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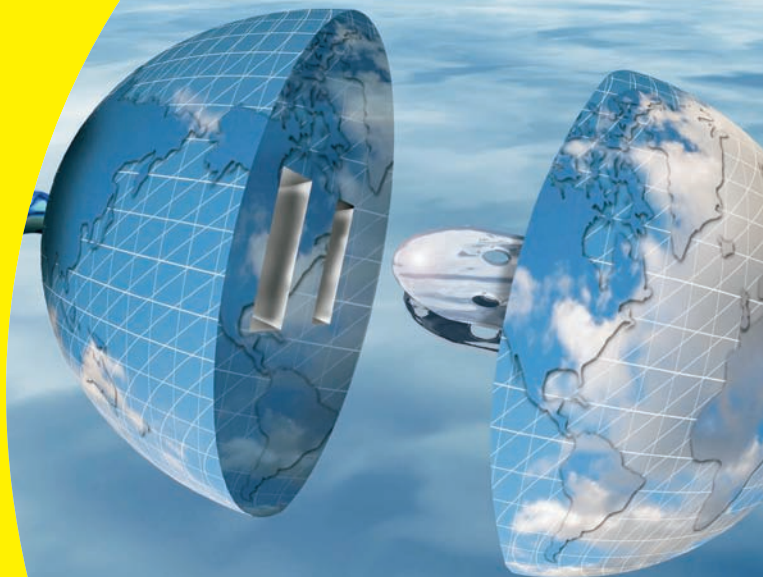
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Julie Kelly
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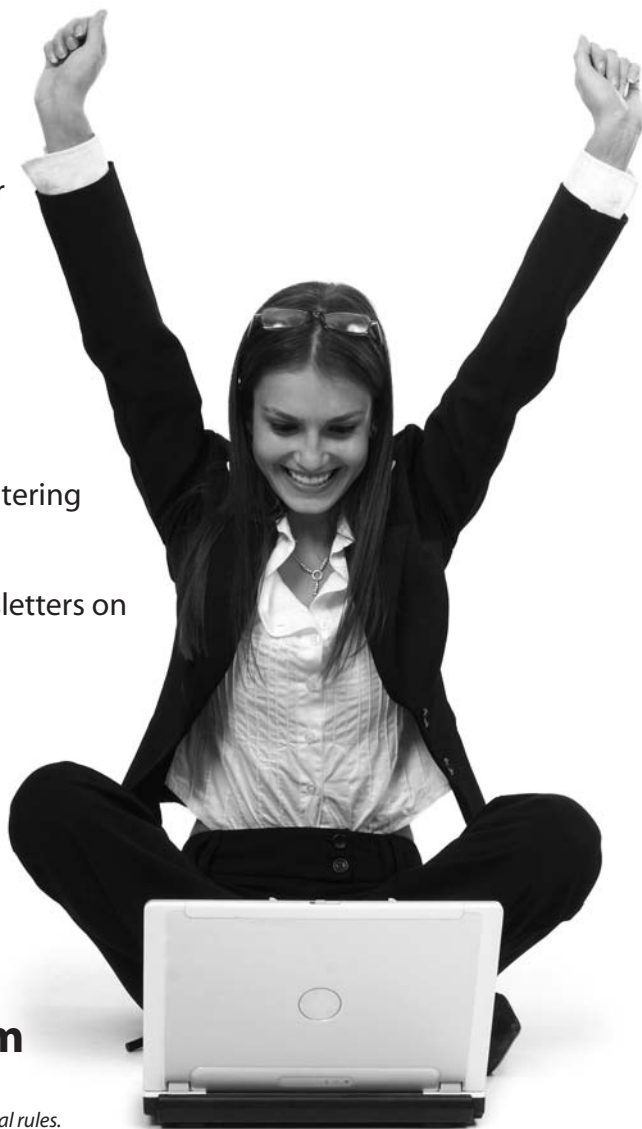
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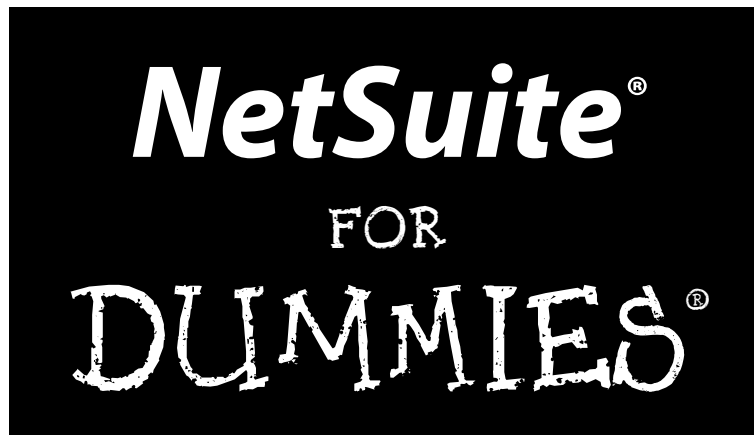
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by Julie Kelly, Luke Braud, and Malin Huffman



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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-clad 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.
- ✔ Maybe you have a NetSuite test account. Even if you've started playing with a demo account, this book will give you more ideas and new tricks and help you make a more informed decision.
- ✔ Maybe you're an existing NetSuite customer who wants to extend your company's use of the product. In this book, you find sections on the important facets of NetSuite, including those you may not fully understand or haven't even tried. Even if you already use NetSuite, this book will help you wring greater value from your IT investment. We wrote this book to be accessible to many levels of people, from technophobes with English degrees to eggheads who dream in code. We hope this guide can be passed around and become the most dog-eared book in your business. Actually, we hope you buy a copy for *everybody* in your company.

