
#4 Create Workflow to Set Reclass Category

- We want to create a workflow that can automate setting the Reclass Category on Transactions when meet our reclass condition, in our case when Sales Price = $0.
- To Create workflow navigate to Customization>Workflow>Workflows>New
  - Name - SN MC10 Set Reclass Category
  - Record Type = Transaction
  - Sub Type = Sales Order
  - Initiation = Event Based
  - Event Definition
    - On Create
    - On view or Update
    - Trigger Type = Before Record Submit
    - Event Types
      - Create
      - Edit
  - Save

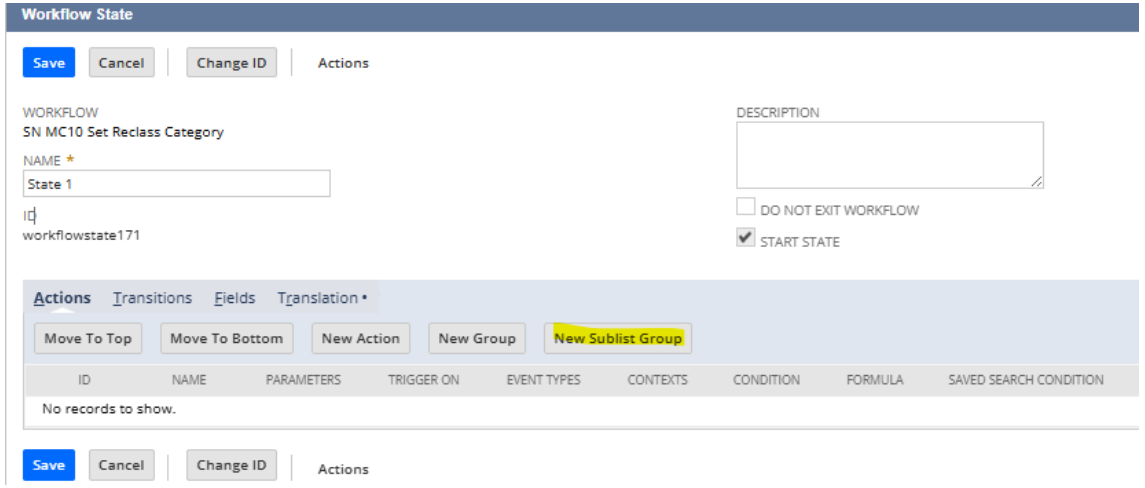


#4 Create Workflow to Set Reclass Category - Continued

- Once have created Workflow next we can add our State
  - Double click on the State Box

