

A background image showing a group of people in a meeting room. A man in a suit is standing and presenting to a group of people seated around a table. The room has a brick wall and large windows. The image is overlaid with a dark blue tint.

# ScaleNorth NetSuite MasterClass— Session 15-The NetSuite Red Flag Playbook: Spot Issues Before They Spot You

December 19, 2025

# Confidentiality Notice

The information in this document is confidential and proprietary to ScaleNorth, Inc.

This document must not be disclosed to any third party without prior written consent from ScaleNorth, Inc.

# 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

## ▲ Overview, Examples and Use Cases

- Financial Red Flags Review
- Operational Red Flags Review
- System Performance Review – Using APM Tool
- Audit Trails Review

## ▲ 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

[dcarazza@scalenorth.com](mailto:dcarazza@scalenorth.com)

714-350-6211

- ▲ 15 years of experience
- ▲ Public and Private Accounting
- ▲ 9 years NetSuite Experience
  - 2 Years Private/User - Assistant Controller for \$100M Distributor in Irvine
  - 7 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



275+  
Team  
Members



1,650+  
Years of Collective  
NetSuite ERP  
Experience

ORACLE NETSUITE  
BPO Partner



680+  
NetSuite  
Certifications  
Held by Staff



8.5+  
Avg Years of  
NetSuite  
Experience

ORACLE NETSUITE  
Solution Provider



\$2.5B+  
Annual Revenue  
Transactions  
Processed



57%  
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



**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.

# Financial Red Flags Review



# Financial Red Flags Review

- ▲ Negative Inventory
  - Transactions>Inventory>Review Negative Inventory
  - Inventory Valuation
  - Saved Search
- ▲ Account Balances Opposite Natural Debit/Credit
- ▲ NetSuite AI – Exception Management

# Financial Red Flags Review – Negative Inventory

- ▲ Negative Inventory

- Transactions>Inventory>Review Negative Inventory

# Financial Red Flags Review – Negative Inventory

## ▲ Negative Inventory

### - Inventory Valuation – Edit Columns

Report Builder **SN MC NEGATIVE INVENTORY VALUATION SUMMARY** [Download XML](#) [More](#)

**Edit Columns** Filters Sorting More Options

NAME \*  
SN MC Negative Inventory Valuation Summary

No items to show.

ADD FIELDS  
Add Formula Field

- Quantity On Hand
- Inventory Item

HELP  
To add more columns to your report, select a field from the "Add Fields" pane above. You can also drag-and-drop them directly into your report.

Account Type

### Report Preview

Item	Inventory Location: Name	Description	Inv. Value / % of Inv. Value	On Hand
Item Type 1				0
Item 2	Inventory Location: Nam	Description 0	\$40000.00	1
Item 3	Inventory Location: Nam	Description 1	\$30000.00	2
Item 4	Inventory Location: Nam	Description 2	\$20000.00	3
Item 5	Inventory Location: Nam	Description 3	\$10000.00	6
Total			\$100000.00	6

Move Left Move Right Remove Column

Quantity On Hand: Quantity On Hand

Column Label Summary

Preview Save Save As Delete

# Financial Red Flags Review – Negative Inventory

## ▲ Negative Inventory

### - Inventory Valuation – Filters

#### Report Builder SN MC NEGATIVE INVENTORY VALUATION SUMMARY

Download XML More

● Edit Columns ● Filters ● Sorting ● More Options

NAME \*  
SN MC Negative Inventory Valuation Summary

No items to show.

ADD FIELDS

- + Quantity On Hand
- + Inventory Item

HELP

To add more filters to your report, select a field from the "Add Fields" pane above. Then select or enter a value to filter the report by.

