

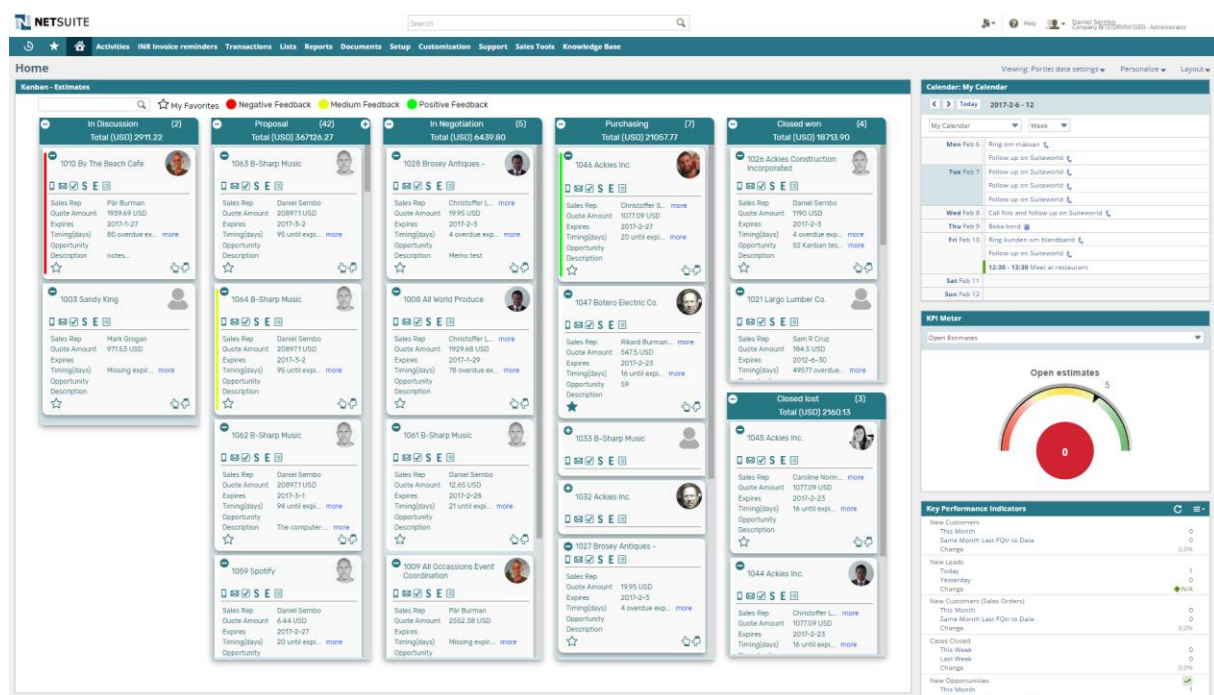
Kanban for NetSuite

- working with Kanbans in NetSuite is a new way of working and a true game changer for user experience.

It will speed up your work by providing a clear overview of your processes, letting you focus on the right thing at the right time. Altvew Kanban for NetSuite comes with prebuilt Kanbans covering processes for CRM, Sales, Project Management and the Support module. Additionally, you can configure your very own Kanbans for your particular business processes.

What is a Kanban board?

Kanban is a way for teams and organizations to visualize their work in different processes. With the Kanban board you get the right overview and can organize and prioritize the work in a unique way. By using drag-and-drop technology with automated updates on the records you are working on it really speeds up your work. And it's fun working with Kanban boards!



The Kanban card

Depending on which Kanban you are using each Kanban card represents either an entity, like Leads, Prospect or Customer, but it can also represent a record for task, phone call, project task or a support case. With the Kanban configuration you can decide which record and what fields you want to display on the Kanban card.

The Kanban column

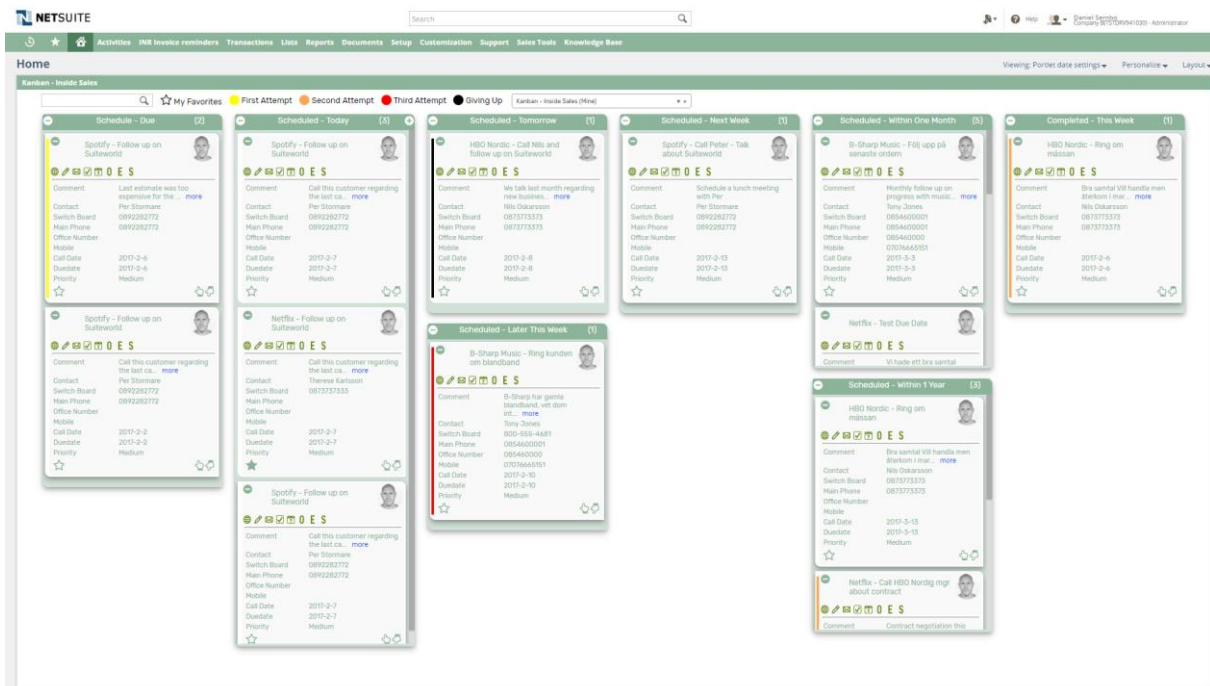
Each column represent a status field on the records you have in the Kanban board.