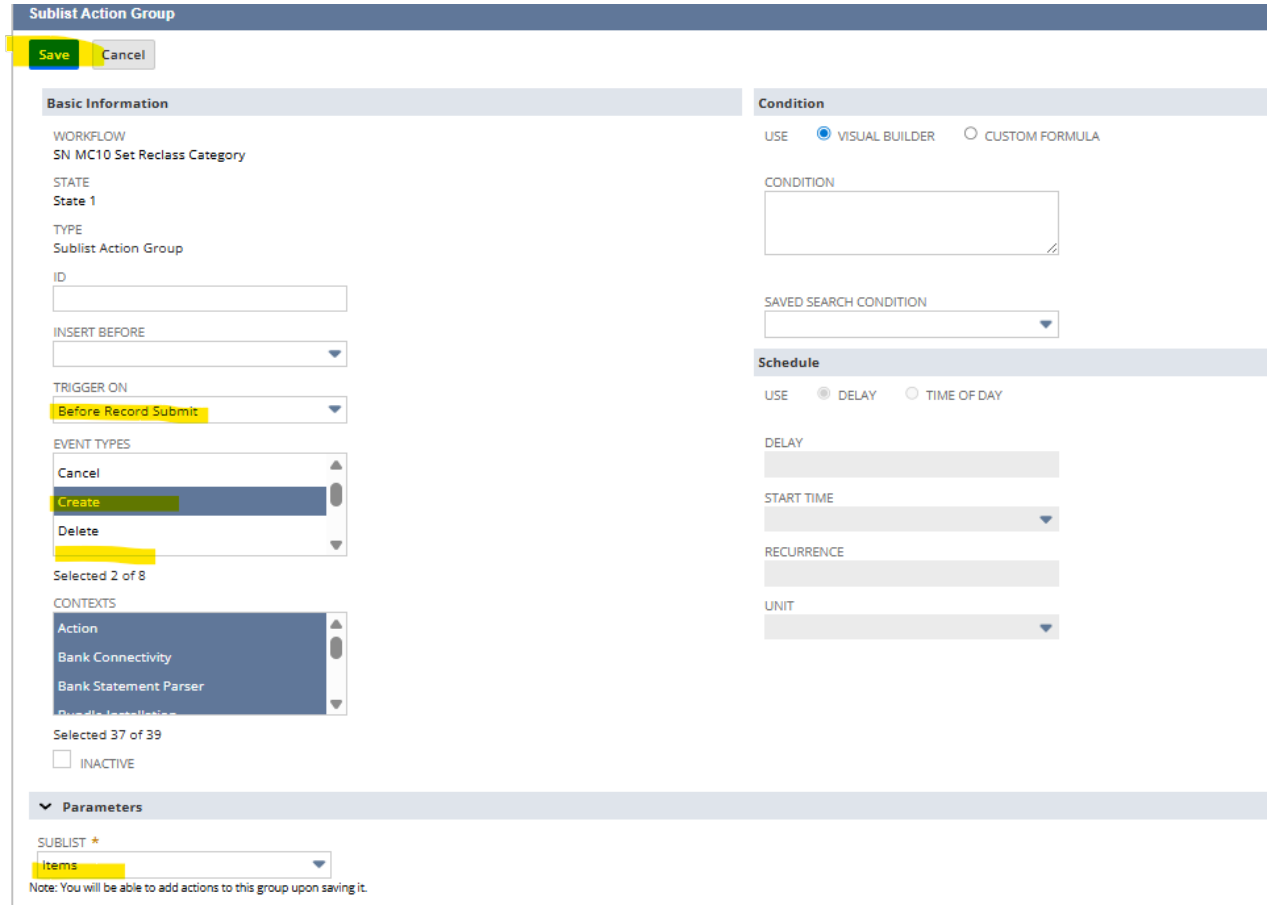


  - Since we want to access the Items Sublist on a Sales Order since will be looking for Sales Order Item lines where sales price = $0, click on the New Sublist Group Button



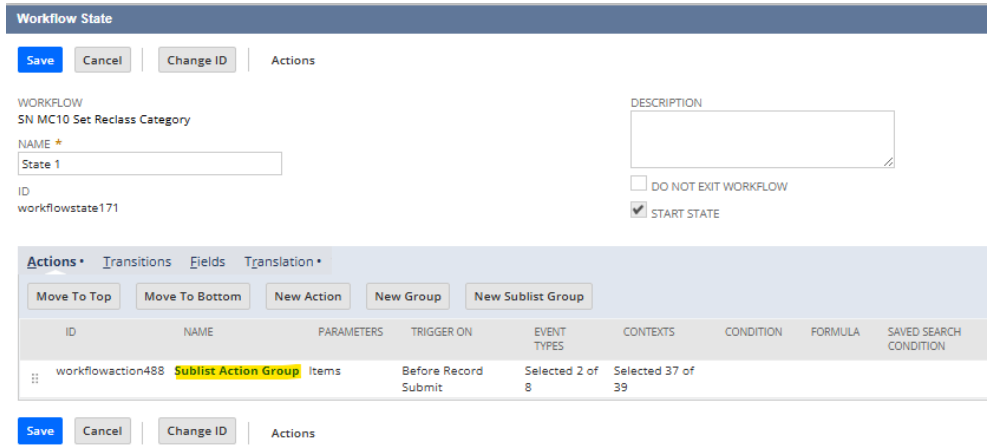
#4 Create Workflow to Set Reclass Category - Continued

- Once have created Workflow next we can add our State
  - Trigger Type = Before Record Submit
  - Event Types
    - Create
    - Edit
  - Sublist
    - Items
- Save

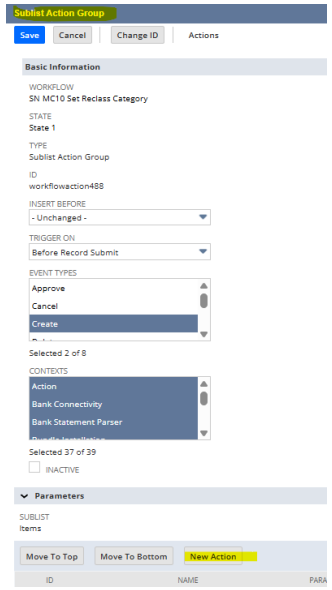


#4 Create Workflow to Set Reclass Category - Continued

- Next, double click on the Sublist Group we Just Created so we can add are action