Account Type

#### Choose Filters

REPORT COMPONENT*	FIELD*	VALUE	SHOW IN FILTER REGION
Quantity On Hand	Date	Filter: Before and Including Date Range: today To: 12/19/2025	Yes
Location	Location: Name	Filter: equal to - All -	Yes
Inventory Item , Quantity On Hand	Subsidiary	Filter: Subsidiary Context Parent Company (Consolidated)	Yes
Quantity On Hand	Quantity On Hand	Filter: less than To: 0.0 Unit of Measure: Stock	Yes

✓ Add ✕ Cancel + Insert

Preview Save Save As Delete

# Financial Red Flags Review – Negative Inventory

## ▲ Negative Inventory

### - Saved Search - Criteria

#### Saved Item Search

List Search Mon

SN MC Negative Inventory Item Search

[Save & Run](#) [Cancel](#) [Preview](#) [New Template](#) [Change ID](#) | [Actions](#)

SEARCH TITLE \*

SN MC Negative Inventory Item Search

ID

customsearch2647

OWNER \*

Dean Carazza

PUBLIC

AVAILABLE AS LIST VIEW

- AVAILABLE AS DASHBOARD VIEW
- AVAILABLE AS SUBLIST VIEW
- AVAILABLE FOR REMINDERS
- SHOW IN MENU
- AVAILABLE AS PRODUCT FEED

[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 \*

FORMULA

Location On Hand

is less than 0

Transaction : Date

is on or before today

# Financial Red Flags Review – Negative Inventory

## ▲ Negative Inventory

### - Saved Search - Results

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

Use this tab to indicate columns to be included in the search results as well as sort order.

**SORT BY**  
Name  DESCENDING

**THEN BY**  
 DESCENDING

**THEN BY**  
 DESCENDING

**OUTPUT TYPE**  
Normal

SHOW TOTALS

RUN UNRESTRICTED  DISALLOW DRILL DOWN

MY PREFERRED SEARCH RESULTS

**Columns •** Drill Down Fields

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
:: Name								
:: Display Name								
:: Description								
:: Type								
:: Base Price								
:: On Hand								
:: Location On Hand								
:: Inventory Location								

Add  Cancel  Insert  Remove  Move Up  Move Down  Move To Top  Move To Bottom

# Financial Red Flags Review – Account Balances Opposite Natural Debit/Credit

## ▲ Account Balances Opposite Natural Debit/Credit

### - Criteria

#### Saved Account Search

More

SN MC Account Balances Opposite Natural Debit/Credit Account Search

[Save & Run](#) [Cancel](#) [Preview](#) [New Template](#) [Change ID](#) | [Actions](#)

SEARCH TITLE \*  
SN MC Account Balances Opposite Natural Debit/Credit Account Sea

ID  
customsearch2648

OWNER \*  
Dean Carazza

- PUBLIC
- 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 *	FORMULA
Inactive	is false	
Type	is not Statistical	
Balance	is not 0.00	
Formula (Text)	is Yes	CASE WHEN (CASE WHEN SUBSTR({number},1,1) IN ('1','5','6','7') THEN 'Debit' ELSE 'Credit' END) = 'Debit' AND {balance} < 0 THEN 'Yes' WHEN (CASE WHEN SUBSTR({number},1,1) IN ('1','5','6','7') THEN 'Debit' ELSE 'Credit' END) = 'Credit' AND {balance} > 0 THEN 'Yes' ELSE 'No' END



# Financial Red Flags Review – AI Exception Management

## ▲ To setup AI Exception Management

### - Enable Features

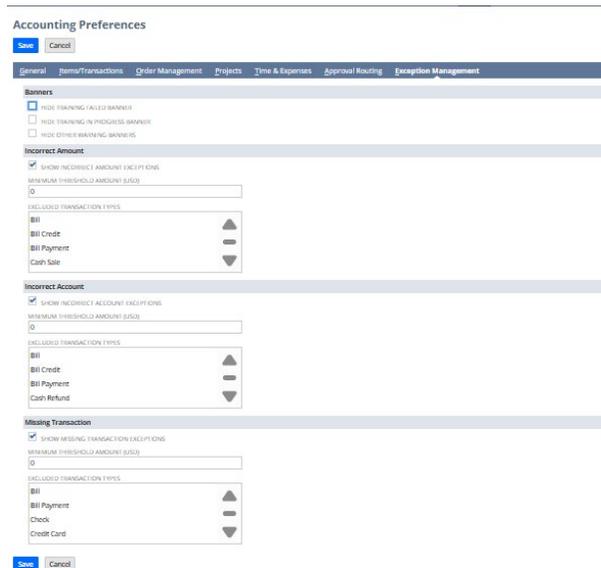
- Setup>Company>Enable Features>Accounting>Exception Management Checked



