



NetSuite Dashboards



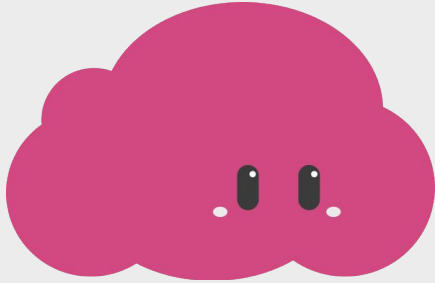
Presented @ SF NetSuite User Group Meetup

NetSuite Meetup

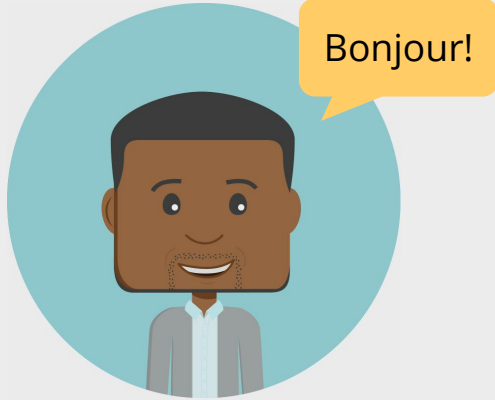
San Francisco Bay Area & Silicon Valley

08.21.18

Agenda



1. **Introduction to NetSuite Dashboard**
2. **Use Case #1: Customer Service Dashboard**
3. **Use Case #2: Product 360 Degree Dashboard**