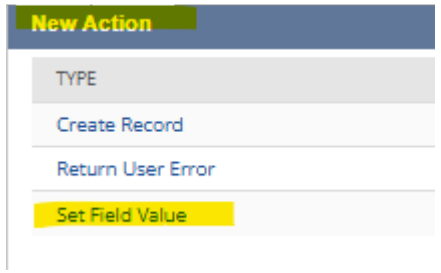


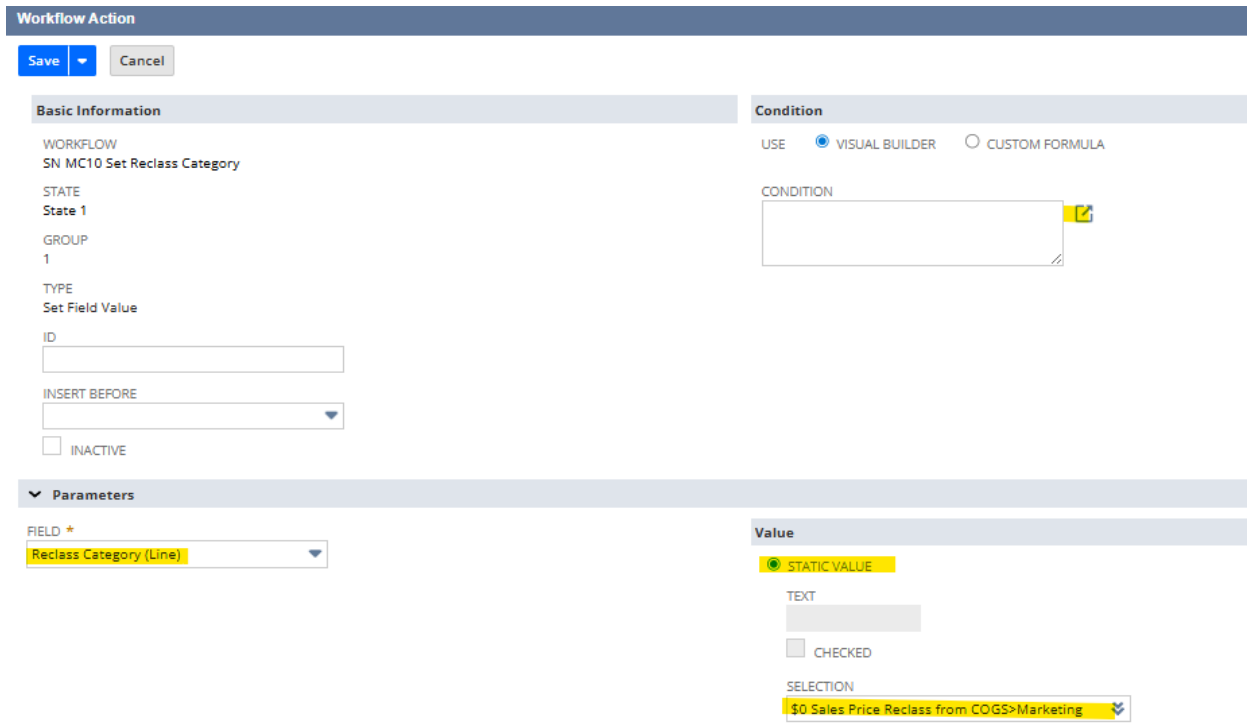
- Click on New Action

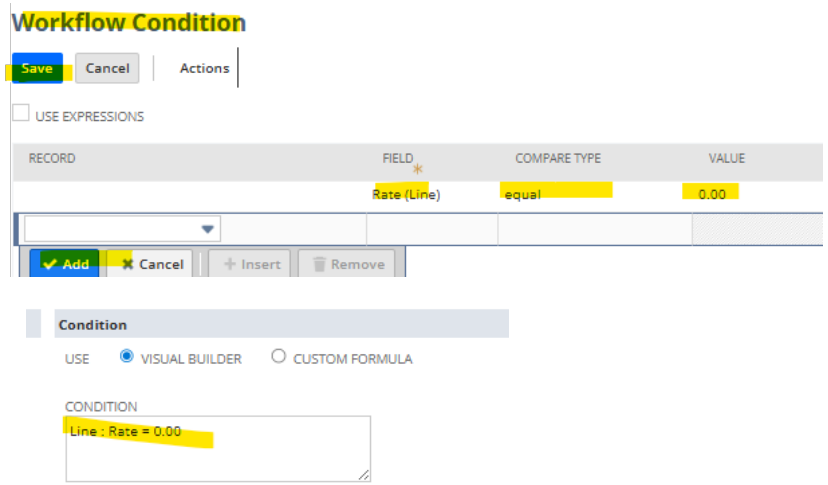


#4 Create Workflow to Set Reclass Category - Continued

- Select Set Field Value as the Action



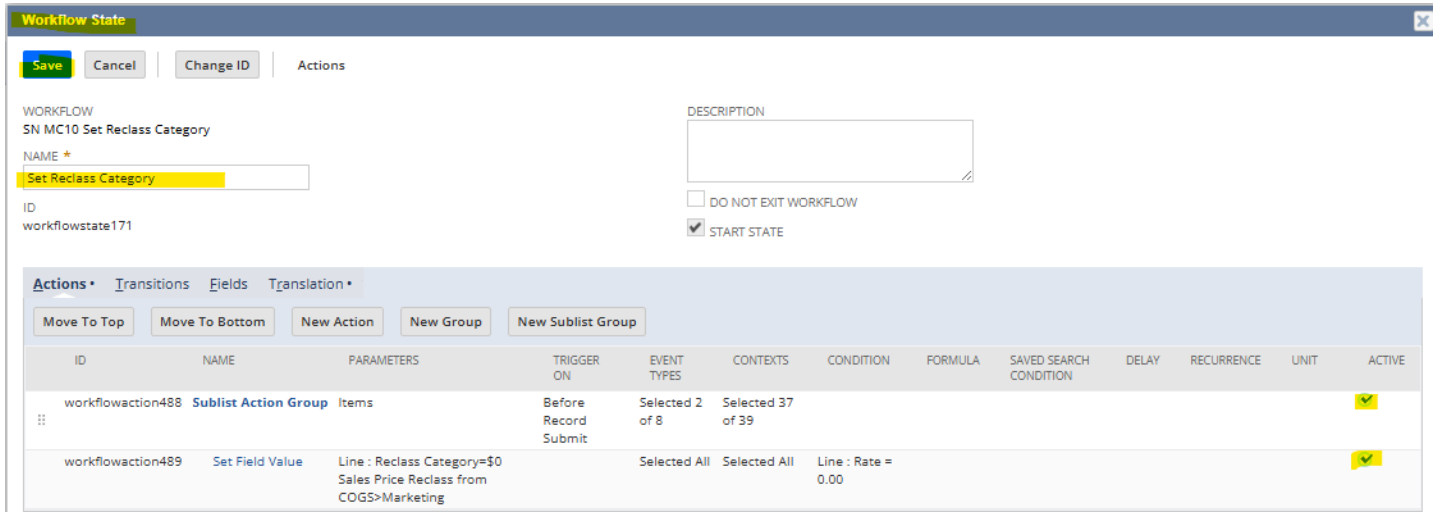


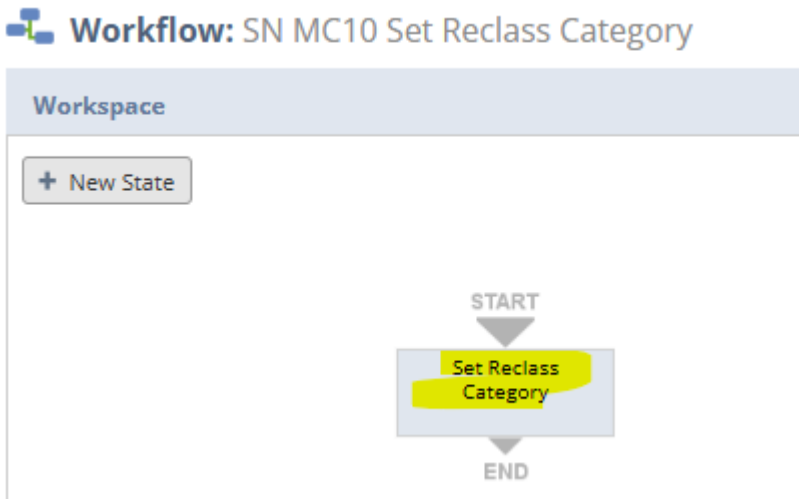


- Save

#4 Create Workflow to Set Reclass Category - Continued

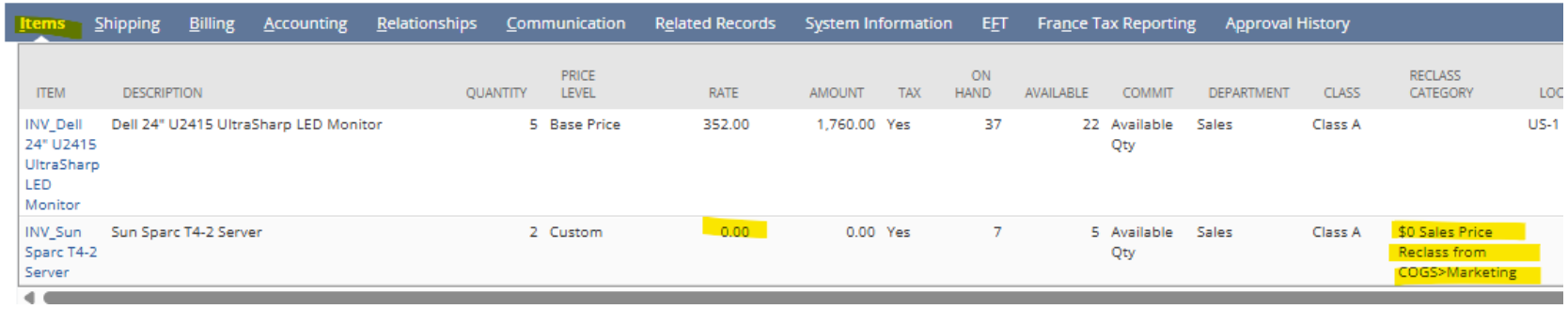
- Rename the State Field = Set Reclass Category
  - Save





#4 Create Workflow to Set Reclass Category - Continued

- Now that we have created our workflow. We can do a quick test to ensure that it is auto setting the reclass category on Sales Order Lines if Sales Price = $0
- To Test make sure to put the workflow in View Mode
- Create Sales Order
  - Customer = Renner Inc
  - Item 1 = INV_Dell 24" U2415 UltraSharp LED Monitor|Qty = 5|Location = US 1
  - Item 2 = INV_Sun Sparc T4–2 Server|Qty = 2 – Sales Price $0|Location = US 1
- Save the Sales Order
- Expectation is that should have set the Reclass Category for second item line to $0 Sales Price Reclass from COGS>Marketing