### - Accounting Preferences

- Can setup preferences

› Setup>Accounting>Accounting Preferences>Exception Management Tab

A screenshot of the "Accounting Preferences" web interface, specifically the "Exception Management" tab. The interface has a top navigation bar with tabs for "General", "Items/Transactions", "Order Management", "Projects", "Time & Expenses", "Approval Routing", and "Exception Management". The "Exception Management" tab is active. Below the navigation bar, there are three sections: "Banners", "Incorrect Amount", and "Missing Transaction". Each section has a "SHOW INCORRECT / MISSING TRANSACTION EXCEPTIONS" checkbox checked, a "MINIMUM THRESHOLD AMOUNT (USD)" field, and a list of transaction types with up/down arrows. The "Banners" section has three checkboxes for "HIDE TRAINING-FAILED BANNER", "HIDE TRAINING-IN PROGRESS BANNER", and "HIDE OTHER WAITING BANNERS". The "Incorrect Amount" section has a list of transaction types: "Bill", "Bill Credit", "Bill Payment", and "Cash Sale". The "Missing Transaction" section has a list of transaction types: "Bill", "Bill Payment", "Check", and "Credit Card". At the bottom of the page, there are "Save" and "Cancel" buttons.

# Financial Red Flags Review – AI Exception Management

- ▲ To setup AI Exception Management
  - Can add the Exception Management Portlet to your Home Dashboard

The screenshot displays a software dashboard interface. At the top, a navigation bar includes icons for home, star, and refresh, followed by menu items: Activities, Payments, Transactions, Lists, Reports, Analytics, Customization, Documents, Setup, Commerce, Implementation, Administration and Controls, and SuiteQL. Below the navigation bar, the main area is titled 'Home' and shows a 'Personalize Dashboard' window. This window contains a grid of portlets. The 'Exception Management' portlet is highlighted with a yellow background. Other portlets include Analytics, Bank Reconciliation..., Calendar, Custom Portlet, Custom Search, KPI Meter, KPI Score, Quick Add, Quick Search, RSS/Atom Feed, Recent Records, Reminders, Report Snapshots, SMT Links, and Search F. Below the portlet grid, there are two widgets: 'KPI Meter' with a dropdown menu set to 'Income', and 'SN Weekly Commitment Search' with a 'DATE' dropdown set to 'All'.

# Financial Red Flags Review – AI Exception Management

- ▲ To setup AI Exception Management
  - Can add the Exception Management Portlet to your Home Dashboard

### Exception Management

Transaction Errors **Expected Transactions**

Exceptions Pending Resolution **5**

Expected Amount **\$15K**

Accounting Period Entity Subsidiary

TYPE	TRANSACTION TYPE	ACCOUNTING PERIOD	EXPECTED AMOUNT	ENTITY	SUBSIDIARY	ACTION
Missing Transaction	Bill Payment	Dec 2025	\$6,737.80	<a href="#">Emerald Computer Syst...</a>	US West	<a href="#">View Details</a>
Missing Transaction	Bill Payment	Dec 2025	\$5,320.94	<a href="#">Davidson Box</a>	US East	<a href="#">View Details</a>
Missing Transaction	Bill Payment	Dec 2025	\$1,684.94	<a href="#">Timmy Hillshape - US East</a>	US East	<a href="#">View Details</a>
Missing Transaction	Bill Payment	Dec 2025	\$532.06	<a href="#">Cables R Us</a>	US East	<a href="#">View Details</a>
Missing Transaction	Bill Payment	Dec 2025	\$380.04	<a href="#">License Manufacturing</a>	US East	<a href="#">View Details</a>

Visit: [Exception Management](#)

### Potentially Missing Transaction **Pending Resolution**

Based on your historical transactions, we expect a transaction of type Bill Payment for 1011 Checking - East and [License Manufacturing](#) to be posted between 11/28/2025 and 12/04/2025. This transaction wasn't posted yet. The potential impact on the financial statements is \$380.04.

