

# IMPROVING THE USE OF AN ERP SYSTEM IN A SECURITY COMPANY

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Bachelor's Thesis  
May 2012

Degree Programme in Logistics Engineering  
Technology, communication and transport





Author(s) Qin Wanting	Type of publication Bachelor´s Thesis	Date 30/05/2012
	Pages 56+2	Language English
	Confidential ( ) Unit	Permission for web publication ( X )
Title IMPROVING THE USE OF AN ERP SYSTEM IN A SECURITY COMPANY		
Degree Programme Degree Programme in Logistics Engineering		
Tutor(s) Franssila Tommi, Senior Lecturer		
Assigned by ICD Security Solutions Company		
Abstract <p>This thesis is based on the NetSuite system at ICD Security Solutions Company. The aim of this thesis was to research on analyzing the existing problems of the NetSuite system.</p> <p>The main research method applied in this thesis was qualitative research, based on theoretical research, interviewing internal employees and improvement discussion. The description of the operation process of NetSuite system was based on a six-month practical training. A questionnaire comprised seven questions was answered by the internal employees of ICD Company. The background knowledge and the analyzing tools in the study were acquired mainly from literature and internet.</p> <p>Development trend of ERP system in the Chinese business market was described. Then given a study case: ICD Security Solutions Company. ICD Company uses NetSuite system to do their business. The functions of NetSuite system are clearly described. After analyzing and summarizing, there was a big difference between using NetSuite system before and after at ICD Company. This thesis was focused on discussing how to use NetSuite system at ICD Company, it involved the business processes, technical support and implementation NetSuite system. NetSuite system brings some benefits to ICD Company, but it still faces to many challenges. ICD Company needs to improve NetSuite system continually. In the end of this thesis, some suggestions were proposed.</p>		
Keywords ERP system, NetSuite system, SEMs, China		
Miscellaneous		

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## **ABBREVIATIONS**

AR payment	Accounts Receivable payment
B2B	Business To Business
CCW Research	China Computer World Research
COGS	Cost Of Goods Sold
CRM	Customer Relationship Management
ERP system	Enterprise Resource Planning system
ICD	ICD Security Solutions Company
JIT	Just-in-time
MRP	Material Requirements Planning
MRPII	Manufacturing Resource Planning
ROI	Return on Investment
PO	Purchase Order
SO	Sales Order
SMEs	Small and Medium-sized Enterprises
WTO	World Trade Organization

# **1 INTRODUCTION**

## **1.1 Background**

After China's entry into WTO, more and more enterprises have invested in an ERP system; they hoped to gain a sustained competitive advantage because they were faced with the competition environment which was getting more and more intense under the new circumstances. With the rapid development of the enterprise information, the ERP system achieved widespread popularity in the Chinese business market. It was especially favored by the majority of SMEs because they expected to gain more benefits from an ERP system. At the beginning of the phase of the implementation of the ERP system in the Chinese business market, there are still many unsuccessful cases due to failure in implementation. Through the analysis of these unsuccessful cases, enterprises need an in-depth understanding of their business processes and how they can effectively combine it with ERP system. More significantly, enterprises need to understand how to use an ERP system successfully and how to improve the ERP system in every detailed process according to the business situation.

## **1.2 Research Objectives and Research Problems**

This thesis mainly focuses on analyzing and improving the ERP system at ICD Company. The situation of the ERP system in the Chinese business market is also discussed. Through the analysis, this thesis provides some comments and suggestions on how to improve the ERP system and puts forward solutions to solve the existing system problems at ICD Company.

The objectives of this thesis are:

- To describe the benefits of an ERP system
- To understand the features and functions of an NetSuite system
- To have better understanding of the processes of the NetSuite system at ICD

Company

- To describe the challenges faced by ICD Company
- To give recommendations on how to improve the use of the NetSuite system at ICD Company

To achieve these research objectives, answers were to be looked for to the following research questions:

- What is an ERP system?
- Why do the enterprises use an ERP system?
- What is the situation of ERP systems in China?
- How to use the NetSuite system at ICD Company?
- What are the challenges of the NetSuite system at ICD Company?
- How to improve the NetSuite system at ICD Company?

### **1.3 Research Methods**

The main research method applied in this thesis was qualitative research, based on theoretical research, interviewing professionals at ICD Company and improvement discussions.

The literature part of this thesis was conducted by reading scientific articles and studying the theoretical books. The description of the operation process of NetSuite system was based on a six-month practical training experience and the information from the employees of the IT department. In addition, information about the business situation and business processes were provided from presentations and internal documents of ICD Company. A questionnaire comprising of seven questions was send by email to ICD employees. This method saves time and makes it easier to collect feedbacks. The improvement discussions were conducted with the IT manager and IT specialists who were responsible for supporting the NetSuite system at ICD Company.

## **2 LITERATURE REVIEW**

### **2.1 Definition of ERP**

Enterprise resource planning systems are software systems for business management, encompassing modules supporting functional areas such as planning, manufacturing, sales, marketing, distribution, accounting, financial, human resource management, project management, inventory management, service and maintenance, transportation and e-business. The architecture of the software facilitates transparent integration of modules, providing flow of information between all functions within the enterprise in a consistently visible manner. Corporate computing with ERPs allows companies to implement a single integrated system by replacing or re-engineering their mostly incompatible legacy information systems. American Production and Inventory Control Society (2001) has defined ERP systems as “a method for the effective planning and controlling of all the resources needed to take, make, ship and account for customer orders in a manufacturing, distribution or service company.” (Hossain, Patrick, and Rashid 2002, 2)

ERP attempts to integrate all departments and functions across a company onto a single computer system that can serve all those different departments' particular needs. That is a tall order, building a single software program that serves the needs of people in finance as well as answering the needs of the people in human resources and in the warehouse. Each of those departments typically has its own computer system optimized for the particular ways in which the department does its work. (Parthasarthy 2007, 1.)

But ERP combines them all together into a single, integrated software program that runs off a single database so that the various departments can more easily share information and communicate with one another. That integrated approach can have a tremendous payback if companies install the correct software. ERP covers the techniques and concepts employed for the integrated management of businesses as a

whole, from the viewpoint of the effective use of management resources, to improve the efficiency of an enterprise. (Parthasarthy 2007, 1.)

## **2.2 Evolution of ERP**

ERP is a huge management system which is a combination of business processes and information technology. According to Parthasarathy (2007, 9-14), along with continual development of society, there are four main stages in ERP evolution.

### **1) MRP**

With the development of computer systems, it was possible to analyze a lot of data within a short time. In order to meet production planning, the inventory management faced many challenges. In that situation, MRP was put forward to control the inventory in 1960s.

MRP is a software based production planning and inventory control system used to manage manufacturing processes (Parthasarthy 2007, 10). An MRP system helps managers to determine the quantity of products and purchase time of raw materials for the external planning. And for internal planning, it helps the manufacturing department to figure out production time and production quantity. The purpose of an MRP is that the right product is in the right quantity and quality at the right time. And it achieves the forecast as consistent with the real need as possible. It can effectively avoid the unnecessary things to maintain the lowest level of inventory, like stock-out, and backlog.

### **2) Closed-loop MRP**

After several years of development, MRP was continually expanding to more business functions. MRP involves top-down planning. When the planning is executed, it faces the challenges from two sides. One side is related to material problems, for instance, design changes, purchasing items not arriving on time, and waste production. The

other side is capacity problems, such as failure of equipment, staff absence, and lower utilization rate of equipment. When those problems happen, a bottom-up feedback is provided. In addition, it refers to many different plans, such as master production schedule, capacity requirements planning, rough cut capacity planning, and shop floor control. Due to its feedback feature, which is referred to as closing the loop, it was called closed-loop MRP in 1970s.

The process of Closed-loop MRP is divided into three phases: plan-execute-feedback. In short, it is a complete production plan and control system. During this period, Kanban management, total quality control, JIT and other technologies emerged.

### **3) MRPII**

Generally, an enterprise has a lot of systems in their business processes, for instance a production system, a financial system, sales system, supply system, personnel system. However these systems operated independently and lack co-ordination. Around 1980s, MRPII was produced. MRPII is not exclusively a software function, but a marriage of people skills, dedication to data base accuracy, and computer resources. It is a total company management concept for using human resources more productively (Arora 2008, 37).

MRPII helps each department have harmonious relationships, relations between the departments have become closer and they form a whole body. The information can be shared by each department and duplication and overlapping can be eliminated. All information can be freely exchanged and it is easier to operate. In addition, it improves the overall efficiency of the enterprise. In a word, MRPII is an information integration system. At this stage, computer integrated manufacturing system is a representative technique.

The benefits of MRPII:

- Utilize resources reasonably
- Shorten production cycle
- Raise labor productivity

- Decrease inventory
- Improve business management decision
- Decrease faults, reduce economic losses.

#### 4) ERP

Along with the intensive market competition, the enterprises begin more and more to pay attention to the development and utilization of overall resources. ERP was put forward by Gartner Group Inc. in 1990s. ERP is the most advanced enterprise management mode in the world today. It provides an optimize solution for enterprise information-integration. ERP expands more functions of MRP and it is out of the traditional enterprise mode to realize the optimizing of resources. An ERP system is extension software which provides a new platform to adopt the new business functions and adapt to the society's economic development rapidly. The emergence of ERP has brought about a huge effect on controlling all businesses and it has become a core business system in the majority of enterprises.

According to Parthasarathy (2007, 14), a typical ERP application supports cross-functional business processes by linking the following six primary business functions:

- Accounting and Controlling
- HR Management
- Production and Materials Management
- Project Management
- Quality Management and Plant Maintenance
- Sales and Distribution.