Items | Shipping | Billing | Accounting | Relationships | Communication | Related Records | System Information | EFT | France Tax Reporting | Approval History

ITEM	DESCRIPTION	QUANTITY	PRICE LEVEL	RATE	AMOUNT	TAX	ON HAND	AVAILABLE	COMMIT	DEPARTMENT	CLASS	RECLASS CATEGORY	LOC
INV_Dell 24" U2415 UltraSharp LED Monitor	Dell 24" U2415 UltraSharp LED Monitor	5	Base Price	352.00	1,760.00	Yes	37	22	Available Qty	Sales	Class A		US-1
INV_Sun Sparc T4-2 Server	Sun Sparc T4-2 Server	2	Custom	0.00	0.00	Yes	7	5	Available Qty	Sales	Class A	$0 Sales Price Reclass from COGS>Marketing	

- We will approve the Sales Order – Transactions>Sales>Approve Sales Order Page – Select our SO and Submit for Approval

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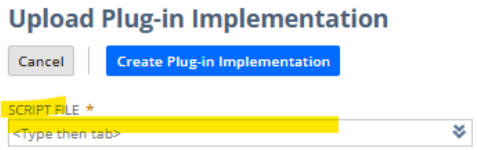
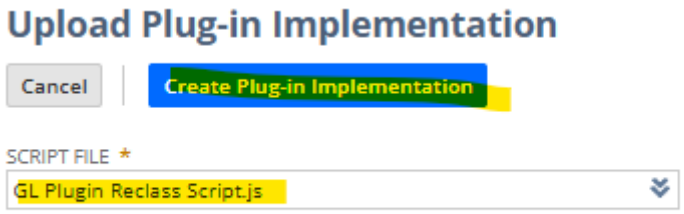
1. Development>GL Plugin Script

1. Create GL Plugin Script

- Now that we have finished testing are workflow, approving Sales Order, and completing are functional configuration, we can proceed to creating our GL Plugin Script
  - Navigate to Customization>Plug-Ins>Plug-in Implementations>New
  - It wants the script file