ENTITY	EXPECTED AMOUNT
License Manufacturing	\$380.04

▼ **Past Transactions**

TRANSACTION	DATE	AMOUNT
<a href="#">Bill Payment #22</a>	10/01/2025	\$(411.34)
<a href="#">Bill Payment #21</a>	09/01/2025	\$(444.05)

# Operational Red Flags Review



# Operational Red Flag Review

- ▲ Late Shipment Saved Search
- ▲ Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date
- ▲ Last Customer Order Search

# Operational Red Flag Review – Late Shipment Saved Search

## ▲ Late Shipment Saved Search

### - Criteria

#### Saved Transaction Search

List Search More

SN MC Late Shipment Transaction Search

Save & Run Cancel Preview New Template Change ID Actions

SEARCH TITLE \*  
SN MC Late Shipment Transaction Search

ID  
customsearch2649

OWNER \*  
Dean Carazza

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 *	FORMULA
Type	is Sales Order	
Main Line	is true	
Ship Date	is not empty	
Actual Ship/Receipt Date	is not empty	
Formula (Numeric)	is greater than 0	{actualshipdate}-{shipdate}

▼

Add Cancel Insert Remove

# Operational Red Flag Review – Late Shipment Saved Search

## ▲ Late Shipment Saved Search

### - Results

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

Use this tab to indicate columns to be included in the search results as well as sort order.

**SORT BY**  
Formula (Numeric)  DESCENDING

**THEN BY**  
 DESCENDING

**THEN BY**  
 DESCENDING

**OUTPUT TYPE**  
Normal

**CONSOLIDATED EXCHANGE RATE**  
Per-Account

SHOW TOTALS

RUN UNRESTRICTED  MY PREFERRED SEARCH RESULTS

DISALLOW DRILL DOWN

**Columns •** Drill Down Fields

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Order Type								
*								
Date								
As-Of Date								
Period								
Tax Period								
Type								
Document Number								
Name								
Account								
Memo								
Amount								
Actual Ship/Receipt Date								
Ship Date								
Formula (Numeric)			(actualshipdate)-(shipdate)		Days Late	Custom Label Translation		

# Operational Red Flag Review – Late Shipment Saved Search

## ▲ Late Shipment Saved Search

### - Results

- Note Sorting by Formula Numeric Descending so shows days late by largest to smallest

The screenshot shows a search configuration interface with a dark blue header bar containing navigation tabs: Criteria, Results, Highlighting, Available Filters, Audience, Roles, Email, Audit Trail, Execution Log, and Search Title Translation. Below the header, a blue information box states: "Use this tab to indicate columns to be included in the search results as well as sort order." The configuration area includes sorting options: "SORT BY" is set to "Formula (Numeric)" with a checked "DESCENDING" option; "THEN BY" and "THEN BY" are currently empty. On the right, "OUTPUT TYPE" is "Normal", "CONSOLIDATED EXCHANGE RATE" is "Per-Account", and "SHOW TOTALS" is unchecked. Other options include "MAX RESULTS", "RUN UNRESTRICTED", "DISALLOW DRILL DOWN", and "MY PREFERRED SEARCH RESULTS".