ERP involves the integration of the logistics flow, information flow and money flow in order to achieve maximum utilization of enterprise resources and realize the maximum economic benefit. Its core purpose is to achieve integration in supply chain management. An ERP system helps enterprises to operate more effectively and applies more feature-rich collaborative technologies to raise the performance of the business, such as Business-to-consumer, Business-to-business, Business-to-employee and Enterprise Application Integration.

## **2.3 Characteristics of ERP**

ERP is a set of modern enterprise management concept. It is based on a computer information system which can share and utilize the enterprise resources. The information can be fully collated and effectively delivered through an information system. The ERP system emphasizes integrating all data and information into a value business chain.

ERP is an advanced modern enterprise management mode. The purpose is to reasonable distribute all the aspects of resources (including personnel, money, materials, production, supply, sales and other factors), to help enterprises to achieve business success in the fierce market competition and to get more economic benefits. ERP system focuses on modern business management theory and methods. The ERP system is based on MRP II to expand the business scope of enterprise management and design new management architecture to combine the internal and external resources of an organization.

## **2.4 Benefits of ERP**

Installing an ERP system has many direct and indirect advantages. The direct advantages include improved efficiency, information integration for better decision making, faster response time to customer queries, etc. The indirect benefits include a better corporate image, improved customer goodwill, customer satisfaction, etc (Parthasarthy 2007, 2).

The majority of enterprises think that the most prominent advantage is to bring the direct economic benefits from an ERP system. Through the analysis of accuracy information, the top managers can make better decisions to help the company gain competitive advantages. Another advantage is that ERP is an automatic system, some analysis results can be gained, and it reduces a lot manual work.

Integration is the first most important advantage of implementing ERP. The reason why ERP packages are considered to be integrated is the automatic data updation that is possible among the related business components.

The second advantage of ERP packages is their flexibility within the business functions. Different languages, currencies, accounting standards and so on can be covered in one system, and functions that comprehensively manage multiple locations of a company can be packaged and implemented automatically. (Parthasarthy 2007, 2.)

According to Murthy (2008, 250), the following are some of benefits of an ERP system:

- Reduction of lead-time
- Advance the progress of the enterprise standardization
- Improvement in utilization of resources
- Apply innovative thinking to improve business
- Reduce cycle time
- On-time shipment
- Reduction in quality costs.

## **2.5 ERP Limitations**

While the benefits of an ERP system are numerous, there are also some limitations for many enterprises.

One of the biggest problems is the cost for the advanced technology. It is a big investment to implement within every company. Especially, a number of small enterprises do have not the ability to pay for the software fees. Even if they could afford it, the potential cost is still confusing to them. Due to the necessity of maintenance, companies could face higher costs. Using an ERP system involves some other expenses as well, such as configuration fees, testing fees, and customization fees.

The training is an important step to implement an ERP system. The success of the ERP system is dependent on how the employees utilize it. A number of companies do

not have enough money to train their employees, so they are not able to use the ERP system successfully.

Security is also an important problem. Much important information is stored in the ERP system; the IT department needs to maintain and protect sensitive information from leaking, otherwise it brings incalculable damage.

In addition, the implementation time of ERP system is long. The development of the ERP system needs 1-3 years to complete and become fully functional according to the business situation of company. The payback is not realized immediately after the ERP system implementation. It is difficult to measure for companies.

Another problem with ERP system is that it is hard to customize. Modification is needed to suit companies' needs, and this process can be both expensive and tedious. Even when a company does begin changing the system, they are limited in what they can do. (ERP system solution 2010)

## **2.6 Development Trend of ERP in the Chinese Business Market**

CCW Research is a very famous company which is a leader in IT market research and consulting. According to CCW Research (2006), ERP application is more popular in the industries of manufacturing, finance and circulation, as they totally accounted for 77% market share in the second quarter of 2006. Manufacturing was the top one marketplace for ERP applications, accounting for a 56.3% market share with RMB 1514 million.

According to the survey of CCW Research, the statistics show that the market size of ERP software reached up to RMB 2690 million in the second quarter of 2006. It was 22.27% higher than in the same period in 2005. There are four top vendors of ERP software that accounted for a 36% market share in the second quarter of 2006: UFIDA, SAP, Kingdee and ORACLE.

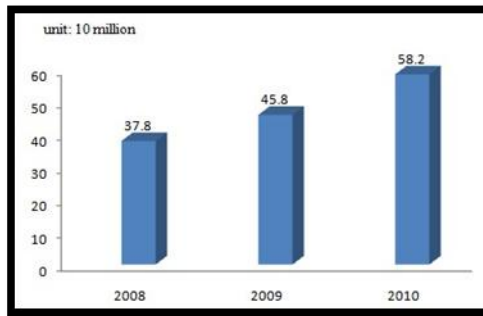


FIGURE 1. The investment of ERP market from 2008 to 2010

The general trend of the Chinese market is upwards. More and more Chinese SMEs are required to use ERP software to do their businesses. In 2010, the investment of ERP market reached RMB 582 million, it increased by nearly 30 percent from the previous. (See Figure 1)

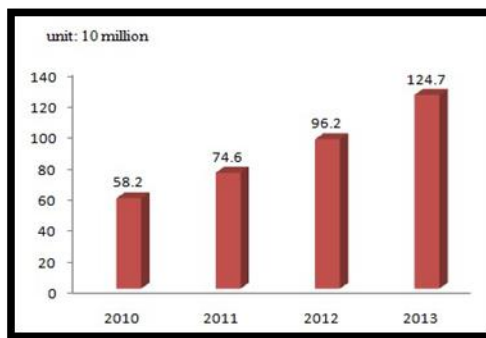


FIGURE 2. The investment of ERP market trend from 2010 to 2013

ERP software plays a more and more important role in the Chinese business market. It promises a great future for China. The overall trend seems to indicate that the ERP market rate will continue to grow in the future. According to the survey of CCW Research, it is expected that the ERP software market will go up to approximately RMB 1200 million in 2013 (See Figure 2). The ERP system will be most widely used in the future.

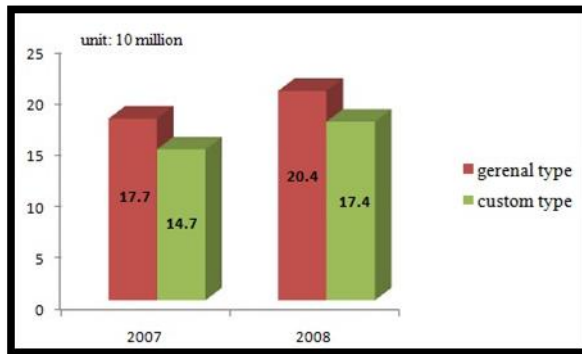


FIGURE 3. The market share of ERP product type from 2007 to 2008

Figure 3 shows an analysis of the market share of ERP product type in China. In 2008, ERP software market reached up to RMB 378 million. The market share of general ERP software was up to 54%, about RMB 204 million, the other one of product portion was about 46% and equal led RMB 174 million. According to CCW Research 2009, the custom type was gradually higher. In other words, more and more enterprises can use an ERP system skillfully, they can quickly adapt to the ERP system and understanding. Moreover, it is necessary for ERP vendors to improve the system further.

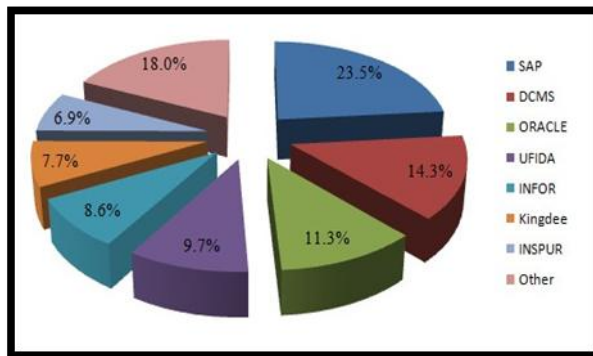


FIGURE 4. The market share of ERP vendors in 2008

The market share of general ERP system reached up to RMB 204 million in 2008. There were many IT vendors to participate in this competition. It included SAP, ORACLE, and INFOR world-class brand vendors. There were also some domestic vendors: UFIDA, Kingdee, and INSPUR. As can be seen from Figure 4, SAP, DCMS and ORACLE were ranked top three among these brands. One of the most popular ERP systems was SAP, which took up 23.5%. Analyzing the market share of

international brand vendors played a key role in Chinese ERP market. But each of ERP vendors has their own specific characteristics. The users should choose an appropriate one according to their own business condition.

### 3 CASE STUDY

#### 3.1 Company Presentation

ICD Security Solutions Company is the leading security systems integrator in Asia Pacific. It was founded in 1999. It is a subsidiary of Brinks' Company. The main area is located in Beijing, China. ICD Company offers professional security system consultation, design, project implementation, service and maintenance on new and existing systems. ICD Company's product experience also extends to every major security product manufacturer in the world, including Panasonic, Sony, HID, GE Security and Lenel. Over the years with the company's development, ICD Company is uniquely suited to provide coverage for multi-facility, multi-site, standardized security systems throughout Asia. It has evolved into an internationally managed enterprise with operations spanning Greater China, Hong Kong and Taiwan, Singapore, Japan, India and USA. Their target clients groups are the world top 500 enterprises in the future. The company has over 220 employees covering 1000 client sites, and the turnover of RMB 40 million in 2011. (ICD Company Annual Meeting Presentation February 2012.)