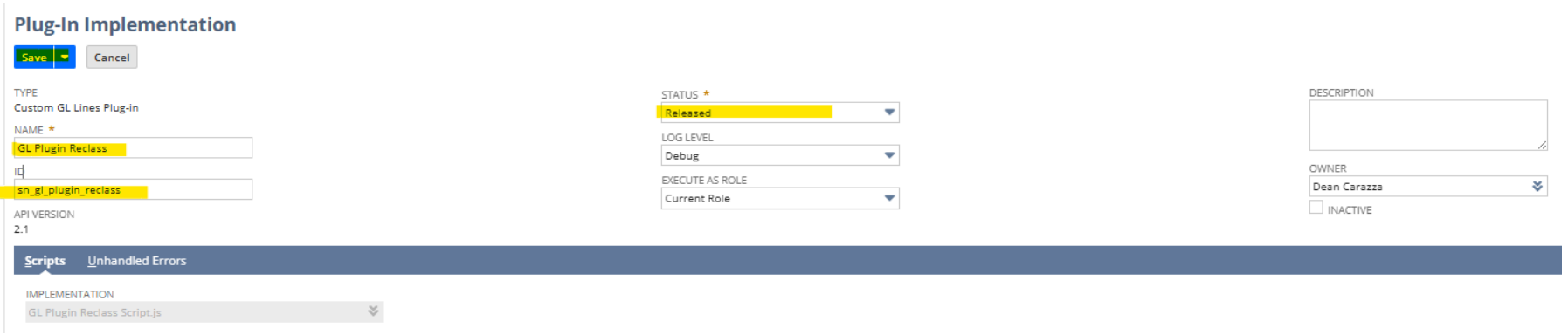


  - If you would like the Script File – help follow on LN using link below and will send you the file
    - https://www.linkedin.com/smart-links/AQHEWXvKH6Nk_w



1. Create GL Plugin Script - Continued

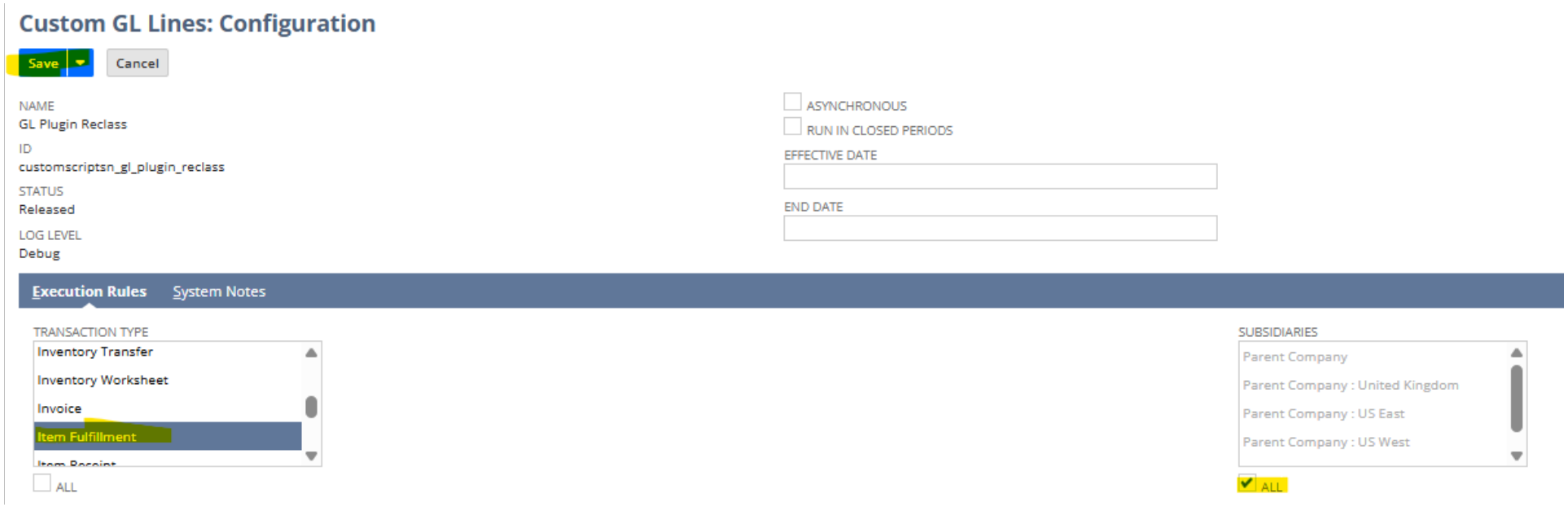
- Create the Script
  - Name = GL Plugin Reclass
  - ID = sn_gl_plugin_reclass



