

NETSUITE TOP TIPS

WEBINAR SERIES



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 NETSUITE

Open Invoice Conversion

Mastering SuiteFlow, SuiteScript, historical and balance data and open invoices must be loaded.

Conclusion: Open invoices are in the process of changing from the implementation.

Steps:

- Connect the two balance A/R Trade data without a Customer reference to an account that will represent the historical A/R Trade.
- When converting open invoices, A/R Trade entries will link to the customer and should be protected in a new A/R Trade account.
- Create a custom entry for each invoice to include the report of the invoice and prevent overwriting.
- Do not set a customer reference on the A/R Trade account or credit the A/R Trade.

Result: A/R Trade balance history over time right into historical and non-historical A/R Trade and an A/R Aging report to support reconciliation to customer.

Data Conversion—Acknowledging data conversion challenges, converting open invoices, and taking advantage of NetSuite External ID simplifies the data conversion process.

Take Advantage of NetSuite Partner Integrated Solutions

- Third-party, wrap-up/agents can be used to enhance out-of-the-box Suiteable functionality. (e.g., Carta, Avaya, Phorix)
- Third-party wrap-ups integrate with Suiteable and can increase efficiency for approved processing, billing, and more.
- First checks, apply digital signatures, and process A/C payments
- First checks are off-balance and need not appear in ledger
- Limit access to A/C and check processing functions based on roles
- Process only checks and A/C payments—don't record raw rate data against out of Phorix

Transaction Processing—Leveraging NetSuite partner integrated solutions enhances out-of-the-box functionality, sales order and purchase order tips, and electronic payment processing.

Migration Between Accounts

After custom objects are ready for production, they can be developed and migrated from one account to another.

Migration Limitations:

- Custom report scripts will need to be re-applied manually
- Interdependencies of custom fields being placed in proper order on custom forms

Database Migration Strategy & Field-Level Security—Using multiple accounts to manage configurations and custom objects is a key facilitator for migrating accounts. SuiteFlow, SuiteScript, and Field Definition Record allow required fields on forms to be accessed by one user group and remain hidden to others.

Workflow Release Status

Defines whether the workflow rule is testing or released mode.

- Testing mode allows the workflow to run only for the owner of the workflow, without delegation to other users
- Released mode makes the workflow applicable to all users

Workflow Routing & User Interface Customization—Mastering SuiteFlow allows users to build and customize workflows, while tailoring the user interface meets business needs and creates a unique user experience.

SuiteScript Metering

The following table identifies the allowed metering limit for the different script types.

Script Type	Total Units Allowed Per Script
Serialized Scripts	10,000
User Event Scripts	1,000
Client Scripts	1,000
Subsidiaries	1,000
RESTlets	5,000
Portlet Scripts	1,000
Mass Update Scripts	1,000
Bundle Installation Scripts	10,000
Workflow Action Scripts	1,000

SuiteScript Limitations—Overcoming SuiteScript's limitations enables developers to extend NetSuite beyond the capabilities provided through SuiteBuilder point-and-click customization.

About MorganFranklin Consulting

MorganFranklin is a strategy and execution-focused business consulting firm and professional advisor. We provide strategic thinking and hands-on support to help clients manage growth and maximize performance. Our solutions always consider the key connections between finance and accounting, operations, technology, and risk—connections that are critical to success. Clients say that our responsiveness, flexible style, and fast access to proven professionals make us an invaluable business partner and advisor.

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