FIGURE 5. Location of ICD Company

### 3.2 Department Structure

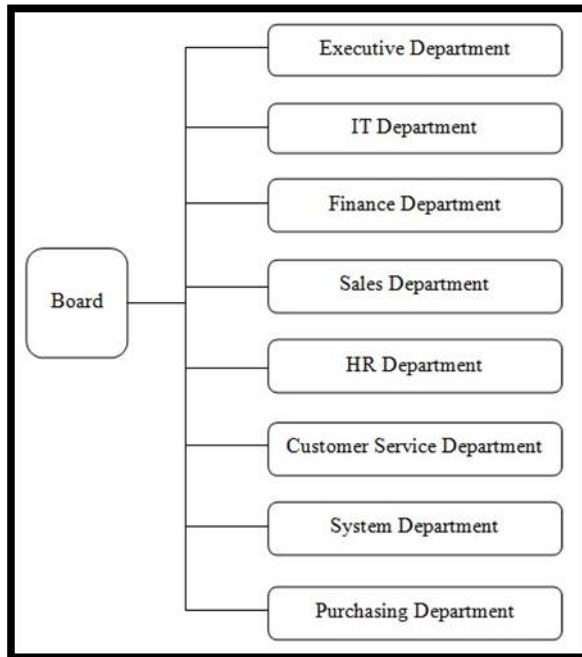


FIGURE 6. Department structure of ICD Company

The departments keep in close contact and cooperation. The ERP system helps every department into one system to complete their business tasks every day. It is a very powerful and indispensable tool which helps departments to complete the whole operation and administration.

### 3.3 Business Overview

ICD Company offers professional security solutions to their customers. Because ICD Company does not have their own products, they have to purchase all kinds of products from their suppliers. ICD Company also provides a better customer service for their customers.

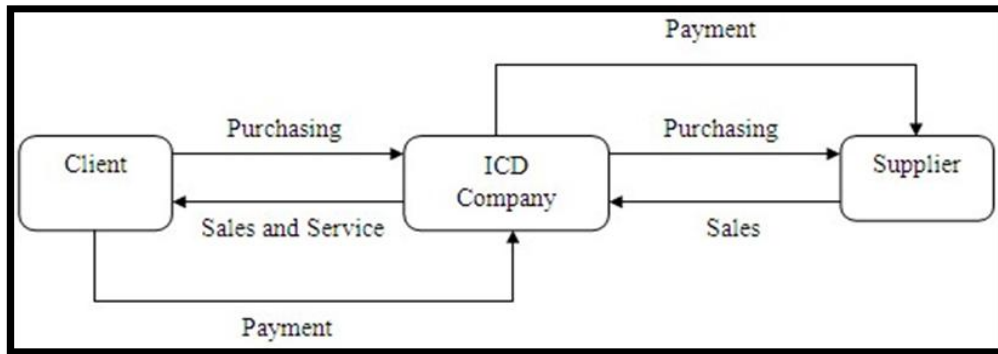


FIGURE 7. Business overview of ICD Company

### Upstream suppliers

ICD Company has many suppliers which have established long-term business cooperation, such as LENEL, SONY, HID.

### Downstream clients

ICD Company divides customers into three different levels of clients groups: key clients, important clients and standard clients. The target client group is World top 500 enterprises, such as Microsoft, Daimler, Oracle, Maersk and ConocoPhillips.

## 3.4 Business Process

There are six steps and methods to implement the comprehensive security solutions for all kinds of projects by ICD Company. According to the professional teams, the solutions will be practical, efficient and affordable. (ICD Corporate Profile 2012)

1. Consultation	2. Design	3. Project & Implementation	4. Testing & Commissioning	5. Comprehensive system administration training	6. Service & Maintenance
Sales Team		System Team		Customer Service Team	

FIGURE 8. Business Process at ICD Company

**Step 1: Consultation**

When ICD Company gets a security project, the sales team takes some actions and makes a good impression on the client. Firstly, the sales team gives a more detailed analysis of the project, which brings out the existing risks and future needs. Secondly, it makes a risk assessment for the existing or planned facility. Thirdly, it learns about the client's security concerns and ideal solutions. Finally, it helps the client define security measures that will address the client's requirements and risks.

**Step 2: Design**

The sales team creates a complete technical architecture of custom security solution. In addition, they prepare a detailed proposal which outlines the specifications and costs of the security solution recommended by ICD Company. Finally, they also provide comprehensive maintenance options to the client after the project has been finished.

**Step 3: Project & Implementation**

From this step, operation is moved over to the system team. Firstly, the sales team introduces the project details to the system team. Secondly, multiple departments coordinate internally in order to deliver the project on-time, on-budget, and according to the highest standard, which involves the purchasing department, finance department, suppliers and laborers. Finally, the project team coordinates efficiently with any outside parties involved in the project and makes sure the project is running smoothly. Thus, effective communication plays a key role in the success of any project.

**Step 4: Testing & Commissioning**

In this step, ICD Company's system team works closely with the project manager of the client side to program the security system according to the client's desired standards.

### **Step 5: Comprehensive System Administration Training**

This step belongs to the customer service team's duties. ICD Company provides training to the staff of a client on the daily administration and operation of the security system. It also provides a comprehensive system documentation, software and hardware warranties, and licenses are presented to the client.

### **Step 6: Service & Maintenance**

The customer service team initiates the annual service and maintenance agreement concerning the project. They provide 24-hour bilingual service and support line to the client, including contact details for the local service office and customer service representative. They also arrange the routine maintenance schedule according to the service and maintenance contract. Still another duty involves the system updates, expansions or alterations during the project service and maintenance period, so the customer service team is responsible for arranging system engineers to complete the services. And also the system engineers need to write reports for their actions in order to let the client know the status and issues of the project and increase the customer satisfaction.

## **3.5 Before Using the NetSuite System**

Before 2005, ICD Company used MS Excel and handwriting to analyze the information and data to conduct their entire business in the past. In fact, Excel possesses many advantages, but it is not a useful tool to complete all business tasks. The information, data and documents cannot be shared with other employees. It was not beneficial to the development of the company for it to work effectively. It also made a negative impact on ICD Company's business due to several reasons in a non-ERP system environment. Firstly, employees had to rely on handwriting or Excel to record. This led to situation where all the information and data could not be shared and it was difficult to analyze. Also it led to duplicate work between different departments. It not only increased the workload but also decreased the working

efficiency. Moreover, when employees wanted to view the project information, it could hardly be found, because of lack of an effective business system. Secondly, the decisions were based on the business data. If the data was not accurate, it led to difficulties in making decisions by executives. Thirdly, for purchasing, the demand forecast did not always give an accurate result in large stocks. Fourthly, it was hard to manage business due to the lack of a professional business system. In a word, before using the NetSuite system, it had no CRM capability, poor data flow, poor reporting and high human error.

## **4 ANALYZING AND IMPROVING THE NETSUITE SYSTEM**

### **4.1 Definition**

NetSuite is a powerful, readily-available system that manages the entire business in one web-based location. Not only is the information able to flow better through the organization as a result from unified accounting/enterprise resource planning to customer relationship management and Web capabilities, but it is possible able to analyze all of this data in real-time and make more rapid, accurate decisions. Sales, support, accounting, purchasing/logistics and billing all use the same information for every interaction because NetSuite is built around a single customer record. (TRIGGER NETWORKS 2012.)

### **4.2 Implementation**

#### **4.2.1 Overview**

ICD Company first implemented NetSuite in 2005. They found NetSuite as a system that helped them to gain more value and benefits. ICD Company already had several subsidiaries, but at that time NetSuite could not support subsidiaries, so in 2008, they upgraded to NetSuite OneWorld, which is a version of the software that allows for subsidiaries. This is important as ICD Company continues to grow and become a global organization, reaching outside of China.

The following sections provide a description concerning NetSuite system was implemented in ICD Company.

### **4.2.2 Planning**

The assessment was fundamental to NetSuite implementation steps. It involved determining whether ICD Company needed introducing the new business system and was ready to make the change from paper records and Excel records to the NetSuite system. The leadership needed to evaluate the current state to select which business system could adapt to the company. The decision also involved managers of different departments. There were many questions that they needed to discuss. The first is to address the existing problems of ICD Company, and the second to understand the benefits of using NetSuite system. Implementation requires planning and analysis, one of the most important steps is make a planning to understand all of business processes.

### **4.2.3 Technical Support**

To protect NestSuite system from malfunction or error, the IT department need to assure the system's normally running through some necessary supplementary work on software and hardware. In order to adapt to changes in the user's business environment, they need to update the original system to meet new requirements. To keep the business running, they also need to solve any issues when the NetSuite system failed.

### **Design**

Once the implementation plan was identified, the IT department needed to understand the application of NetSuite system and developed functional designs. There are some functions that can be customized by technical support. NetSuite is not a specially designed business system for ICD Company, so the IT specialists needed to modify the system and adapted to ICD Company's business processes that can accelerate work efficiency and achieve optimal benefits. For example, because the different departments work in different business areas, there are different interfaces on system by different roles. The IT technician needs to set the system authority on different users from the different departments through programming due to business secrets. Additionally, it is necessary to customize the program to fit company's needs. Some

words were customized and more detailed information was added in every project form in order to improve customers information to have a clear understanding. However, developed functional design has provided convenience for the employees to do their business tasks.

### **Data migration**

The data migration is a critical step, which is to migrate the current data to the NetSuite system. NetSuite is an information system which is focused on data, so employees must be ensured accurate data in NetSuite system. Once the data is correct, NetSuite implementation success rate is high. Thus, it is best to migrate the data manually into NetSuite system though it needs a lot of time and workload.

### **Data security**

Data is very important business information for a company. If a company does not manage the security risks properly, it can be lose its brand image. Thus it is necessary to protect the system through installing powerful security software. Panda Security is an IT security company which has a strong capability to provide antivirus system and set up a firewall system. It establishes a long term business partnership with NetSuite Company.