  - Configure

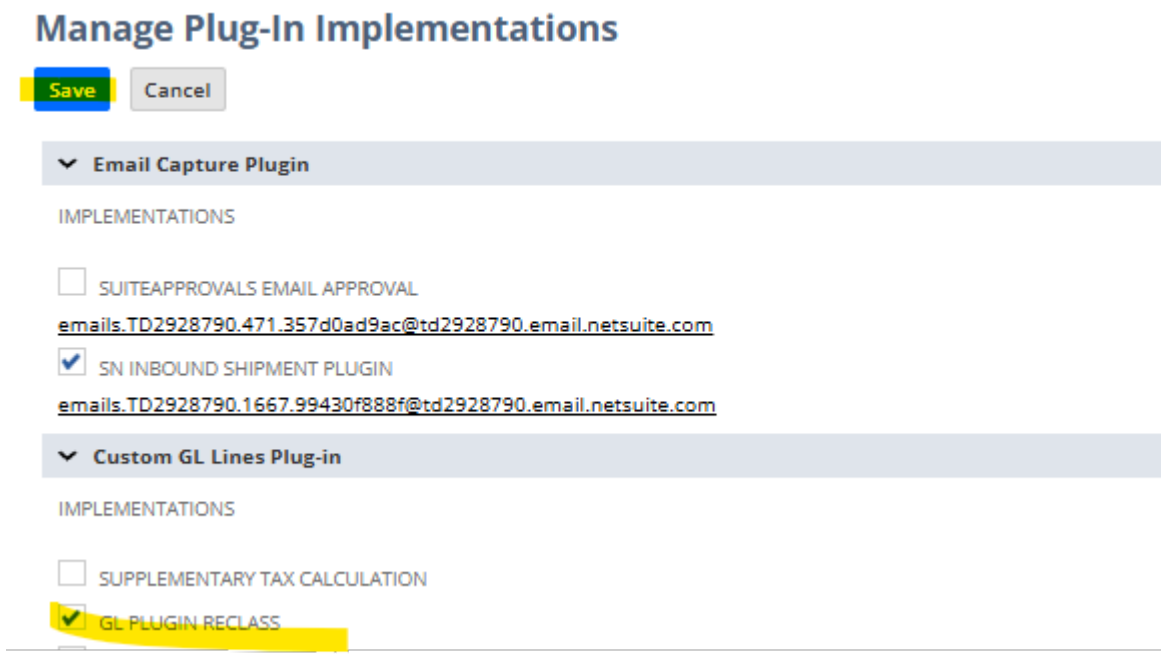
1. Create GL Plugin Script - Continued

- Configure the Script



1. Create GL Plugin Script - Continued

- Now that we have created the GL Plugin Implementation Script, we just need to enable it in the Manage Plugin Implementations page by checking the box
  - Check the box and Save



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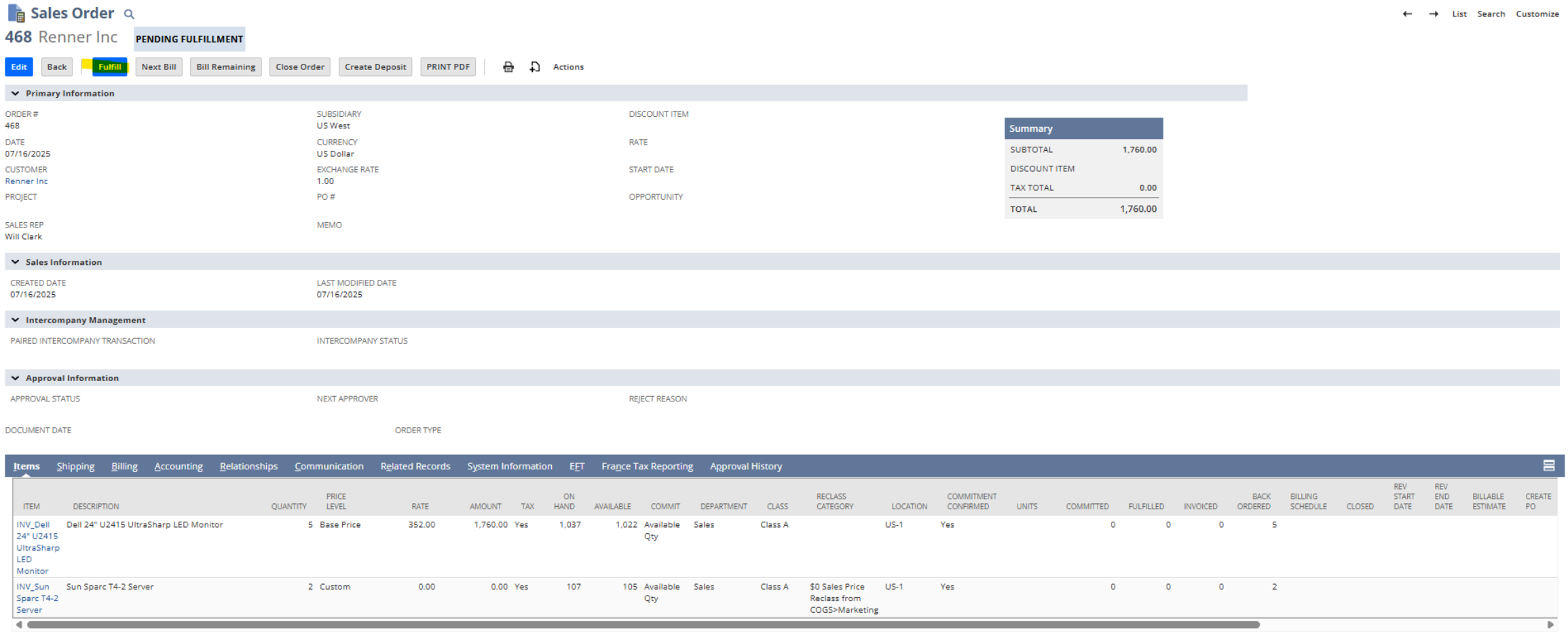
Testing

Testing

- Now that we have finished our Configuration and Development steps, we are ready to test the solution
  - All we need to do is test creating an Item Fulfilment for the Sales Order we created and approved in previous steps and view the GL Impact of the Item Fulfilment to see if gets reclassed