Foolish Assumptions

When writing this book we made a few assumptions. If you fit these assumptions, this book is for you:

- ✔ You either use NetSuite or you're thinking about using it.
- ✔ You have some background in common business terms like *profit* and *loss* and common accounting terms such as *general ledger* and *purchase order*. What you don't need is the ability to speak fluent accounting (though we're happy to point out the accounting implications in debit and credit speak at relevant points along the way).

How This Book Is Organized

This book is organized by topics. Everybody should read, or at least skim, Part I, which covers the basics of NetSuite. The rest of the book delves in to more specific topics that may or may not interest you.

You shouldn't feel compelled to read this book in the exact order in which the chapters are numbered. *For Dummies* books are so chapters can stand alone. Skip around, read the chapters relevant to you, and skim or ignore the rest. For example, if you don't ship physical product, you don't need to waste time reading the shipping and fulfillment chapters. Similarly, if you're certain you will never, ever — so help you God — try your hand at coding, you can probably skip the sections on scripting.

Part I: NetSuite Basics

You need a solid foundation in the fundamentals of NetSuite to understand how it can help your company. Part I covers basics such as setup, customization, forms and records, terminology, and personalizing your screens, portals, and dashboards.

Part II: Tracking Money and Resources

We're going out on a limb and assuming your company handles money. Part II shows you how NetSuite can help you track the moola. This section explores bookkeeping, accounting, invoicing, paying bills, and managing inventory.

Part III: Marketing and Driving Sales

This section explores how to attract potential customers. Read this part to know how NetSuite serves as an engine for marketing as well as helping you establish a disciplined and well-organized sales team. This section shows how you can use NetSuite for sales force automation and developing leads into satisfied customers.

Part IV: Taking Care of Your Partners and Customers

Sales comes to its logical conclusion with fulfillment and shipping (if you sell physical products) and project management (if you deliver services).

Partners also often play a role with customers, so this section describes partners as well as how NetSuite can help you provide excellent customer care and help customers help themselves.

Part V: Selling Online

NetSuite can help you set up and host your virtual storefront. This section explains the basics of planning your Web site; creating content; making your pages look sharp; taking online orders; and fine-tuning.

Part VI: Dashboards, Searches, and Analytics

One of the most powerful aspects of NetSuite is its ability to produce real-time business intelligence, from simple at-a-glance dashboards to comprehensive reports that roll up whatever data you desire. This section introduces you to analytics features such as saved searches, key performance indicators for your dashboard, and reporting.

Part VII: The Part of Tens

No *For Dummies* book would be complete without The Part of Tens. In this section, we distill the wisdom of this book into lists of take-home essentials. You find lists of key differentiators, keys for successful implementation, and frequently asked questions.

Bonus Chapters on the Companion Web Site



Meeting the specific needs of *your* business requires that NetSuite be flexible, extensible, and secure. This book's companion Web site, at [**www.dummies.com/go/netsuitefd**](http://www.dummies.com/go/netsuitefd), provides seven jam-packed chapters that address topics ranging from partner relationships (and how to manage them best) to SuiteScript (a JavaScript-based API that extends NetSuite with programming). Other bonus content includes field, tab, and table customization; checkout options; knowledge base setup; and security.

Icons Used in This Book



To help you get the most out of this book, we use icons that tell you, at a glance, if a paragraph has important information of a particular kind.

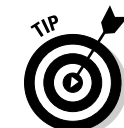
Look out! This is something tricky or unusual or risky to watch for.



This icon marks important NetSuite stuff you should file away in your brain, so don't forget it.



There's more to know about the topics associated with this icon. Check out the book's companion Web site at www.dummies.com/go/netsuitefd.



When you see this icon, you know we're offering advice or shortcuts to quickly improve your understanding of NetSuite and teach you the tricks of the trade.



This icon indicates information that's more technical in nature, and not strictly necessary to read. If technical jargon gives you a headache, feel free to skip these.

Where to Go from Here

Start by reading Part I. Then ask yourself how you may use NetSuite and read the relevant sections.

If you're completely new to NetSuite, head straight to Chapter 1, which will give you an overview of the platform.

If you're a professional in a particular area — such as accounting, sales, marketing, or warehouse management — you can decide to visit chapters in no particular order. But (and we're probably biased) we think the best way forward is by reading Part I. After that, feel free to jump straight to the chapters that call your (professional) name.