#### **4.2.4 Training**

Training is a very important phase when a company introduces a new business system. Employees need to have a good training. Once they master the system skills they will be able to perform their jobs by using the NetSuite system. Training is an important way to teach the user how to use the NetSuite system. IT technicians need to give training for employees to make each user's job easier. Each department has different training due to different work areas in different system interfaces on the NetSuite system.

#### **4.2.5 Maintenance**

NetSuite system needs a scheduled maintenance plan to ensure smooth running every day. When ICD Company has some problems with NetSuite system, the IT manager needs to write an issue report and send it to NetSuite Company. According to this report, NetSuite Company can efficiently help ICD Company to update the system running safely and smoothly once a year.

#### **4.2.6 After Using the NetSuite System**

After using the NetSuite system, ICD Company achieves international compliance and improves sales efficiency 50 percent with NetSuite system. NetSuite system provides easy, fast, and accurate tailoring of local tax and VAT rates in each operating region. The sales proposal process time cut in half with NetSuite system. ICD Company smoothly expanded limited accounting staff into full international financial group with NetSuite system capabilities. NetSuite system integrated marketing campaign management improving communications and customer history analysis. It can deploy new territory with full localization in just minutes and manage all aspects of customer engagement, from lead to quotation to project, through integrated NetSuite solution. (NetSuite Inc. Report 1998-2002)

NetSuite system provides high availability. NetSuite system allows for all business processes via online browser functions. This means that anyone in ICD Company can conduct business from anywhere in the world, as long as they can get online. It is a very powerful feature for a small, globally expanding company like ICD Company. With an easily available, global system that shares important information throughout ICD Company, the transaction costs of running a business are remarkably lower, which means that business is conducted more efficiently, and the costs of goods sold to ICD Company's clients are decreased as well. This translates into greater profits.

## 4.3 Functions

### 4.3.1 General

Rather than choosing SAP, ORACLE, which is famous business software in the world, ICD Company chose NetSuite system to manage its business activities, because NetSuite is a huge system which provides all kinds of functions, and also it is cheaper business software.

NetSuite combines ERP, CRM and E-commerce into one single system. And NetSuite system is able to solve business issues through real-time business data. For instance, the sales representative of ICD Company can view customer specific information, such as support cases, projects status and payment issues. It brings more convenience to them and improves their works.

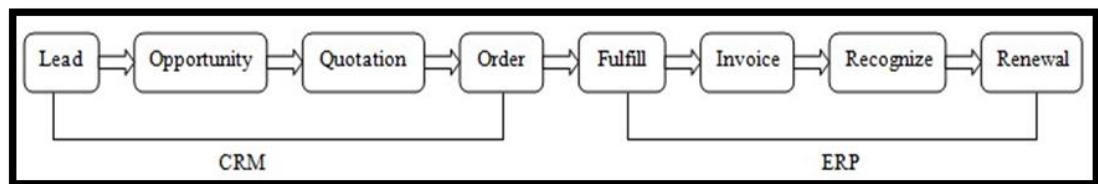


FIGURE 9. General procedure of a project

NetSuite system is the world's NO.1 cloud business management suit, covering marketing automation, sales force automation, order management, financial management and renewals. NetSuite streamlines the complete Lead-To-Cash process providing a seamless flow from the lead to the opportunity to the sales order, through to revenue recognition, invoicing and payment.

Figure 9 shows the general procedure of a project by NetSuite system. The main functions are divided into two aspects for NetSuite system: CRM and ERP. NetSuite CRM consists of three processes: Lead-To-Opportunity process, Opportunity-To-Order process and Order-To-Service process, including marketing automation, opportunity management, sales forecasting, quote and order management, sales

commissions, customer service and renewals. NetSuite ERP consists of four processes: Plan-To-Build, Quote-To-Order, Project-To-Bill and Procure-To-Pay, including purchasing, inventory, manufacturing, fulfillment, billing, projects, payroll, revenue recognition, fixed assets and accounting.

### 4.3.2 Leads Management

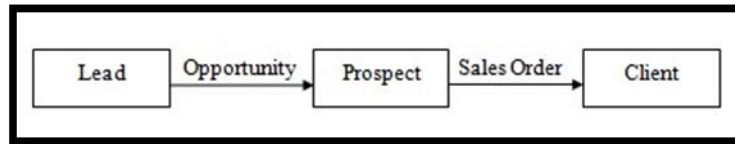


FIGURE 10. Lead conversion workflows

Sales lead is the identification of a potential customer, which is actual business company. This step represents the first stage of a sales process. Leads are the first step in the sales cycle that progresses to prospect and then to customer. Leads are often evaluated through a qualification process that measures the customers' ability and willingness to purchase. Once it is determined that a lead is viable, it is assigned to sales representatives, nurtured through marketing campaigns and contact with sales reps, and converted to a prospect, finally to the client through some business processes based on opportunity and sales order. (NETSUITE HELP CENTER 2012)

Lead management helps to specify roles and responsibilities for everyone engaged in B2B demand generation process (Needles 2011, 136). NetSuite CRM provides all the lead distribution. The sales representatives can track leads effectively, because all the client information can be viewed through lead interface in NetSuite system. If the client information existed in the past, the sales representative can communicate with the employee who is responsible for this customer. It is an easier way to get more detailed information about the customer. Additionally, it is important to build a strong customer relationship in the business market, because it drives business to success and helps to manage business opportunities. And also sale representatives can analyze the ROI by lead source.

### **4.3.3 Opportunity Management**

Creating opportunity is an important business process in the sales cycle, because opportunity means the maximized value of the business project and also indicates the win rate of the project. Opportunity is a good way to understand the sales situation. The sales team's target is to convert all the opportunities into quotes and then sales orders.

NetSuite system can generate a business pipeline that is opportunity information for each project, including project cost, sale margin, gross profit and probability. The sales manager can make a comprehensive analysis of critical data according to pipeline, and also find the weaknesses and strengths of ICD Company's sales team in comparison with the competitors for each individual project. In the end, the sales team can come up with solutions in order to have a chance to win projects as soon as possible through discussion.

### **4.3.4 Quote and Order Management**

Quote and order management plays a key role in sales activities and finance activities. NetSuite order management software is an integrated business process, including quote to order and order to invoice. With NetSuite quote and order management functions, it is convenience to convert quotes into sales orders by the sales team. Then, this sales activity can flow to the finance team which prepares an invoice and waits for revenue recognition.

There are many benefits of quote and order management. (NetSuite Overview)

- Improve quote and order accuracy by including automated tax and shipping-rate calculations.
- Make faster to create professional quote and sales order, also easier to print or e-mail it to client.
- Turn quotes into orders and orders into invoices, and then fulfill those orders, all with one easy-to-use application that eliminates faxes, emails, spreadsheets and late-night phone calls.

- Take control of the quote and order-to-cash process with integrated approvals, discounting policies, pricing and more.
- Accelerate the order confirmation workflow. The quote can be approved online with a click by sales manager and system engineer.
- Accelerate cash flow by integrating every step of the order management process, from quote to cash and fulfillment.
- Monitor orders and manage performance in real time.
- Reduce unnecessary paperwork and errors. With just a click, the quote can be converted into sales order.

#### **4.3.5 Warehouse and Inventory Management**

Inventory management means that an enterprise conducts a comprehensive inventory control and management, which mainly includes adjusting inventory, assessing stock levels, handling back orders and reallocating items. NetSuite system allows employees to check inventory levels, status of purchase orders and stock levels. In addition, tracking a purchase is an important step in maintaining the inventory and keeping the inventory at an optimum level. Using the NetSuite system, employees can monitor real-time information about inventory costs, quantities and asset values. With effective inventory management, the company can reduce costs and maximize revenue and profits. NetSuite system has a strong inventory control capabilities. It can provide all kinds of inventory reports which contribute to making business decisions. It efficiently manages every stage of the product lifecycle and is able to reduce inventory levels and get stronger control of inventory operations.

Additionally, warehouse operators can check out the approved sales order immediately on their own system interface. When a supplier transports goods to ICD Company's warehouse, the warehouse keeper needs to check if the products are good or not. If the products can match with PO and without quality problems, the warehouse keeper needs to mark a symbol in NetSuite system. It means that the PO is fulfilled and other employees can trace the PO through NetSuite system.

**NETSUITE** ICD Security Solutions [IS] ICD Security Solutions sales Assistant | Sign Out Help

Search [ ] Go

Home Activities Box.net Case Leads Opportunities Clients Reports Documents Setup Support

**Sales Back Order Report**

Doc Num	Item	Customer	Ordered	Fulfilled	Back Ordered	On Hand	On Order
10/1/2010	210796SG	MC2850PR1	3	0	3	0	3
10/1/2010	210795SG	MC2850PR1	1	0	1	0	1
[-] SOCN6226							
10/9/2010	410002CN	MC1283SC69PR1	19,700	11,901	3,324	4,475	14,400
10/9/2010	460008CN	MC1283SC69PR1	1,400	1,200	200	120	0
10/9/2010	420001CN	MC1283SC69PR1	12,720	7,931	4,334	2,540	5,795
10/9/2010	440001CN	MC1283SC69PR1	2,400	1,525	875	609	2,135
10/9/2010	410001CN	MC1283SC69PR1	30,300	22,001	6,629	1,670	22,400
[-] SOCN6254							
10/13/2010	510002CN	MC3237PR1	3	0	3	0	0
10/13/2010	170077CN	MC3237PR1	6	0	6	0	0
10/13/2010	110023CN	MC3237PR1	1	0	1	0	0
10/13/2010	130524CN	MC3237PR1	12	1	11	0	0
10/13/2010	150039CN	MC3237PR1	6	0	6	0	0
10/13/2010	160532CN	MC3237PR1	1	0	1	0	0
10/13/2010	160258CN	MC3237PR1	1	0	1	0	0
10/13/2010	160260CN	MC3237PR1	1	0	1	0	0
10/13/2010	210121CN	MC3237PR1	1	0	1	0	0
10/13/2010	710120CN	MC3237PR1	2	0	2	0	0
10/13/2010	120076CN	MC3237PR1	1	0	1	0	0
10/13/2010	160259CN	MC3237PR1	14	0	14	0	0
10/13/2010	160024CN	MC3237PR1	4	0	4	0	0

Date today As of 4/19/2012 Subsidiary Context ICD Limited (Consolidated) More

Refresh Customize Options Print Email Schedule Export - Microsoft Excel

FIGURE 11. Sales back order report at ICD Company

NetSuite system can provide a sales back order report, which is a useful summary report for the purchase department. In the report, the purchasing supervisor can clearly see the inventory levels for each item in project (See Figure 11). It is easier to analyze for each project and it can help to forecast sales of each item. Furthermore, the report can be printed, mailed and exported to Excel by NetSuite system. It has provided the convenience for the employees to use.