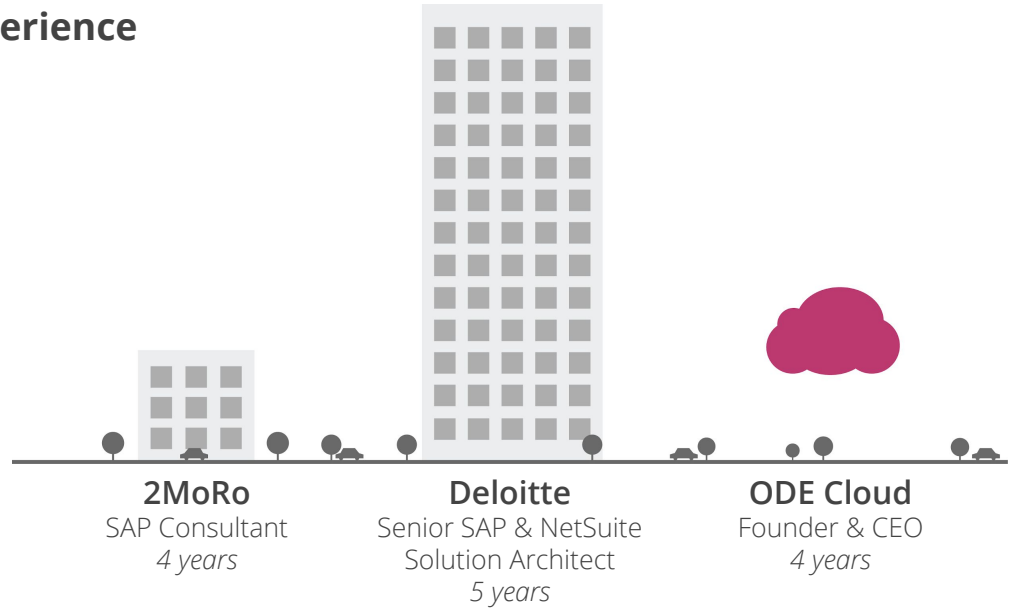


Osar Iyamu

Founder & CEO @ODE Cloud

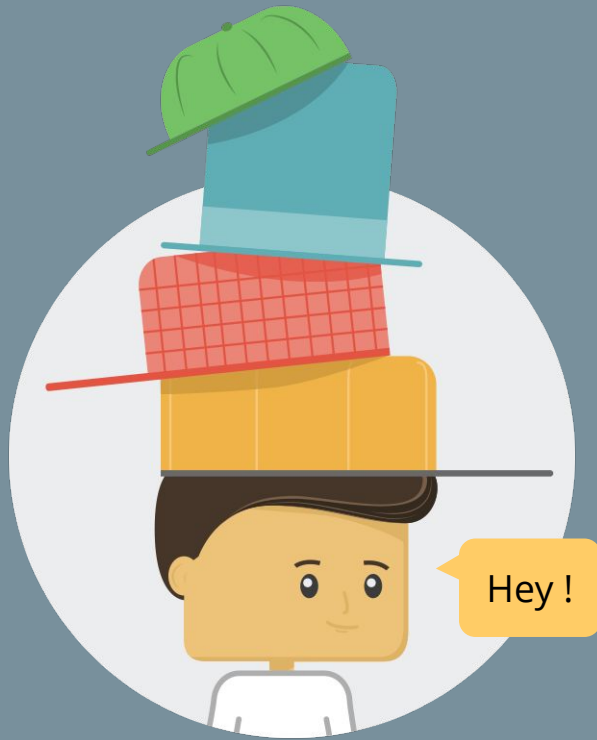
Meet Today's Teacher #1

Experience



Expertise

NetSuite Functional Consultant Helping Midsize & Early Stage Companies Optimize Operations & Maximize Their Productivity Using NetSuite



Dean Dighe

*Sr. IT Business Systems Analyst
@NutriBullet*

Meet Today's Teacher #2



NutriBullet
Technology Enthusiast
2 years

- Customer Service Project
- Marketing Project
- Analytics Project
- Ecommerce Project

Expertise

Experienced NetSuite Admin, With Strong Business Background, Integrations Management and Deep-Dive Actionable Analytics



Introduction to NetSuite Dashboard

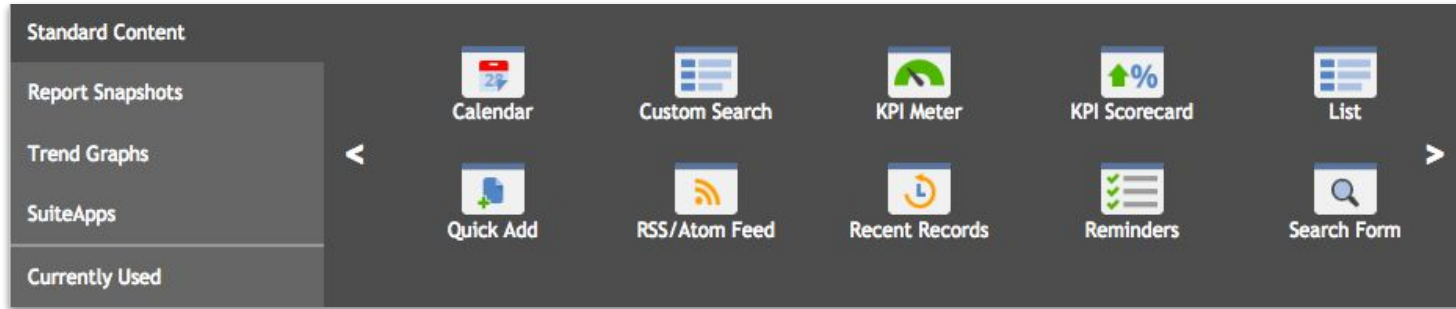
Out-of-the-box



What is on NetSuite Home Dashboard?

The NetSuite Home Dashboard is the first page displayed when user logs into NetSuite. The dashboard page is comprised of what are known as “portlet”. These portlets can be configured to provide various information, which can be displayed in a variety of ways.

Dashboard Portlets



Standard Content: Allows users to add calendars, searches, KPIs, reminders, RSS feed...

Report Snapshots – Displays a graphical chart of specific associated reports

Trend Graphs – Displays a chart of selected KPI data over time

SuiteApps - Portlets available through SuiteApps installed in the NetSuite account

Currently Used – Portlets in place on the current dashboard



Jess

Customer Service Supervisor
@NutriBullet

Awesome!

I can't wait to start tracking my team's performance in real-time with actionable insights.

Yeah! We Are LIVE on NetSuite



Does this look familiar?