The "Columns" section is titled "Columns • Drill Down Fields" and contains "Remove all" and "Add Multiple" buttons. Below is a table with the following columns: FIELD \*, SUMMARY TYPE, FUNCTION, FORMULA, WHEN ORDERED BY FIELD, CUSTOM LABEL, CUSTOM LABEL TRANSLATION, SUMMARY LABEL, and SUMMARY LABEL TRANSLATION. The table lists various fields, with the last row highlighted in yellow:

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Order Type								
*								
Date								
As-Of Date								
Period								
Tax Period								
Type								
Document Number								
Name								
Account								
Memo								
Amount								
Actual Ship/Receipt Date								
Ship Date								
Formula (Numeric)			(actualshipdate)-[shipdate]		Days Late	Custom Label Translation		

# Operational Red Flag Review – Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date

## ▲ Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date Results

### - Criteria

**Saved Transaction Search** List Search More

SN MC SO with Zero Available Inventory and Upcoming Expected Ship Date

[Save & Run](#) [Cancel](#) [Preview](#) [New Template](#) [Change ID](#) | [Actions](#)

SEARCH TITLE \*  
SN MC SO with Zero Available Inventory and Upcoming Expected Shi

ID  
customsearch2651

OWNER \*  
Dean Carazza

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 *	FORMULA
Type	is Sales Order	
Ship Date	is not empty	
<b>Formula (Numeric)</b>	<b>is greater than 0</b>	<b><math>nvl(\{quantity\},0)-nvl(\{quantityshiprecv\},0)-nvl(\{quantitycommitted\},0)</math></b>
Ship Date	is within 0 weeks from now and 2 weeks from now	
Status	is none of Sales Order:Cancelled, Sales Order:Closed	

# Operational Red Flag Review – Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date

## ▲ Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date Results

### - Results

- Note sort by ship date so shows oldest

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

Use this tab to indicate columns to be included in the search results as well as sort order.

SORT BY: Ship Date  DESCENDING

THEN BY:  DESCENDING

THEN BY:  DESCENDING

OUTPUT TYPE: Normal

CONSOLIDATED EXCHANGE RATE: Per-Account

SHOW TOTALS

MAX RESULTS:  RUN UNRESTRICTED  DISALLOW DRILL DOWN

MY PREFERRED SEARCH RESULTS

Columns • Drill Down Fields

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
:: Order Type								
:: *								
:: Date								
:: As-Of Date								
:: Period								
:: Tax Period								
:: Type								
:: Document Number								
:: Name								
:: Account								
:: Memo								
:: Amount								
:: Actual Ship/Receipt Date								
:: Ship Date								
:: Formula (Numeric)			{actualshipdate}-{shipdate}		Days Late			
:: Quantity								
:: Quantity Fulfilled/Received								
:: Quantity Committed								
:: Formula (Numeric)			nv((quantity),0)-nv((quantityshiprecv),0)-nv((quantitycommitted),0)		Qty Back Ordered			

# Operational Red Flag Review – Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date

- ▲ Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date Results
  - Highlighting

Criteria	Results	Highlighting	Available Filters	Audience	Roles	Email	Audit Trail	Execution Log	Search Title Translation
Highlight if... • Highlight if... (Summary)									
CONDITION *	IMAGE	TEXT COLOR	BACKGROUND COLOR	BOLD	DESCRIPTION	TRANSLATION			
Ship Date is within today	Checkmark			Yes	WTF Guys?				

# Operational Red Flag Review – Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date

## ▲ Sales Orders with Zero Available Inventory and Upcoming Expected Ship Date Results

### - Search Results

SN MC SO with Zero Available Inventory and Upcoming Expected Ship Date: Results List Search Audit Trail

[Edit this Search](#)