#### 4.3.6 Financial Management

NetSuite's accounting is core management software in business. The accounting process is integrated with the company's whole business and the complete order-to-cash and procure-to-pay process. It has many functions to help finance department to manage financial activities. Every payment has its own status which is displayed on the top right of corner on the payment report, so that the sales representative can monitor and follow up the issue. All data and documents are stored in NetSuite system.

NetSuite's accounting management has many advantages, such as:

- Provide comprehensive reports automatically by NetSuite system
- Accelerate financial process and improve work efficiency, for instance, convert sales order into invoice with a click
- Support multiple accounts payable and multi-currency transactions
- Efficient tax management, calculate the taxes and automatically look up the tax codes
- Flexible revenue recognition for sales transactions, it has notification to finance department by NetSuite system when receive the payment from client
- Provide key performance indicators, including sales, income, expenses, profit, income, receivables, etc. It generates automatic diagrams or bar graphs according to these data. It is easier to analyze data and help manager to make decision.

Transaction	Date	Payment Method	Check Number	Amount
<b>Invoice #INVCN8057 - MC34000</b>				
LTD : MC34000PR1				
Invoice	4/6/2012			\$46,675.29
Payment	4/18/2012			(\$46,675.29)
Amount Open - Invoice #INVCN8057 - MC34000				\$0.00
<b>Invoice #INVCN8066 - MC23</b>				
MC23SC2SV2 AMC 2012/03/10 ~ 2013/03/09 (7th Year)				
Invoice	4/6/2012			\$839.85
Payment	4/19/2012			(\$839.85)
Amount Open - Invoice #INVCN8066 - MC23 MC23SC2				\$0.00
<b>Invoice #INVCN8088 - MC746</b>				
Invoice	4/10/2012			\$5,532.55
Payment	4/12/2012			(\$5,532.55)
Amount Open - Invoice #INVCN8088 - MC746 MC746PR13 2011Y Service Components				\$0.00
<b>Invoice #INVCN8089 - MC746</b>				
2011/12/01 ~ 2012/11/30 (9th year)				
Invoice	4/10/2012			\$2,891.12
Payment	4/20/2012			(\$2,891.12)
Amount Open - Invoice #INVCN8089 - MC746				\$0.00

Date this month From 4/1/2012 To 4/30/2012 Subsidiary Context ICD Limited (Consolidated)

Refresh Customize Options Print Email Schedule Export - Microsoft Excel

FIGURE 12. An AR Payment History by Invoice report at ICD Company

The AR payment report is a useful tool. Figure 12 is an AR payment to invoice report which is automatically generated by NetSuite system. It provides a view of the client's payment history, including project name, invoice due date, amount of the project. The report can be exported to Excel, Word, PDF to be saved to computer for analysis. It is an easier way to help the financial manager and sales manager to check which project is late for payment. If the project name is on the list, the financial manager will take action to deal with this problem. For example, they let the sales representative make a call to the customer in order to confirm the time of payment and reason of late payment.

### 4.3.7 Customer Service Management

NetSuite system can give a 360-degree view of the customer accounts, and also it can manage customer contact information in the system interface, including sales history, support cases, order sheet, etc. It helps the sales team to understand deeply, improve customers' satisfaction and establish a long term corporative relationship.

In addition, NetSuite system has a case management function which can assign and manage, customer support cases, emergency assistance, and routine maintenance.

Primary Information	
Case Number	CASE011111
Subject	Troubleshooting -
Assigned CS Team	Support Beijing
Case Reporting Receiver (Email)	
Company	
Status	Closed

Incident Information	
Incident Date	6/7/2011 5:06 pm
Case Type	Troubleshooting
Case Issue	AC_Door Contact
Origin	ICD Staff - System Engineer
Assigned Engineer	Pavel Di
Case Analyse	Natural Case
Case Response Time	24 min
Case Fixed Duration Time	1 hrs 54 min
Case Closed Duration Time	.685
Broken Product Replacement/Repair	
Product Replacement/Repair	
Product Replacement/Repair Price(Cost)	
Currency	
Maintenance Status	MC Silver
Product Warranty Status	No

FIGURE 13. An example of a case report at ICD Company

When the service call center receives a call from ICD Company's client, the telephone operators need to input relevant information to NetSuite system. According to the case report shown in Figure 13, the customer service engineer can get more detailed information, such as the case type, case issue, incident date, company name and address, etc. Also he can decide whether to provide on-site service or telephone guidance according to the issue. If the engineer completes the troubleshooting, he needs to make notes on NetSuite system and the status can be changed to be "closed". It means the case is completed. In NetSuite system, the customer service engineer can write maintenance reports and inspection reports. It is a good way to analyze the existing problems for the customer.

#### **4.3.8 Employee Resource Management**

NetSuite's employee resource management improves employee work efficiency and satisfaction, because it provides employees with self-service online in the employee center, such as expense reports, employee leave reports. For the human resource department, it is easier to find relevant information rapidly, because all human resources tasks and information are recorded in NetSuite system. It contributes to managing employee information online, and saves time in handling human resources tasks, including employee contact information, department, job title, salary, sickness, hire. Additionally, it eliminates manual processes, reduces unnecessary papers/forms and raises the performance of employee management.

ICD Security Solutions [IS] Sign Out Help

Employee Center Employee Leave

Expense Report: List Search Unapproved Expense Reports

Expense Report: ERCN11923 Status: Paid In Full

More Actions

**Input Area**

Employee: [ ] Payment Method and Purpose: cash Class: [ ]  
 Employee(for shared id): [ ] Date: 4/9/2012

**Display Area**

Exp. Rept # ERCN11923 Total Amount 1,047.60 Subsidiary ICD Engineering (BJ)  
 Expenses 1,047.60 Complete  Employee (For Shared ID)  
 VAT Supervisor Approval  Department 12 Sales

Share ID User

Expenses Communication Related Records System Information Box.net

Use Multi Currency

Date	Category	Foreign Amount	Currency	Exchange Rate	Amount	Tax Code	Tax Rate	Memo	Department	Location	Customer:Job	Receipt
2/9/2012	Accessories	32.00	CNY	1.00	32.00				19 Project			Yes

FIGURE 14. An example of an expense report at ICD Company

When an employee enters the employee center, he can create a new expense report and fill in the form correctly, including the payment method, date, class, department, and expense detailed information. The total amount of expense is calculated automatically when he submits the report and also generates an expense number “ERCH11923” (See Figure 14). Additionally, the manager needs to approve this report and mark “OK” in NetSuite system. Then, the report will be transferred to the finance department and it continues to handle the expense task.

#### 4.3.9 Document Management

NetSuite’s document management can help employees manage and publish business documents easily and quickly online. It is a benefit to save time and money for the company. The NetSuite system has enough capability to achieve shared documents.

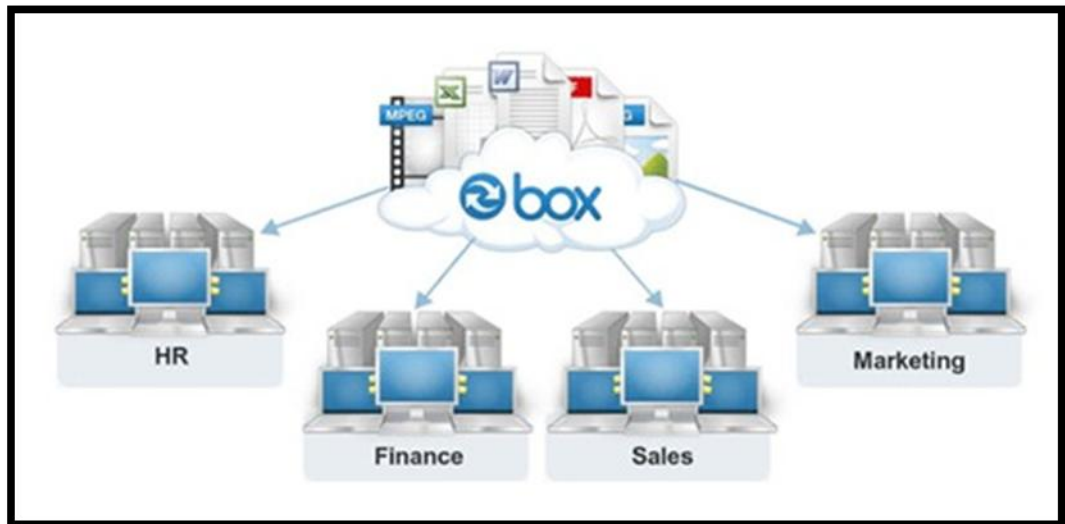


FIGURE 15. The structure of document management at ICD Company (TRIGGER box 2012)

NetSuite's Box tool is a cloud system in which employees can view documents within the system no matter where they are in the world as long as they can get online. In ICD Company, NetSuite system integrates the multiple departments into a single system. All files can be uploaded to Box. When an employee completes a business task, he can upload a variety of files, such as Word, Excel, PowerPoint, Adobe PDF and more. Getting a file link, other employee can check them rapidly when he clicks the link. It is a good tool to share information and improve work efficiency. Box is a safe business environment. IT technicians can set a limit to share different files due to business secrets within different departments. It is a better way to control internal business for corporate data.

