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NetSuite®

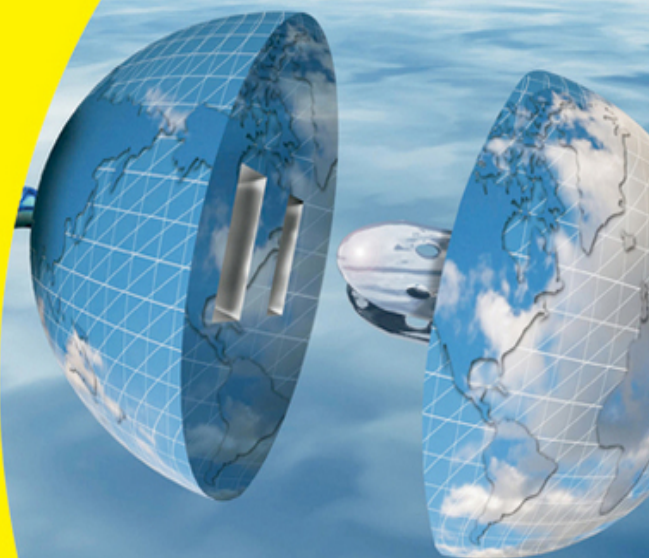
FOR

DUMMIES®

Learn to:

- Apply the NetSuite CRM and ERP Web solutions
- Become proficient with the various components of NetSuite
- Configure NetSuite using the "click, not code" capability
- Get organized and bring all the parts together

Julie Kelly
Luke Braud
Malin Huffman



NetSuite® For Dummies®

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NetSuite[®] For Dummies[®]

**by Julie Kelly, Luke
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—J.K.

—L.B.

—M.H.

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Introduction

This book provides a friendly introduction to NetSuite. If you've picked up this book, chances are you already know something about the product, but here's a quick summary: NetSuite is the number one, Web-based business software suite available as of early 2010. NetSuite offers an integrated application that wraps all the essential information technology needs — ERP, CRM, HR, customer service, ecommerce, warehouse and inventory management, and project management — into one tidy application.

Why should you consider NetSuite? Chances are you're drawn to some of the benefits commonly enjoyed by NetSuite customers:

- Reduced IT costs

- End-to-end integration of information systems into one comprehensive platform

- Ability to redeploy budgets and personnel to more strategic parts of the business

- Flexibility to add new business partners and divisions anywhere in the world and allow employees to work remotely

- Real-time operational intelligence, easily personalized to individual users who can customize their own pages and reports with minimal training and without IT staff

- The expertise of a vendor who takes care of upgrades and maintenance and can provide iron-

cloud security to protect essential customer and business data

NetSuite is part of the larger trend of Software as a Service (SaaS). In the SaaS model, users no longer have to buy on-premise software like ERP packages. Nor do they have to host their own servers in those all-too-familiar air-conditioned, glassed-in computer rooms. Instead, they can simply purchase a subscription to a software service and access it online. They don't have to maintain their own server rooms, pay huge up-front infrastructure costs, or worry about upgrades. A SaaS customer only needs some computers and an Internet connection. In short, the IT burden shifts from customer to vendor. The SaaS model is growing increasingly popular. One recent study by the research and intelligence firm IDC predicted that nearly 45 percent of U.S. firms will devote at least a quarter of their IT budgets to SaaS applications by 2010. This percentage has doubled in only two years and is projected to accelerate even more. Many companies are migrating to SaaS because this model allows them to pay as they go, buy only what they need, easily scale up or down based on current business needs, and outsource their computing needs to experts. Often, they can reap substantial savings, especially in infrastructure costs. NetSuite is flexible enough to meet the needs of many types of companies. Small businesses can use NetSuite to replace QuickBooks or Peachtree. Large multinational businesses can use NetSuite to replace on-premise ERP systems from vendors like Oracle or SAP and have one system that rolls up data from subsidiaries, automatically converts currency, and calculates local taxes. Throughout this book, you see how NetSuite can be customized to be:

Adaptable: You can adjust your account to fit your habits of doing business. You can customize your business records, forms, and fields — or create new ones from scratch. You also can fine-tune your business flows to harmonize with your company’s operations.

Easy to use: NetSuite emphasizes “click, not code” and drag-and-drop customization. Business employees can easily create their own reports and dashboards — no programmers or analysts required.

Personalized to individual users: NetSuite lets users customize their own dashboard, reminders, and pages.

Durable: All customizations are carried forward during upgrades. Unlike some on-premise enterprise packages, you don’t have to junk or overhaul all your existing customizations.

Verticalized: You can share your customizations with partners. You can reproduce templates and share them with business partners. NetSuite account cloning allows replication and instant access to your specific solution . . . and further customization by partners.

About This Book

This book provides both a comprehensive overview of NetSuite and, in some sections, detailed instructions on specific topics.

NetSuite offers extensive online help. But because the system is so comprehensive, the Help section is necessarily voluminous as well. This book seeks to provide a more succinct, and sometimes lighthearted, summary of NetSuite and share a few tricks and tips along the way. This book takes a layperson's approach. We've tried to make this book accessible and provide examples, not just bore you with dry technical jargon and code. After reading this book, you should have a better handle on how the system works and its unique capabilities, and you will be able to reap more from the NetSuite user guides and help materials.

Custom forms can change your ability to follow the instructions given in this book. The good news is that the help is dynamic, so it tells you how to get to stuff.

This book is suitable for different types of people:

Maybe you're just thinking about becoming a NetSuite customer. Perhaps your company currently has an on-premise ERP system, but you've grown tired of maintaining this system, paying for expensive upgrades, maintenance, and patches, and hosting your own servers. Maybe you're enticed by the promise of cloud computing, which allows you to outsource your computing needs so you can focus your energies on the core products or services that actually distinguish your business. Or maybe you use other cloud-based software (we politely won't mention any names) but are drawn to NetSuite because it lets you do everything in one comprehensive package instead of cobbling together solutions from multiple vendors.