

# NetSuite Health Check

Maximize Performance & NetSuite ROI



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*Maximize Performance & NetSuite ROI*



**The NetSuite Health Check** provides an in-depth report of your entire NetSuite environment—including custom workflows, scripts and data. The Health Check is an actionable report to help you understand NetSuite better, including where performance can be improved and where enhancements can be made.

## **When was your last system evaluation?**

Protelo will provide you with an inventory of your custom scripts and workflows including evaluation, review their usage and performance, as well as recommend ways to improve their efficiency such as:

- Audit active/inactive scripts
- Suggest script refactoring
- Suggest ways to “de-customize” your system

## *NetSuite Sample Health Check Sections covered.*

### NetSuite Setup:

#### 1. Review of NetSuite Modules

- a. Components
- b. Add-On Modules
- c. Add-On Bundles

#### 2. Review Netsuite Features Enabled

- a. Company
- b. Accounting
- c. Tax
- d. Transactions
- e. Items & Inventory
- f. Employees
- g. CRM
- h. Analytics
- i. Web Presence
- j. Suite-cloud

#### 3. Review Record Naming & Auto-Generated Numbering

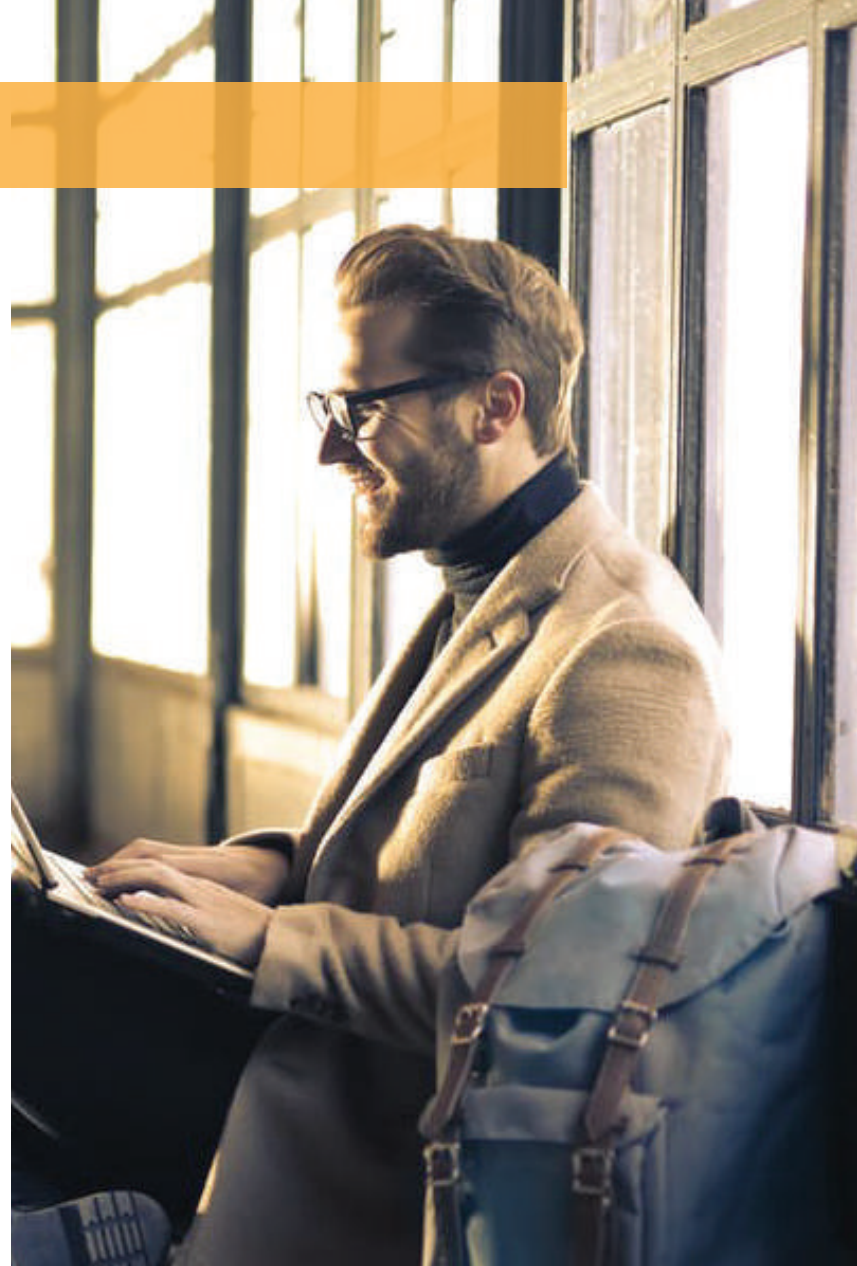
#### 4. Review Integrations to Third-Party Systems

#### 5. Review of Accounting Setup

#### 6. Custom Centers, Tabs & Categories

- a. Center Links
- b. KPI Scorecards

#### 7. Custom Centers, Tabs & Categories



## NetSuite Reports / Searches / Dashboards:

### 1. Custom Reports

- a. Financial
- b. Operations
- c. Sales
- d. Forecast

### 2. Review Netsuite Features Enabled

- a. Company
- b. Accounting
- c. Tax
- d. Transactions

### 3. Custom Dashboards

- a. Published Dashboards
- b. Custom Portlets
- c. Role Specific Dashboards

## NetSuite Lists Review:

### 1. Accounting

- a. Items
  - i. Assembly
  - ii. Inventory Item
  - iii. Service Items
  - iv. Non-Inventory Items
- b. Units of measure
- c. Shipping Items

### 2. Review Netsuite Features Enabled

- a. Company
- b. Accounting
- c. Tax
- d. Transactions

### 3. Expiring Inventory

### 4. Review NetSuite Features Enabled

- a. Bins
- b. Item Revisions

### 5. Relationships

- a. Customers
- b. Vendors
- c. Partners

### 6. Case Management



# Need help with NetSuite?

## Let's talk!

Our senior team of experienced NetSuite consultants is available and happy to assist right away. We work on-demand, when you need us. No long-term commitments or retainers. Check out more NetSuite tips, tricks, and how-to blog posts from our experts! We can help you to implement, service and support NetSuite today.

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