#### 4.4 Workflow for Using NetSuite System

NetSuite is ERP/CRM software that ICD Company uses for all of its business processes needs. It holds a massive amount of company data, including records (client and project information, contacts, leads, maintenance cases, etc) and transactions (quotations, invoices, sales orders).

A real case is given as an illustration of how to use NetSuite system in ICD Company. The main source of income is engaged in security projects in ICD Company. The following sections provide descriptions concerning the project cycle in NetSuite system.



FIGURE 16. NetSuite system login interface

Employees have own user names and passwords to log in NetSuite system. The account number is provided by the IT technician through buying the user license from the NetSuite software company.

The screenshot displays the NetSuite homepage for ICD Security Solutions. The user is logged in as 'Sales Assistant'. The interface includes a navigation menu with options like Home, Activities, Box.net, Case, Leads, Opportunities, Clients, Reports, Documents, Setup, and Support. The main content area shows a 'Jobs' table with columns for Sales Rep, Job Location, and Subsidiary. The table lists several job entries with IDs and client names. A search bar at the bottom shows '2011 My Late AR Search' with 'Total Found: 0' and 'No results found'.

Jobs	Sales Rep	Job Location	Subsidiary
	- All -	- All -	- All -
	- Unassigned -	- None -	- None -
	- Mine -	Adelaide	- Mine -
	Aimee Zhang	Australia	- Mine and Descendants -

View: My Client Completed Project | Quick Sort: | From-To: (NONE)(1) | Total Found: 457

ID	Client
MC25PR2	
MC63PR1	
MC63PR2	
MC71SC1PR1	
MC120PR1	
MC83SC2PR1	
MC83SC2PR2	
MC83SC3PR1	
MC83SC3PR2	
MC173PR1	

2011 My Late AR Search:  
 Sales Rep - Mine -  
 Total Found: 0  
 No results found  
 No Search Results Match Your Criteria.

FIGURE 17. Homepage of NetSuite system

After logging in NetSuite system, the user role is in the top right of corner on the screen. On the homepage, the user can customize information and messages through the personalize dashboard in order to make it easier to check business information needed and the interface also raises the work productivity.

### Step 1: Create Leads

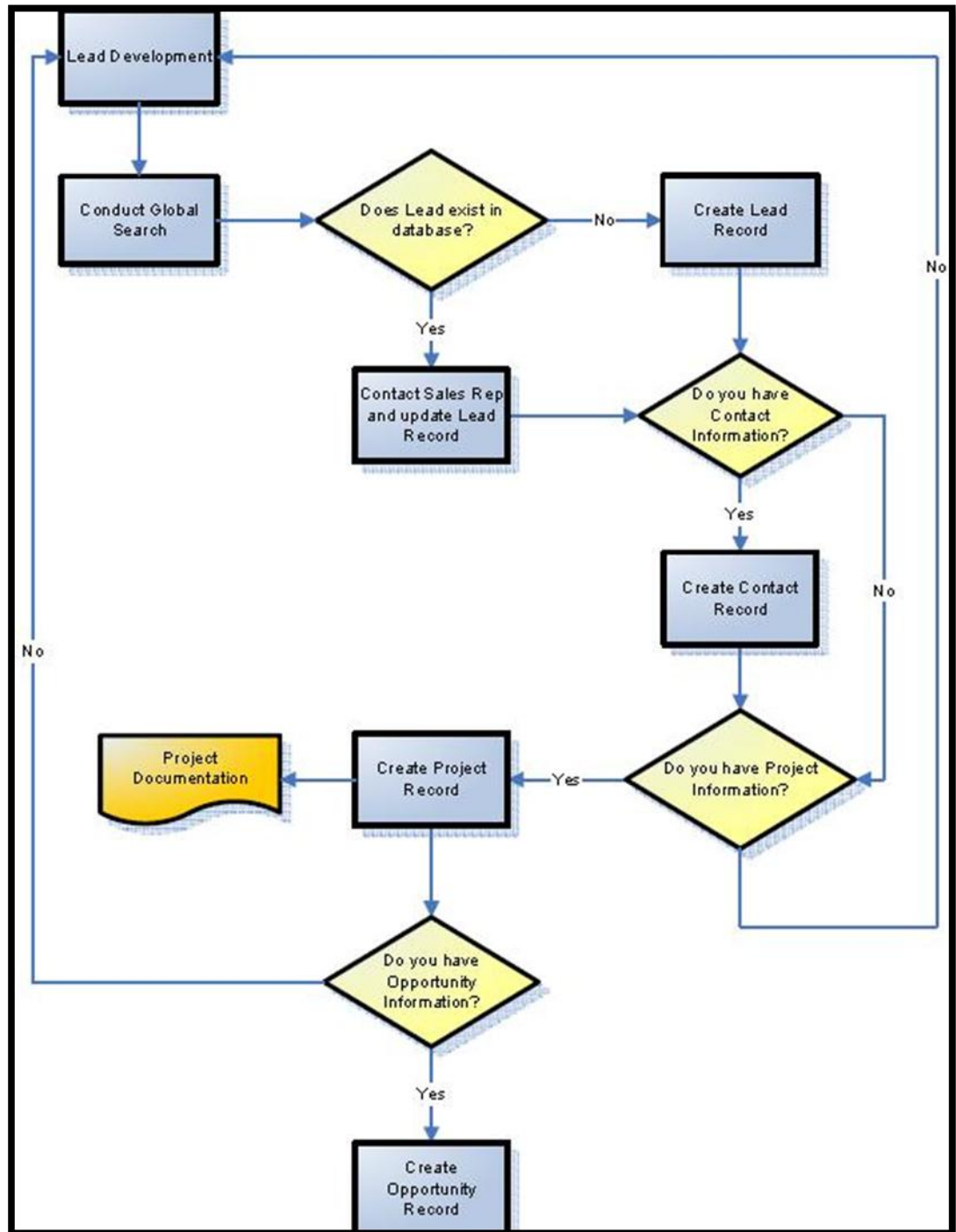


FIGURE 18. The process of lead development at ICD Company

According to the diagram above, the sales representative collects the project information related to kinds of clients who intend to plan the security project through participating in market activities, seminars as well as exhibitions.

The screenshot displays the NetSuite CRM interface for a lead record. The top navigation bar includes the NetSuite logo, the ICD Security Solutions logo, and the user's name 'Sales Assistant' with a 'Sign Out' link. A search bar is located on the right. Below the navigation bar, a menu contains 'Home', 'Activities', 'Box.net', 'Case', 'Leads', 'Opportunities', 'Clients', 'Reports', 'Documents', 'Setup', and 'Support'. The 'Leads' menu is active, showing a 'Lead: List | Search' dropdown. The main content area is titled 'Lead: MC885' and includes an 'Edit' button, a 'Back' button, and a 'More Actions' dropdown. The lead information is organized into several sections:

- Primary Information:** Client ID MC885, Name (blank), Type Company, Company Name Intel, Status LEAD-Unqualified, Sales Rep (blank), Web Address (blank), and Comments (blank).
- Email | Phone | Address:** Email (blank) and Address (blank).
- Classification:** Subsidiary ICD Engineering (BJ), Legacy Code C2611, Lead Source (Department) Sales, Lead Source (Employee) (blank), Client Ranking (CS to Enter) (blank), Mother Client Name (blank), Name in Chinese (blank), Client Relationship (blank), Core Business Technology, Company Name Shortened (blank), and Last Sales Activity (blank).

FIGURE 19. An example of a lead at ICD Company

Once having the new client information, the sales representative can create a “Lead” in NetSuite system. Some information needs to be filled in, including client name, shipping/billing address, project type, project size, project site and location, etc. The lead can be shared with other employees of the sale department. If the lead form is submitted, it can generate a lead number automatically in order to be recognized, such as “MC885” (See Figure 19). The lead status is shown as “LEAD-Unqualified”.

If the sales representative contacts with this client who is responsible for the security of the project and gets more detailed project information, the sales representative can continue to create contact record in lead interface and add necessary information or notes in order to understand for viewers. Lead status is converted to “LEAD-Qualified” manually.

## Step 2: Create Job

After getting project information, sales representative can create a job under the lead layer. If the job form is submitted, it can generate a job number automatically, such as “MC1336SC1339PR1”.