Sales Order

468 Renner Inc PENDING FULFILLMENT

List Search Customize

Edit Back Fulfill Next Bill Bill Remaining Close Order Create Deposit PRINT PDF Actions

Primary Information

ORDER # 468
DATE 07/16/2025
CUSTOMER Renner Inc
PROJECT
SALES REP Will Clark
SUBSIDIARY US West
CURRENCY US Dollar
EXCHANGE RATE 1.00
PO #
MEMO
DISCOUNT ITEM
RATE
START DATE
OPPORTUNITY

Summary	
SUBTOTAL	1,760.00
DISCOUNT ITEM	
TAX TOTAL	0.00
TOTAL	1,760.00

Sales Information

CREATED DATE 07/16/2025
LAST MODIFIED DATE 07/16/2025

Intercompany Management

PAIRED INTERCOMPANY TRANSACTION
INTERCOMPANY STATUS

Approval Information

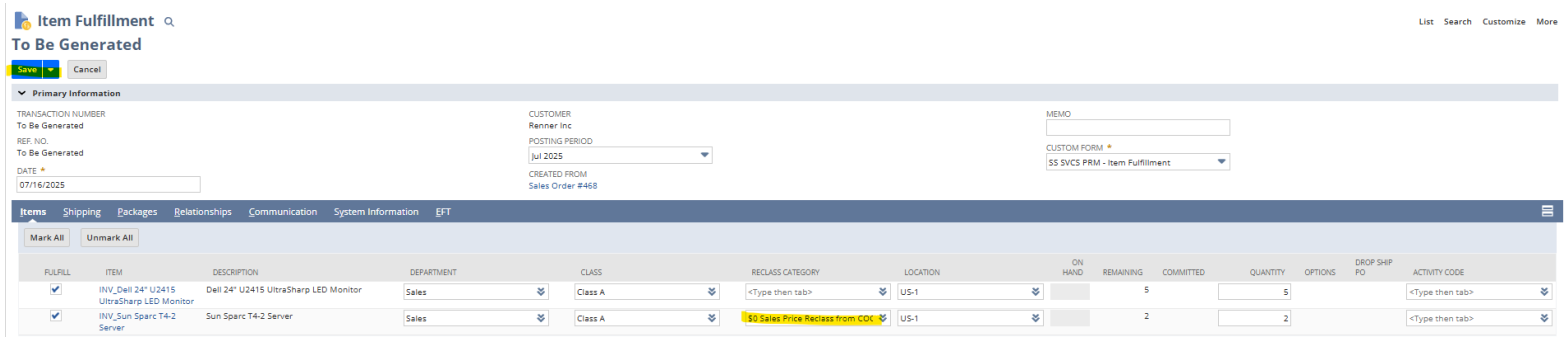
APPROVAL STATUS
NEXT APPROVER
REJECT REASON
DOCUMENT DATE
ORDER TYPE

Items Shipping Billing Accounting Relationships Communication Related Records System Information EFT France Tax Reporting Approval History

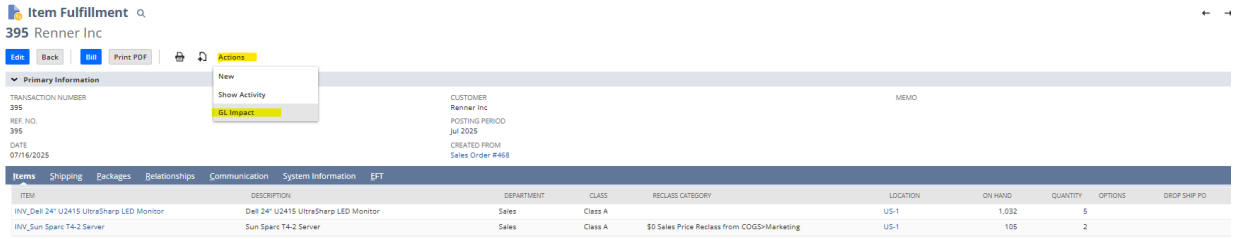
ITEM	DESCRIPTION	QUANTITY	PRICE LEVEL	RATE	AMOUNT	TAX	ON HAND	AVAILABLE	COMMIT	DEPARTMENT	CLASS	RECLASS CATEGORY	LOCATION	COMMITMENT CONFIRMED	UNITS	COMMITTED	FULFILLED	INVOICED	BACK ORDERED	BILLING SCHEDULE	CLOSED	REV START DATE	REV END DATE	BILLABLE ESTIMATE	CREATE PO
INV_Dell 24" U2415 UltraSharp LED Monitor	Dell 24" U2415 UltraSharp LED Monitor	5	Base Price	352.00	1,760.00	Yes	1,037	1,022	Available Qty	Sales	Class A		US-1	Yes		0	0	0	5						
INV_Sun Sparc T4-2 Server	Sun Sparc T4-2 Server	2	Custom	0.00	0.00	Yes	107	105	Available Qty	Sales	Class A	$0 Sales Price Reclass from COGS>Marketing	US-1	Yes		0	0	0	2						

Testing

- Now that we have finished our Configuration and Development steps, we are ready to test the solution
  - All we need to do is test creating an Item Fulfilment for the Sales Order we created and approved in previous steps and view the GL Impact of the Item Fulfilment to see if gets reclassed