**FILTERS**  
 STYLE: Normal

TOTAL: 16																				
EDIT   VIEW	INTERNAL ID	ORDER TYPE	+	DATE	AS-OF DATE	PERIOD	TAX PERIOD	TYPE	DOCUMENT NUMBER	NAME	ACCOUNT	MEMO	AMOUNT	ACTUAL SHIP/RECEIPT DATE	SHIP DATE 4	DAYS LATE	QUANTITY	QUANTITY FULFILLED/RECEIVED	QUANTITY COMMITTED	QTY BACK ORDERED
	<a href="#">Edit</a>   <a href="#">View</a>	4270		12/19/2025		Dec 2025	Dec 2025	Sales Order	260	PIJ1114 Jupiter Technology / Network Install	4210 Sales : Revenue - Services	IT Installation Services	25,000.00		12/19/2025		1	0		1
	<a href="#">Edit</a>   <a href="#">View</a>	37758		12/19/2025		Dec 2025	Dec 2025	Sales Order	464	Dermack Services	4210 Sales : Revenue - Services	AA1: Platinum Support	12,000.00		12/19/2025		1	0		1
	<a href="#">Edit</a>   <a href="#">View</a>	37758		12/19/2025		Dec 2025	Dec 2025	Sales Order	464	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_EMBD	60.00		12/19/2025		1	0		1
	<a href="#">Edit</a>   <a href="#">View</a>	37758		12/19/2025		Dec 2025	Dec 2025	Sales Order	464	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_SAN DIEGO CO	30.00		12/19/2025		1	0		1
	<a href="#">Edit</a>   <a href="#">View</a>	37758		12/19/2025		Dec 2025	Dec 2025	Sales Order	464	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_EMU	120.00		12/19/2025		1	0		1
	<a href="#">Edit</a>   <a href="#">View</a>	37758		12/19/2025		Dec 2025	Dec 2025	Sales Order	464	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_CA	720.00		12/19/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38062			12/20/2025		Dec 2025	Dec 2025	Sales Order	465	Dermack Services	4210 Sales : Revenue - Services	AA1: Platinum Support	12,000.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38062			12/20/2025		Dec 2025	Dec 2025	Sales Order	465	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_EMBD	60.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38062			12/20/2025		Dec 2025	Dec 2025	Sales Order	465	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_SAN DIEGO CO	30.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38062			12/20/2025		Dec 2025	Dec 2025	Sales Order	465	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_EMU	120.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38062			12/20/2025		Dec 2025	Dec 2025	Sales Order	465	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_CA	720.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38165			12/20/2025		Dec 2025	Dec 2025	Sales Order	466	Dermack Services	4210 Sales : Revenue - Services	AA1: Platinum Support	12,000.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38165			12/20/2025		Dec 2025	Dec 2025	Sales Order	466	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_EMBD	60.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38165			12/20/2025		Dec 2025	Dec 2025	Sales Order	466	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_SAN DIEGO CO	30.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38165			12/20/2025		Dec 2025	Dec 2025	Sales Order	466	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_EMU	120.00		12/20/2025		1	0		1
<a href="#">Edit</a>   <a href="#">View</a>	38165			12/20/2025		Dec 2025	Dec 2025	Sales Order	466	Tax Agency CA : Tax Agency CA (United States)	2305 Liabilities - Taxes : Sales Taxes Payable CA	CA_CA	720.00		12/20/2025		1	0		1

# Operational Red Flag Review – Last Customer Order

## ▲ Last Customer Order

### - Criteria

#### Saved Customer Search

List Search Mo

SN MC Last Customer Order Customer Search

Save & Run Cancel Preview New Template Change ID Actions

SEARCH TITLE \*  
SN MC Last Customer Order Customer Search

ID  
customsearch2650

OWNER \*  
Dean Carazza

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 *	FORMULA
Transaction : Type	is Sales Order	
Formula (Numeric)	is greater than 0	sysdate-(transaction.trandate)

# Operational Red Flag Review – Last Customer Order

## ▲ Last Customer Order

### - Results

PUBLIC  
 AVAILABLE AS LIST VIEW

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

Use this tab to indicate columns to be included in the search results as well as sort order.

