Automate exception management with NetSuite

November 20, 2014
Welcome!

Important Web Seminar Notes

- We have automatically muted the line. During the presentation, all participants will be in listen-only mode.
- Please turn off all webcams.
- Following the presentation we’ll have a Q&A session. Submit questions via the Q&A feature. Simply select the Q&A window, type your question into the dialog box, and click the “Ask” button.
- The slides and recording of this call will be sent to attendees for today’s program.

McGladrey
Presenter

Gary Leitner
Director, Technology Consulting

Matt Kenney
Principal, Technology Consulting
One System for Running a Business

- CEO
- CFO
- Sales Rep/Manager
- Support Manager
- Ecommerce Manager
- Shipping Manager
- Vendors
- Partners

SINGLE DATA SOURCE

NetSuite

ECOMMERCE

PSA

CRM+

ERP
Agenda

- Exception Management Scenarios
  - Executive financial metric exceptions
  - Sales orders under margin expectations
  - PO receipt exceptions
  - 1099 vendors with no tax ID
  - Customers put on credit hold
  - Automated collection email alerts
  - Missing recurring vendor bills
Summary – NetSuite Tools

- Dashboard KPI’s
- KPI scorecards with highlighting
- Dashboard reminders
- Saved search portlets with highlighting
- Saved search email alerts
- SuiteFlow actions
Summary – Business Benefits

- Increase profit
- Improve customer satisfaction
- Improved regulatory compliance
- Reduce operational costs
Q & A

- Submit questions via the Q&A feature. Simply select the Q&A window, type your question into the dialog box, and click the “Ask” button
- The slides and recording of this call will be sent to attendees for today’s program

Brent Knowles
Brent.knowles@mcgladrey.com

facebook.com/McGladreyTech
twitter.com/McGladreyTech
twitter.com/McGladreyERP
McGladrey LLP is the U.S. member of the RSM International ("RSMI") network of independent accounting, tax and consulting firms. The member firms of RSMI collaborate to provide services to global clients, but are separate and distinct legal entities which cannot obligate each other. Each member firm is responsible only for its own acts and omissions, and not those of any other party.

McGladrey, the McGladrey signature, The McGladrey Classic logo, The power of being understood, Power comes from being understood and Experience the power of being understood are trademarks of McGladrey LLP.

© 2012 McGladrey LLP. All Rights Reserved.