ORACLE NETSUITE ODS

Search

Help Ocar Iyamu Ocar Iyamu
ODOCLOUD CONSULTING (CA) - Administrator

Activities Transactions Lists Reports Documents Setup Customization Pricing EasyAdmin Support

Viewing: Portlet date settings Personalize Layout

Home

KPI Meter

Actual vs Forecast

No data available for this portlet. Please enable the Sales & Forecast KPIs

Actual vs Forecast

Quick Search

SEARCH

SEARCH FOR Name/ID

Search

Settings

Personalize Dashboard
Set Preferences
Publish Dashboard List
Configure Subscription Settings

New Release

Welcome to
Release 2018.2
53 Days Away

YOUR NEW RELEASE DATES
Release Preview: 8/14/2018 9:00 AM PDT - 10/12/2018 2:00 AM PDT
Upgrade: 10/12/2018 12:00 AM PDT - 10/12/2018 2:00 AM PDT¹

New SuiteAnalytics
Announcing Suite Analytics beta! Explore how you can use SuiteAnalytics beta to create complex queries quickly and easily. Deliver accurate, unique business insights from rich visualizations including new pivot table capabilities.
[LEARN MORE](#)

Global Financials
Gain more control over period close accounting, reporting and compliance with Period End Journal Entries. Convert payments to posted transactions clearing AP and get accurate cash balance for status and forecasting with In-Transit Payments. New native localizations fulfilling reporting, tax and regulatory requirements for China, India and Japan.
[LEARN MORE](#)

Supply Chain and Order Management
Streamline engineering operations and gain better control of product changes with Engineering Change Orders. Optimize product quality by defining inspections, tracking results and capturing images from our tablet interface while triggering corrective actions. Gain deeper insights into category sales and improve planning with merchandise hierarchy.
[LEARN MORE](#)

See more new features >>

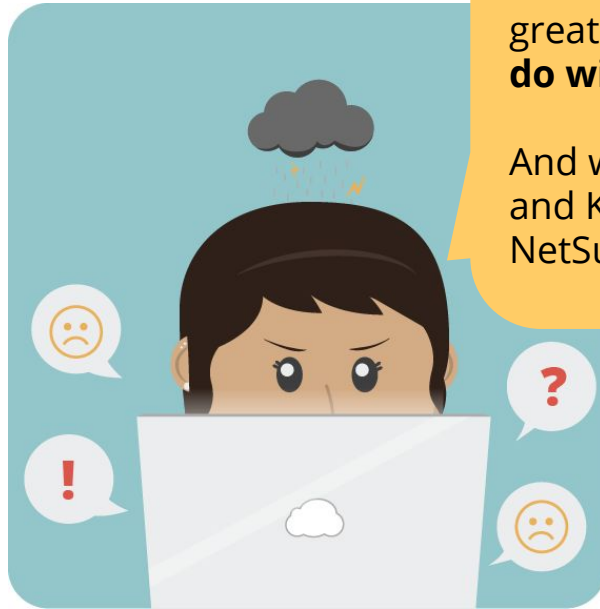
Sneak Peeks Release Notes Release Preview Login Release Preview Test Plan 2018.2 Overview

¹Average upgrade time is less than one hour. Your time may vary.

Key Performance Indicators

No content
Please set up this portlet by clicking on the menu icon.

The Problem



The “New Release” picture looks great. **But what does that have to do with me?**

And where are all the cool graphs and KPIs we spoke about before the NetSuite Go-live?!*^?!?!!



Hey Jess!