The screenshot displays the NetSuite interface for ICD Security Solutions. The user is logged in as 'Sales Assistant'. The breadcrumb trail is: Home > Activities > Box.net > Case > Leads > Opportunities > Clients > Reports > Documents > Setup > Support. The current page is 'Job: List' with a search bar. The selected job is 'Job: MC1336SC1339PR1 (MC1336SC1339 Daimler Northeast Asia Ltd. - Mother Client ...)'. Below the breadcrumb is a navigation bar with buttons: Edit, Back, Search, and a refresh icon. The main content area is divided into sections: 'Job Information', 'Job Implementation(Engineer Related)', and 'Job Progress'. The 'Job Information' section includes fields for Customer (MC1336SC1339), Job ID (MC1336SC1339PR1), Job Name, Name, Job Type (Project), Sales Rep, Status (Maintenance), Comments, Email, Subsidiary (ICD Engineering (BJ)), and Job Location (Beijing). The 'Job Implementation(Engineer Related)' section includes Project Manager, Site Supervisor, System Engineer(s), Small Project (checkbox), Handover Project Score - Q1 (8), Handover Project Score - Q2 (8), Final Audit Score, Internal Handover Score, and Client's comments on projects. The 'Job Progress' section includes Design & Preparation (Yes), Cabling (Yes), Installation (Yes), T&C (Yes), Handover (Yes), Design & Preparation (Job Start) Date (3/10/2010), Cabling Date (3/18/2010), Installation Date (4/13/2010), T&C Date (4/27/2010), and Handover(Job End) Date (6/13/2010). At the bottom, there is a navigation bar with tabs: Address, Relationships, Financial, Communication, Related Records, Custom, Sub Contractor, System Information, and Resources.

FIGURE 20. An example of Job at ICD Company

Figure 19 shows that a project had been done in 2010. From the job interface, it includes detailed job information, job implementation, job progress and other transactions. All the project information is stored in NetSuite system. It is easier to review and analyze for this project.

## Step 3: Create Opportunity

If the client is interested in ICD Company’s business, it means that ICD Company has an opportunity to participate in bidding, and the sales representative can create “Opportunity Record” under the project in NetSuite system. It is necessary to complete opportunity information. There are four key data in the opportunity form:

probability, projected total, weight total and sales margin. Probability means that the percentage of this project can be won. Projected total means that the value of this project is based on the items selected. And weighted total is calculated automatically by NetSuite system. (Weighted Total = Probability x Projected Total). These data can help the sales manager to make business decisions in the weekly sales meeting. If the form is submitted, it can generate an opportunity number automatically, such as “OPCN5505”. At the same time, lead status is converted to “LEAD-Prospect” automatically.

#### Step 4: Create Quotation

Inventory Item: 150004CN			
<b>More Actions</b>			
<b>Primary Information</b>			
Internal ID	4119	Display Name/Code	
Item Name/Number	150004CN	Vendor Name/Code	
<b>Classification</b>			
Subsidiary	ICD Limited : ICD Engineering (BJ)	Department	Location
	ICD Limited	Class	
	ICD Limited : ICD Engineering (BJ) : ICD Systems (Shanghai) Ltd.		
	<input type="checkbox"/> Include Children		
<b>Manufacturing</b>			
Spec Upload	<input type="checkbox"/>	MPN	Manufacturer Country <b>China</b>
Cost Category		Purchase Price Updated Every(Week/Month)	<b>1 Year</b>
Purchase Price		Rate	<b>2</b>
Import Tax Rate		Reducing cost person	
Import/ Local logistics fee		Date (Base price expiration)	<b>12/31/2012</b>
Exchange Rate for Purchasing		Installation Cost (RMB)	Stock Description <b>CS STOCK/34 .P St</b>
Adding initial price date	<b>1/31/2012</b>	Installation Cost (HKD)	Warranty <b>1.5 Years</b>
Adding item person		Installation Cost (USD)	Lead Time <b>2 weeks</b>
Date (Updated on)	<b>1/31/2012</b>	Installation Cost (INR)	Price Updated By
Initial Price		Installation Cost (SGD)	Item Creator
Latest updating price person			

FIGURE 21. An example of inventory item form at ICD Company

Employees can search any item in the search box by just entering the key word or item number. It is easier to find detailed information for the item needed. As shown in Figure 20, there is a lot of information and data related to Item 150004CN. And it includes the item name, description, purchase price, lead time, basic price expectation, item type, etc. It is very useful to employees to clearly understand the basic information of every item.

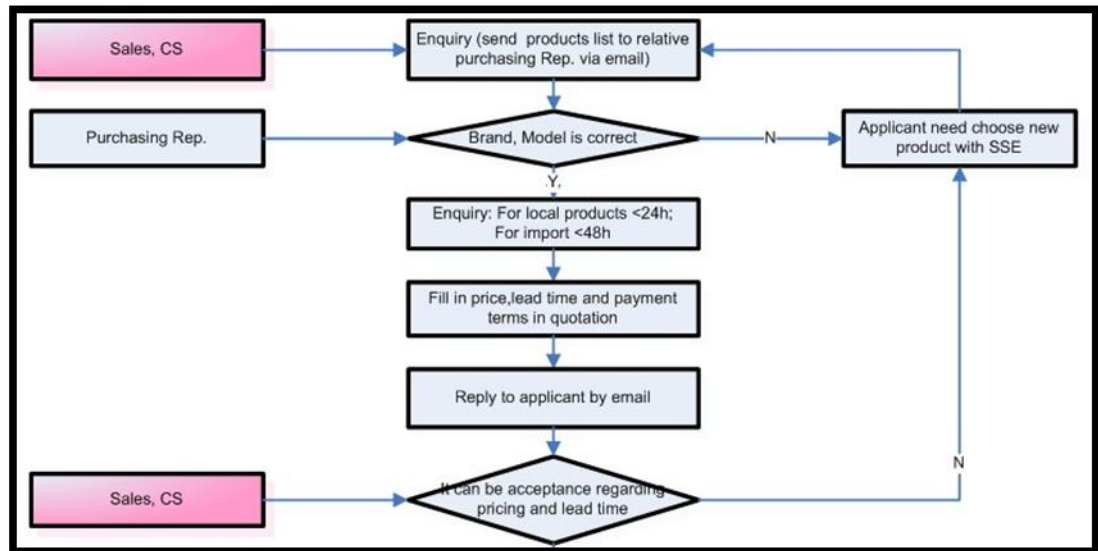


FIGURE 22. Workflow of enquiry

Before making a quotation, the system engineer needs to determine which items are needed for the project. If the item is new, the purchasing supervisor needs to inquire and ask the vendor some more detailed information of the new item, such as price, lead time, discount, etc. If the item is OK, the purchasing supervisor can add the new item and the new vendor into NetSuite system.

Quotation: QUCN5812 [MC1336SC1339PR1]

Sales Information  
 Sales Rep: [redacted] Warehouse: [redacted]  
 Subsidiary: ICD Engineering (BJ)  
 Class: ICD Limited : ICD Engineering : North China : Beijing

Subtotal 415,404.20  
 Discount -7,521.21  
 Tax Total 12,117.01  
 Total 420,000.00

Client Information  
 Client: Job [redacted] Opportunity Job Location [redacted] Local Fapiao Only

Quotation Information  
 Job Type [redacted] Expected Close Date 12/31/2009 Memo  
 Quotation # QUCN5812 Quotation Type [redacted] System Type  
 Date 11/27/2009 Status Won Change Order Reference  
 Due Date 12/26/2009 Probability 100.0%

Quotation Financial Information  
 Payment Terms 50% 50% Net 60 Days Commission Memo First Year AMC Cost  
 I Can Decide  Materials Cost Second Year AMC Cost  
 Value Sub Contractor Cost Technical Support Bonus SSE  
 GP for Sales Outsourced Labor Cost TSB Cost  
 Sales Margin Travel Cost Bank Cost  
 Sales Margin(%) MISC Cost Total Cost ;  
 Commission Rate ICD Engineer Labor Cost Net Profit  
 Commission Amount Engineer Bonus Cost Net Margin  
 Net Margin(%)

Quotation Processing  
 SSE Approval Yes Contract approved by Finance YES Contract Approved by Finance Date 3/11/2010

Items Shipping Billing Accounting Relationships Custom Communication Related Records System Information Box.net

Discount Preferred Discount Rate -7,521.21

Item	Description	Quantity	Price Level	Rate	Amount	Tax Code	Tax Amt	Tax Rate	Gross Amt	Unit Total Cost	Purchase Price
110002CN LeneL LNL-500 Intelligent System Controller	110002CN ** LeneL LNL-500 Intelligent System Controller. Support up to 32 readers or 16 devices; 512 KB onboard memory (12,500 cardholders); Supports up to eight different formats; 12 VAC or 12 VDC, (5 year lithium battery or 3 months full run).	1	Custom								
110001CN LeneL LNL-1320 Dual Reader Interface Module	110001CN ** LeneL LNL-1320 Dual Reader Interface Module. Support Up to 16 different formats (8 card and 8 asset); Reader communications: Clock/Data or Wiegand Data 1/Data0; 12 VAC or 12 VDC, 2 Reader interface, W/M, 8 inputs, 6 (5A) form C relays (more...)	7	Custom								

FIGURE 23. An example of Quotation at ICD Company

According to the customer’s requirements, sales representative needs to create “Quotation” under the layer of opportunity. It has a lot of project information in the quotation form, such as items, price, amounts, warehouse, probability, payment terms, labor cost, travel cost (See Figure 22). When the sales representative enters an item number in the search box, the NetSuite system can automatically generate the relevant information, such as lead time of the item and price. And it can also automatically calculate the amount of items and the total amount. If it is submitted, it can generate a quotation number automatically, such as “QUCN5812”. With the quotation finished, the system engineer needs to check the items and approve this

quotation by a click in NetSuite system. Only if the quotation is approved in NetSuite system, the quotation can continue to the next step.