  - Review GL Impact



GL Impact

ACCOUNT	AMOUNT (DEBIT)	AMOUNT (CREDIT)	POSTING	MEMO	NAME	SUBSIDIARY	DEPARTMENT	CLASS	LOCATION	CUSTOM SCRIPT	ACTIVITY CODE	BUSINESS CHANNEL	RECLASS CATEGORY
5310 Cost of Goods Sold : Purchases	$1,150.00		Yes	Cost of Sales	Renner Inc	Parent Company : US West	Sales	Class A	US-1				
1210 Inventory : Inventory in Stock		$1,150.00	Yes	Cost of Sales	Renner Inc	Parent Company : US West	Sales	Class A	US-1				
5310 Cost of Goods Sold : Purchases	$9,274.00		Yes	Cost of Sales	Renner Inc	Parent Company : US West	Sales	Class A	US-1				$0 Sales Price Reclass from COGS>Marketing
1210 Inventory : Inventory in Stock		$9,274.00	Yes	Cost of Sales	Renner Inc	Parent Company : US West	Sales	Class A	US-1				$0 Sales Price Reclass from COGS>Marketing
5310 Cost of Goods Sold : Purchases		$9,274.00	Yes	Reverse	Renner Inc	Parent Company : US West	Sales	Class A	US-1	GL Plugin Reclass			$0 Sales Price Reclass from COGS>Marketing
6750 Expenses : Marketing Expenses	$9,274.00		Yes	Reclass	Renner Inc	Parent Company : US West	Sales	Class A	US-1	GL Plugin Reclass			$0 Sales Price Reclass from COGS>Marketing

Testing

- Now that we have finished our Configuration and Development steps, we are ready to test the solution
  - Since we used a Custom Segment for Reclass Category, can even run an Income Statement to See the Reclass Category and which transactions were reclassed

Income Statement

View Detail

FINANCIAL ROW	$0 SALES PRICE RECLASS FROM COGS>MARKETING Amount	UNASSIGNED Amount	TOTAL Amount
Ordinary Income/Expense			
Income	$0.00	$14,820,511.61	$14,820,511.61
Cost Of Sales	$0.00	$7,754,459.03	$7,754,459.03
Gross Profit	$0.00	$7,066,052.58	$7,066,052.58
Expense			
6000 - Expenses			
6050 - Selling Expenses	$0.00	$396,649.64	$396,649.64
6100 - G&A Expenses	$0.00	$5,417,870.00	$5,417,870.00
6750 - Marketing Expenses			
6750 - Marketing Expenses	$9,274.00	$9,274.00	$18,548.00
6751 - Digital Advertising	$0.00	$81,351.37	$81,351.37
6752 - Design	$0.00	$42,935.39	$42,935.39
6753 - Digital Marketing Agency	$0.00	$36,156.16	$36,156.16
6754 - Direct Marketing	$0.00	$22,823.56	$22,823.56
6755 - Google Marketing	$0.00	$45,737.50	$45,737.50
6756 - Market Research Expenses	$0.00	$39,376.90	$39,376.90
6757 - Marketing Events	$0.00	$72,312.26	$72,312.26
6758 - Promotional Product	$0.00	$21,829.30	$21,829.30
6759 - Public Relations	$0.00	$18,078.08	$18,078.08
6760 - Social Media Marketing	$0.00	$47,454.92	$47,454.92
6761 - Sponsorship	$0.00	$33,896.42	$33,896.42
Total - 6750 - Marketing Expenses	$9,274.00	$471,225.86	$480,499.86
Total - 6000 - Expenses	$9,274.00	$6,285,745.49	$6,295,019.49
6780 - Direct Labor	$0.00	$23,420.00	$23,420.00
Total - Expense	$9,274.00	$6,309,165.49	$6,318,439.49
Net Ordinary Income	($9,274.00)	$756,887.09	$747,613.09
Other Income and Expenses			
Other Income			
7000 - Other Income			
7100 - Interest Income	$0.00	$100.00	$100.00
Total - 7000 - Other Income	$0.00	$100.00	$100.00
Total - Other Income	$0.00	$100.00	$100.00

DATE this year FROM 01/01/2025 TO 12/31/2025 SUBSIDIARY CONTEXT Parent Company (Consolidated) COLUMN Reclass Category (Custom)

Refresh Customize

Income Statement Detail

Back to Summary

FINANCIAL ROW	TYPE	DATE	DOCUMENT NUMBER	NAME	CLR	SPLIT	AMOUNT
Ordinary Income/Expense							
Gross Profit							$0.00
Expense							
6000 - Expenses							
6750 - Marketing Expenses							
	Item Fulfillment	07/16/2025	395	Renner Inc	F	-	$9,274.00
Total - 6750 - Marketing Expenses							$9,274.00
Total - 6000 - Expenses							$9,274.00
Total - Expense							$9,274.00
Net Ordinary Income							($9,274.00)
Net Income							($9,274.00)

Questions?

Next Steps

- Follow me and ScaleNorth on LinkedIn. Will be posting the materials from today on our LinkedIn
  - https://www.linkedin.com/mynetwork/discovery-see-all/?usecase=PEOPLE_FOLLOWS&followMember=dean-carazza-cpa-5b511553
- Group “NetSuite Made Easy”. Material from prior classes are posted out there as well. Can request to join group using link below
  - https://www.linkedin.com/groups/14571179/

- Will be hosting monthly with next one targeted to be Friday 8/22/25 12–1PM PST
  - Target Agenda:
  - NetSuite AI Overview/Use Cases
    - Build AI Prompt
    - Build a AI Chat BOT can put on NetSuite Home Dashboard

- 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
    - 714–350–6211
    - https://calendly.com/dcarazza-1

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NetSuite Consulting, Implementation and
Outsourced Accounting Services

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