**I understand your frustration.
How about we fix this?**



Use Case#1: Customer Service Dashboard

1st: Set Your Objectives



Customer Service Optimization

01

Understand the main reasons why customers call for service

02

Track the average time it takes to complete a customer request

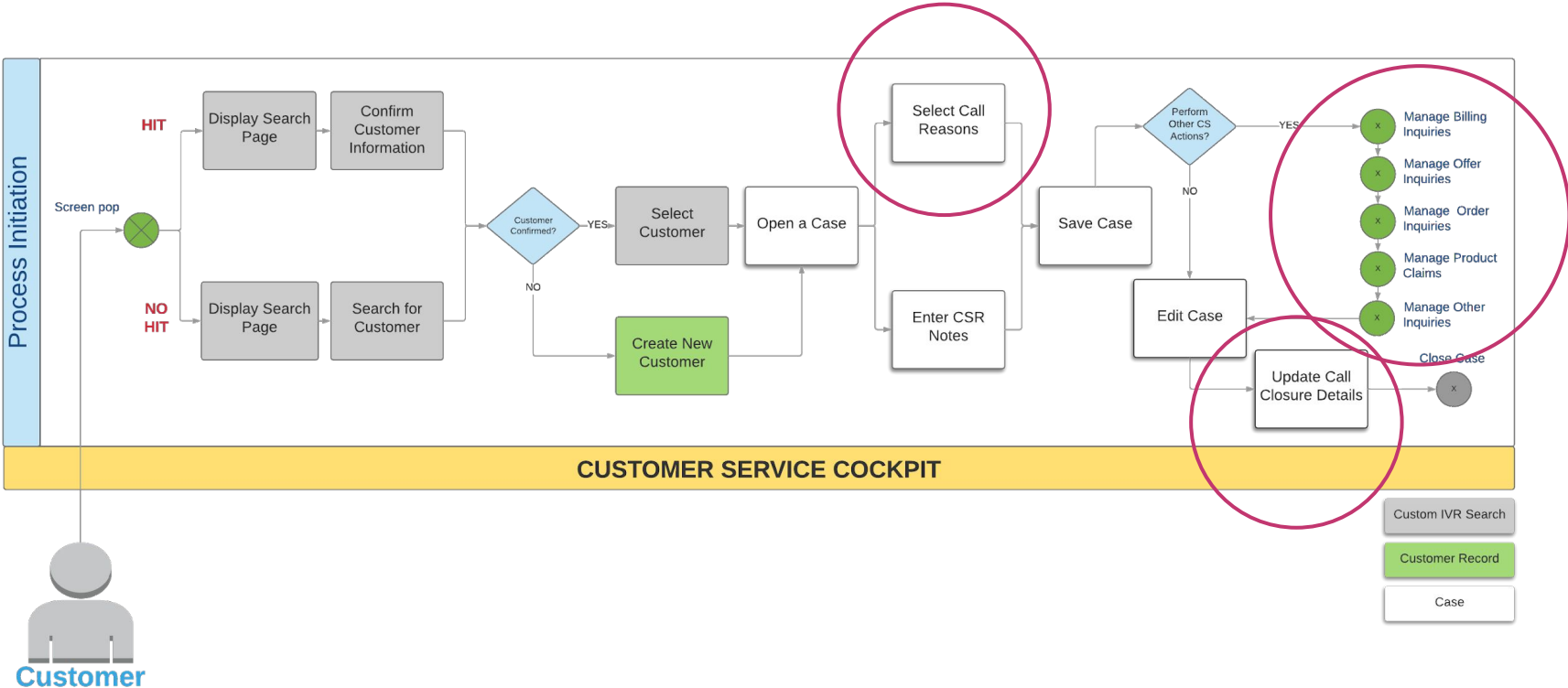
03

Help track support activities, from initiation to completion of customer requests.

2nd: Build Your Data Flow



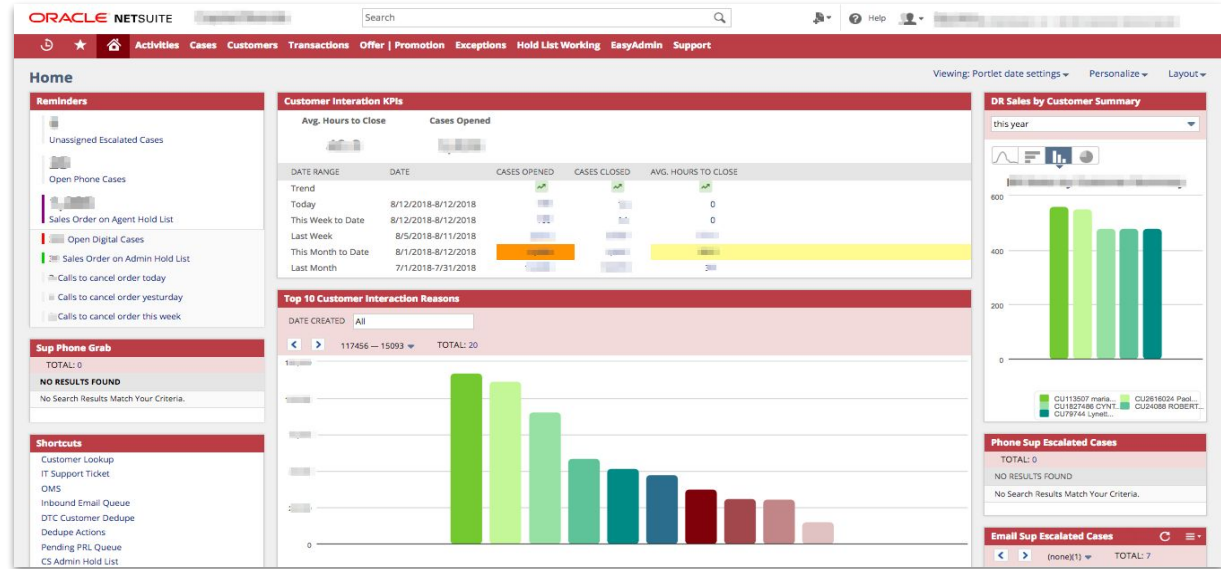
NetSuite Demo



3rd: Customize Your Dashboard



NetSuite Demo



What is on this dashboard?