**SORT BY**  
Transaction : Date  DESCENDING  
THEN BY  DESCENDING  
THEN BY  DESCENDING

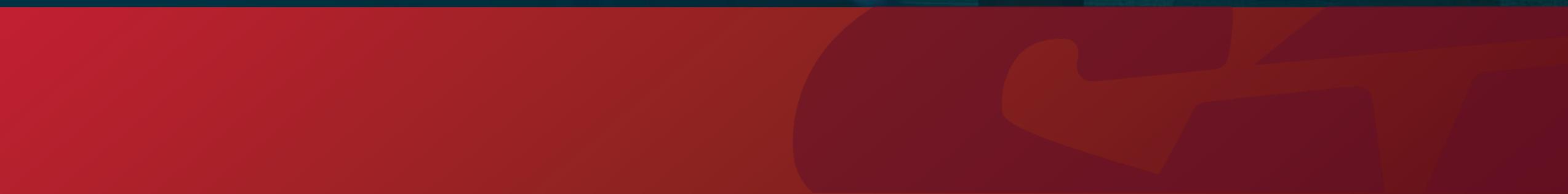
**OUTPUT TYPE**  
Normal  
 SHOW TOTALS  
MAX RESULTS  
 RUN UNRESTRICTED  DISALLOW DRILL DOWN  
 MY PREFERRED SEARCH RESULTS

**Columns •** Drill Down Fields

Remove all Add Multiple

FIELD *	SUMMARY TYPE	FUNCTION	FORMULA	WHEN ORDERED BY FIELD	CUSTOM LABEL	CUSTOM LABEL TRANSLATION	SUMMARY LABEL	SUMMARY LABEL TRANSLATION
Name	Group							
Email								
Phone								
Office Phone								
Fax								
Primary Contact								
Alt. Email								
Transaction : Date	Group							
Transaction : Date	Maximum	Age In Days						

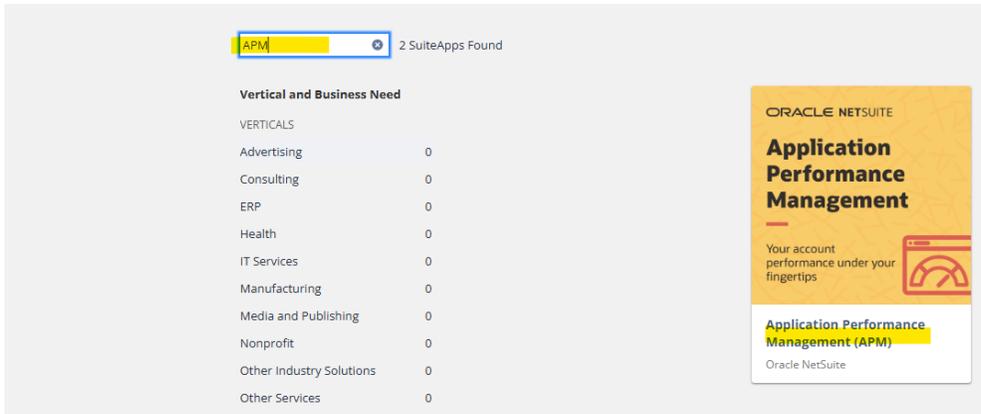
# System Performance Review – Using APM Tool



# System Performance Review – Using APM Tool

- ▲ Install the Bundle
  - Navigate to SuiteApps
  - Search APM

## SuiteApps



## Application Performance Management (APM)



Get visually interactive performance data to gauge the overall health of test and production accounts.

[Overview](#) [Features](#) [Publisher](#)

### Monitor Accounts and Customizations Performance

The NetSuite Application Performance Management SuiteApp provides administrators and IT employees with visually interactive tools to gauge the health of test and production accounts. View actionable data to catch potential bottlenecks before they happen and optimize customizations before deployed to production. Better analyze granular runtime metrics, like page and script execution timings, to help pinpoint areas that may require optimization or other remedial actions.

### Key Benefits

- At-a-glance performance health dashboard to monitor issues that may affect the performance of record pages, scripts, saved searches, integrations, and processors
- Dedicated tools for each type of issue to view visualized performance data with metrics and logs
- Easily identify performance bottlenecks and other issues with detailed figures and charts
- One convenient set up page allows administrators to grant access to multiple roles and employees

Installed

PUBLISHER  
Oracle NetSuite  
FIRST RELEASE DATE  
04/05/2021  
INSTALLED VERSION  
2.1.7  
LATEST VERSION  
2.1.7  
UPGRADES  
Managed



# System Performance Review – Using APM Tool

▲ Customization>Performance>Performance Health Dashboard

## Performance Health Dashboard

Last 7 Days As of Dec 19 2025 11:48 AM ⓘ

SHOW SNOOZED ⓘ

### Record Pages

✔ No Issues Found

No issues detected recently.