Just drag and drop the Kanban card to a new column and the status field will automatically be updated. No need for Edit, Change and Save!

The Kanban configuration record

Any administrator or super user with some knowledge of your NetSuite account can modify existing Kanban boards or build new ones without any programming at all. In the configuration record for the Kanban board you decide what fields to display on the Kanban card and which actions to trigger when a user drags a card from one column to another.

It is even possible to trigger a workflow from the Kanban – the possibilities are endless and there are no limits of what you can accomplish with the actions on the Kanban board.



Prospect (50)	Customer (100)
<p>Botero Electric Co.</p> <p>Sales Rep: Rikard Burman Holmgren</p> <p>Category: Primary Contact</p> <p>comment</p> <p>Address: Test Botero Electric Co. 5079 Perri... more (813) 770-0259</p> <p>Phone: Balance .00 Overdue Balance .00 Unbilled Orders .00</p> <p>☆</p>	<p>West Covina Builders Distributors</p> <p>Sales Rep: Daniel Sembo</p> <p>Category: Primary Contact</p> <p>comment</p> <p>Address: Will's Leather Co. Will's Leather Co. 1440-1581 more</p> <p>Phone: Balance .00 Overdue Balance .00 Unbilled Orders .00</p> <p>☆</p>
<p>Will's Leather Co.</p> <p>Sales Rep: Rikard Burman Holmgren</p> <p>Category: Primary Contact</p> <p>comment</p> <p>Address: Will's Leather Co. CA Will's Leather Co. CA 08-3212332</p> <p>Phone: Balance .00 Overdue Balance .00 Unbilled Orders .00</p> <p>☆</p>	<p>Great chance on this one!</p> <p>Will's Leather Co. CA 08-3212332</p> <p>Sales Rep: Daniel Sembo</p> <p>Category: Primary Contact</p> <p>comment</p> <p>Address: Will's Leather Co. Will's Leather Co. 1440-1581 more</p> <p>Phone: Balance .00 Overdue Balance .00 Unbilled Orders .00</p> <p>☆</p>

Customer 360°



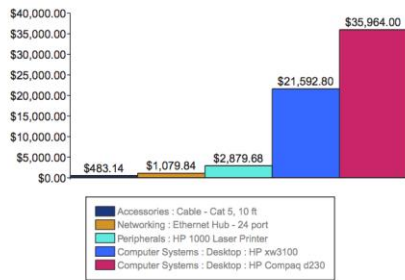
Company	B-Sharp Music	Payment Terms	Net 30
Vat Reg Number		Collection Average	327 days
Email	bsharp@cccatering.com	Sales Rep	Daniel Sernbo
Phone	800-555-4681		

AGING OVERVIEW					
CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	OVER 90 DAYS	TOTAL
16,825.38	16,814.68	-33,629.36		16,814.68	16,825.38

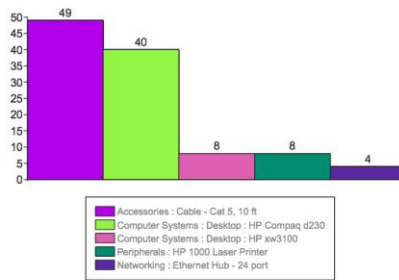
SALES KEY PERFORMANCE INDICATOR					
Indicator	Period	Current	Previous	Change	
Sales	This Fiscal Year vs Last Fiscal Year	46,502.00	15,497.00	200%	1
Unbilled Sales Orders	This Fiscal Year	69,999.98			
Open Estimates (Weighted)	This Fiscal Year	54,876.35			
Open opportunities (Weighted)	This Fiscal Year	1.88			
Forecast vs Actual	Forecast TFY vs Sales LFY	171,380.21	15,497.00	1006%	1

ACTIVITIES KEY PERFORMANCE INDICATOR					
Indicator	Period	Current	Previous	Change	
Completed Phone Calls	This Fiscal Year vs Last Fiscal Year	5	2	150%	1
Completed Events	This Fiscal Year vs Last Fiscal Year	1	0	N/A	1
Total nr of Activities	This Fiscal Year vs Last Fiscal Year	6	2	200%	1

TOP 5 ITEMS BY VALUE - ROLLING 12 MONTHS



TOP 5 ITEMS BY QUANTITY - ROLLING 12 MONTHS



DEFAULT BILLING
B-Sharp Music
1015 Hastings St
San Francisco CA US

DEFAULT SHIPPING
B-Sharp Music
1015 Hastings St
San Francisco CA US

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the Native SuiteApp
Report 360.
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