Trend graph: Main customer call reasons. **Reminders:** Unassigned escalated cases - Real-time open cases. **KPI scorecard** (date comparison): Average time to close a case - Number of Cases. **Saved Search:** Case grab (allow to quickly grab an open case and start working on it). And more...



Use Case#2: Product 360 Degree Dashboard

1st: Set Your Objectives



Product 360 Degree

01

Un-silo the product line information (sales, after-sales, support, drains on product line)

02

Aggregate performance on one page

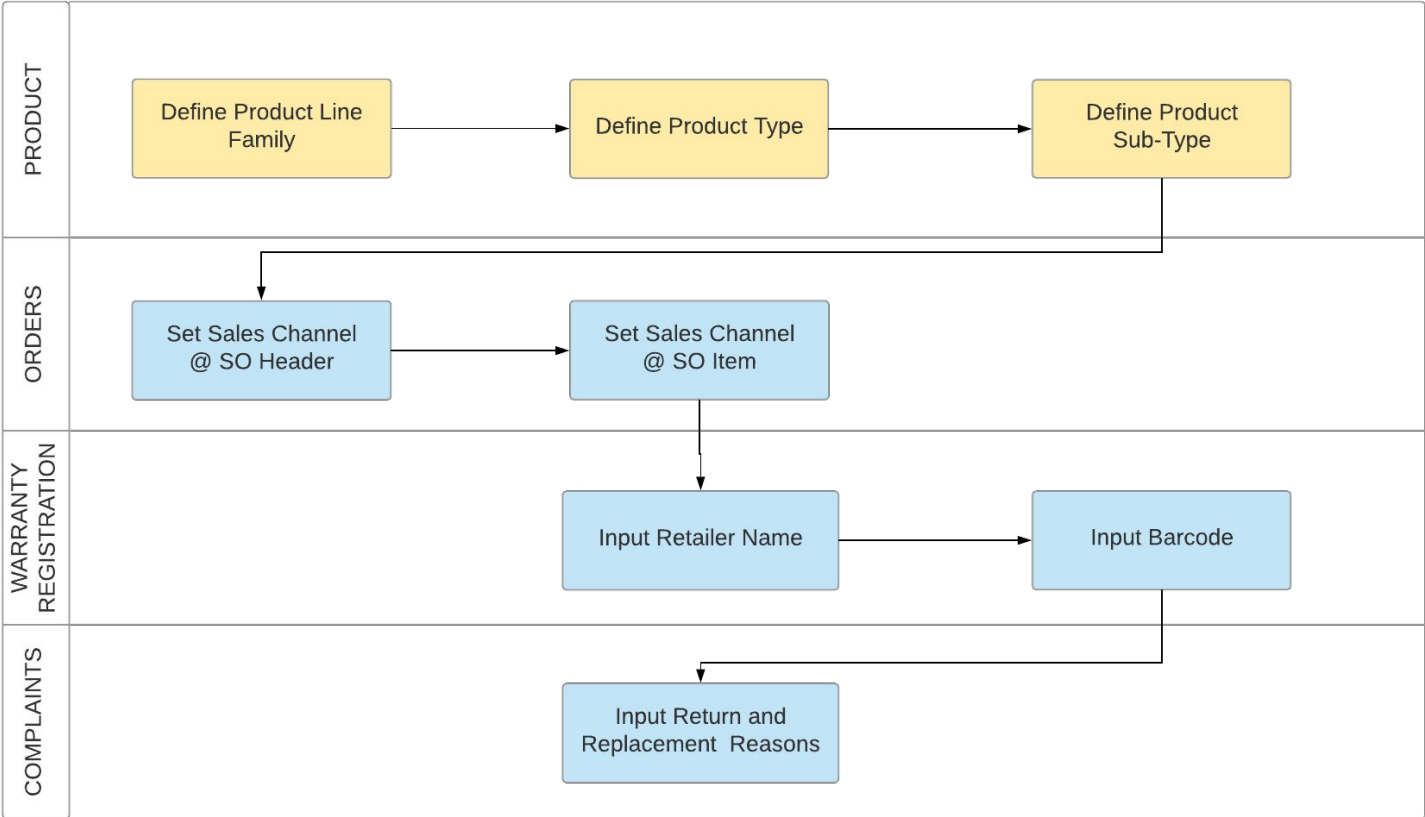
03

Segregate product from the noise of other products

2nd: Build Your Data Flow



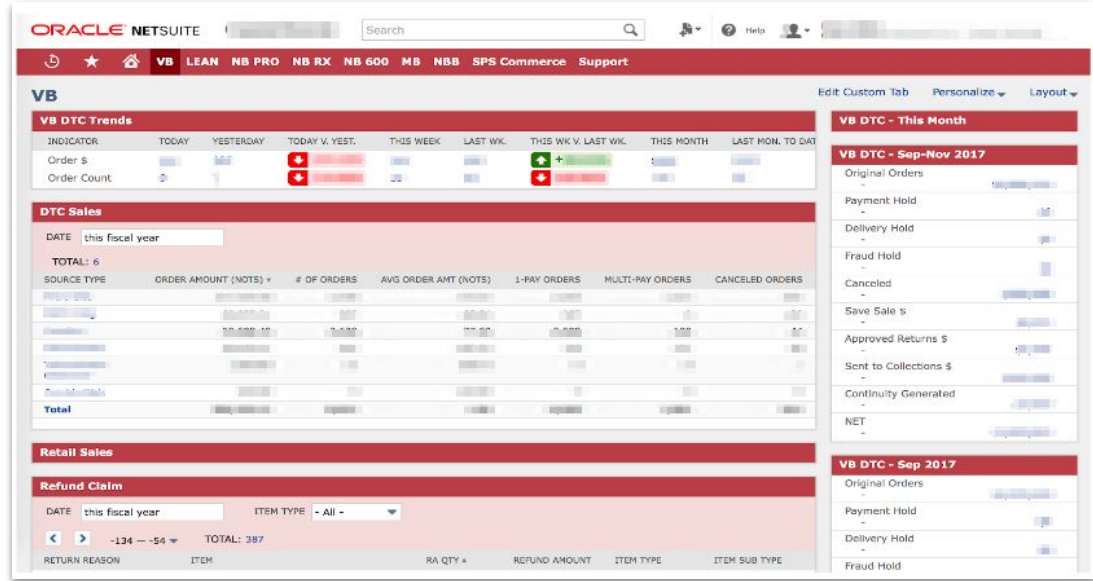
NetSuite Demo



3rd: Customize Your Dashboard



NetSuite Demo



What is on this dashboard?

KPI scorecard: Product Line Sales Trend. Last Year, This Year To Date and Last Month Sales and Upsells (Subscription Plans). **Custom Search:** B2B/B2C Sales. Refund and Replacement Claims. Product Incidents. Inventory Status.



Summary