### Scripts

✔ No Issues Found

No issues detected recently.

### Saved Searches

✔ No Issues Found

No issues detected recently.

### Integrations

✔ No Issues Found

No issues detected recently.

### Processors

✔ No Issues Found

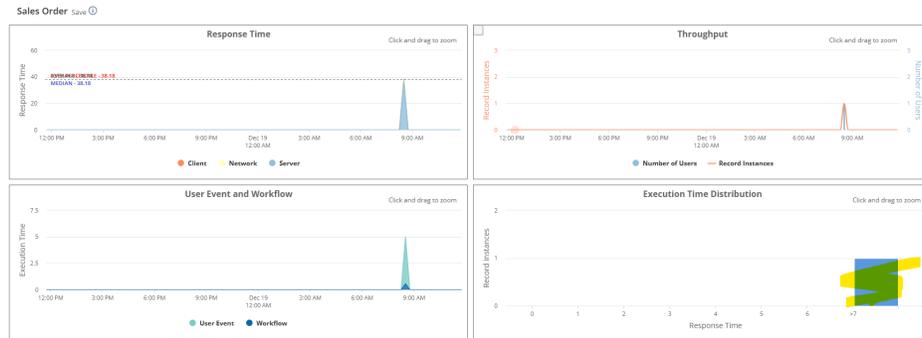
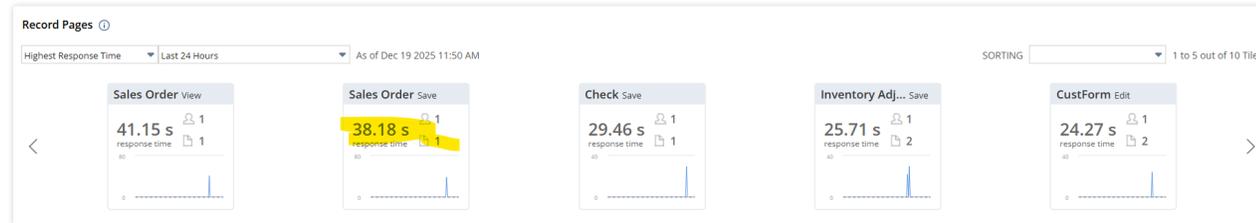
No issues detected recently.

# System Performance Review – Using APM Tool

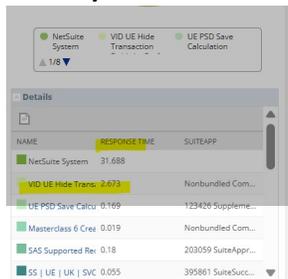
## ▲ Customization>Performance>Record Pages Monitor

- Filter = Highest Response Time

### Record Pages Monitor



- Sort details to right by response time – Hide script taking 2 seconds – send to Dev to Review – maybe saved search running on every record





# Audit Trails



# Audit Trails

## ▲ Transactions>Management>View Audit Trail

- Can filter
- Show Check >\$1M
- Account
- User
- Dates
- Actions

### View Audit Trail

Submit

USERS

<Type & tab for single value>

SHOW INACTIVES

ACTION

CREATE

CHANGE

DELETE

TRANSACTION DATE

All

FROM

TO

AMOUNT  ANY  =  >  <

Submit

TRANSACTION TYPE

Bill

Bill Credit

Bill Payment

Cash Refund

Cash Sale

ACCOUNT

<Type & tab for single value>

NAME

<Type & tab for single value>

SHOW INACTIVES

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](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 1/23/26 12-1PM PST
  - Topic TBD
- ▲ 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!

[scalenorth.com](https://scalenorth.com)

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