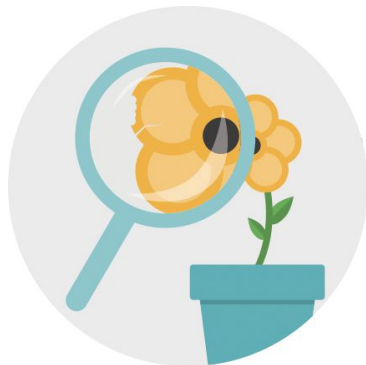
At this point, we know the capabilities of NetSuite dashboard and how it may be used to present important insights on your company, customers and product at a glance.

Next Step & Homework

Start the discussion with different Managers and Directors within your organization and try to learn what metrics would help them be more effective in their job and role.

Challenge: Start building role-specific dashboards with the insight you get from these Managers and Directors.

01



Set Your Objectives

02



Build Your Data Flow

03



Customize Your Dashboard

Questions?



ODE•CLOUD

If you have any questions about this presentation or want to know more about Analytics with NetSuite or beyond, please feel free to reach out.

osar@odecloud.com

deand@capitalbrands.com

Be Creative with NetSuite Tools.

There are many ways to use NetSuite features out-of-the-box. **Be creative and find what works best for your company**, and please come share with [San Francisco/Bay Area NetSuite User Group](#).