### Step 5: Create Sale Order

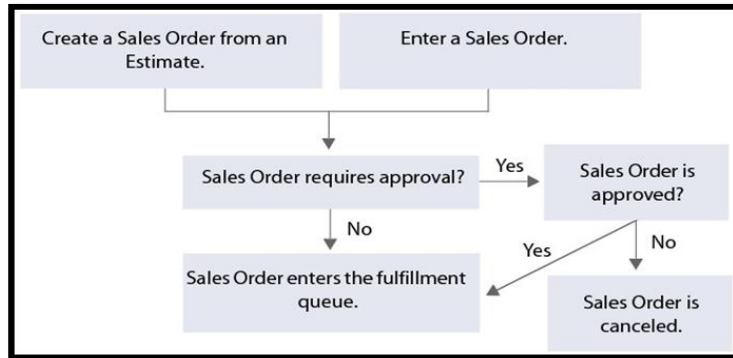


FIGURE 24. Sales order workflow

After the acceptance of quotation by the client, the sales representative needs to make a sales order to the purchasing department. It is very easy to make a SO by NetSuite system. The sales representative just needs to click a button in the quotation form, it can generate a SO report in NetSuite system. If it is submitted, it can generate a SO number automatically, such as “SOCN8150”. The sales order usually requires approval by the operational manager. Then, the sales order enters the fulfillment queue and continues to the next step. Additionally, the sales representative needs to prepare the proposal and project contract. Once the contract is signed, the lead status is converted from “LEAD-Prospect” to “Client” automatically after the financial specialist has been marked in NetSuite system.

### Step 6: Create Purchase Order

All purchasing processes are completed by NetSuite system. After the sales representative completes the quotation, which also is converted to SO, the operational manager needs to make an announcement to the purchase department by e-mail. When the purchasing specialist receives the SO announcement, he can create a purchase order in NetSuite system according to the quotation. When the purchase order is finished, it can generate a PO number automatically, such as “POCN1120”.

Purchasing specialists create purchase orders according to inventory levels by NetSuite system. For example, stock level of item150004CN shows the following:

On Hand	Quality Committed	Preferred Stock	Back Order	On Order
1 A	1 C	2 B	6 D	2 E

FIGURE 25. Stock level example of item 150004CN at ICD Company

A: On Hand (quality in warehouse real time)

B: Preferred Stock level (make backup for project according to experience)

C: Quality Committed (inventory reallocation)

D: Quality Back Order (short of for project,  $D = \text{Quality Demand} - \text{On Hand}$ )

E: Quality On Order (quality on route)

F: Quality Issue PO (finally confirmed quality)

$F = D - E + B$

$\text{PO} = \text{Back Order} - \text{On Order} + \text{Preferred Stock}$

Thus, issue PO as below:

$\text{PO for item150004CN} = 6 - 2 + 2 = 6.$

### Step 7: Receive goods

When the purchasing specialist submits the PO by NetSuite system, the purchasing manager needs to review the detailed PO and decide whether to approve or reject it. If the PO is approved by the manager in NetSuite system, the warehouse keeper can receive PO's notification automatically by NetSuite system. After the products are transported to ICD Company's warehouse, the warehouse keeper should check the quantity, specification, types with the receipt. If the products are OK, he needs to mark "OK" in the PO form by NetSuite system. Simultaneously, the purchasing specialist can receive the feedback in his system interface.

## Step 8: Invoice

**NETSUITE** ICD Security Solutions [IS] ICD Security Solutions - Assistant | Sign Out | Help

Home | Activities | Box.net | Case | Leads | Opportunities | Clients | Reports | Documents | Setup | Support

Invoice: List | Search

Invoice: INVCN3480 (MC62PR7) Status: Paid In Full

Authorize Return | Renew | More Actions

**Primary Information**

Invoice # INVCN3480	Amount Paid 1,650.00	Subtotal 1,567.54 Discount Tax Total 82.46 Total 1,650.00 Amount Due 0.00
Client/Project	Memo 100% full payment for QUCN6526	
Date 5/6/2010		
Due Date 7/5/2010		
Amount Due 0.00		

**Sales Information**

Sales Rep	Opportunity #
-----------	---------------

**Classification**

Subsidiary ICD Engineering (BJ)	Class ICD Limited : ICD Engineering : North	Location Beijing
Department 18 Services	China : Beijing	
Change Order Reference	Project Management Firm	Job Size - Cameras
Referral	Real Estate Agent	Job Size - Doors
Client Payment Terms 100% Net 60 Days	Job Security Level	Client Relationship Existing Client
Client Receival Date	Job Size - Value	Client Credit Ranking
Late AR Reason	Job Size - Square Meters	Fapiao No.
	Facility Type	

Items | Shipping | Billing | Accounting | Relationships | Communication | Related Records | Custom | System Information | Box.net

FIGURE 26. An example of an invoice form at ICD Company

When the project is completed by ICD Company, the financial specialist needs to make invoice to client in NetSuite system. If it is submitted, it can generate an invoice number automatically, such as “INVCN1006”. There is a lot of information related to payment in the form, such as due date, amount paid, client payment terms, billing address (See Figure 25). Especially, the due date of invoice is important information, because it can remind the financial specialist to collect the money for the project.

## Step 9: Payment

NetSuite system provides a more efficient payment acceptance with payment-to-recognition process. It is easier for the customer to do business with ICD Company by accepting a various terms of payment. NetSuite system allows payment by bank: when the customer transfers the payment to ICD Company by bank, NetSuite system can make a notification to the financial specialist; then the financial specialist needs to fulfill the payment in NetSuite system if the money is matched with the invoice, and

also share this information with the sales department in order to let the sales representative know this project is totally completed by NetSuite system.

## 5 SUMMARY OF PROBLEMS

Today, ICD Company can complete business projects successfully by NetSuite system, and also have good business processes, but it still has some problems which have a negative impact for ICD Company. According to the analysis of the internal questionnaire and discussion with the IT manager, the main problems of the current NetSuite system can be clearly summarized as follows:

### **Poor training**

Failure to provide training leads to a high rate of staff turnover, and also to the waste of a lot of time and manpower. In fact, employees often experience problems in performance, which can be avoided by a good training. ICD Company is often only focused on training courses and ignores the training evaluation of the employees. In addition, the method of training is quite inefficient.

### **Technically inflexible**

Because NetSuite system is a "one size fits all" solution, it does many things "OK", but nothing extremely well. If something is not suitable for ICD Company's business processes, it has to improve the system for it to operate.

### **Lack of professional skills**

NetSuite system needs to be updated to meet the current situation development at each stage. But the problem is that ICD Company is short of specialized IT technicians. To support NetSuite system more effectively, IT technicians need to modify or add some information to NetSuite system to help the personnel to do business. But they are not particularly familiar with the business process of other departments. The department managers need to give some explanations for the system problems and put forward new requirements. But IT technicians may not quite understand the point. In addition,

IT technicians have too little communication with other employees. Sometimes IT technicians cannot fully understand the employees' needs exactly. And they do not provide proper solutions for the employees.

### **Update information slowly**

There is a problem with updating the information and data in NetSuite system. For example, the sales employees can find the client information in NetSuite system. But sometimes the sales representatives update information slowly. If a customer changed the phone number, the sales representative should update the contract information of this customer in NetSuite system. If the sales representative is not up to date with the phone number, other employees can share the incorrect client information in NetSuite system. It brings much inconvenience to employees. Another example, sometimes the purchase specialists also update information slowly. They are not up to date with the item latest information. Item information is so important for business. When the sales representatives make quotations, they need to use the item information, such as the lead time, latest price and stocks. If the item information is incorrect, it causes a great impact on the business of ICD Company.

### **Human error**

Human error is also a critical problem. For example, if the employees enter wrong information into the NetSuite system, it can impact business, because the information is shared with other employees, and the other employees use the wrong information to do their business tasks. It makes a negative impact on the business.

## **6 RECOMMENDATIONS**

### **6.1 Suggestion for Training**

NetSuite system is a bit complicated business tool. Training plays a key role in NetSuite implementation for business projects. Thus, training is the first step in implementing NetSuite. It is necessary to make every employee have a good awareness and skills in NetSuite system. And training is major contributor to ensuring that the employees have the essential skill, and that they are familiar with ICD Company's business process to understand their responsibility.

Proper system training is essential to ICD Company and its employees. Training has a variety of forms, such as classroom presentations, task demonstrations, reading self-study books and watching videos. Different departments have different training courses for different business areas, such as the finance team, sales team, customer service team and HR team. The most important thing is to make sure that everyone is trained to do the job in the same way.

A good training makes employees drive the success of the company, it accelerates adoption, quick productivity, and confidence. Training is not only focused on new employees, the old employees also need training regularly, because NetSuite system is updated periodically and new functions are added that they do not know before. ICD Company should not only focus on training but they should also pay attention to the training evaluation of the employees. Emphasizing training quality and eliminating user confusion are the most important things. The result of the interviews with ICD Company's employees showed that some of the employees did not have a good outcome from the training and the training course was not enough for them. Thus, ICD Company should offer more training for employees. And after training, the trainer should test the employees whether they fully understood. There are many ways to examine whether employees have learnt the system skills, such as making question

papers, or hands-on practice exercises. The aims are to consolidate the skills and correct the mistakes immediately.

## **6.2 Suggestions for Technical**

There are five main aspects which need to be improved by the IT department.

- Add new system functions in order to effectively use NetSuite system
- Develop and optimize ICD Company's business processes to integrate better with NetSuite system
- Clean common system junk files as well as repetitive information and invalid documents in order to ensure NetSuite system has enough space to store more data and documents
- Speed the upgrading of uploading and downloading in order to make the work more fluent.

## **6.3 Suggestions for IT Technicians**

Due to lack of professionals, ICD Company should hire more specialized IT technicians to improve the NetSuite system. IT technicians should have effective communication with the employees from different departments to fully understand their needs. Employees are the direct users of NetSuite system, and they are sure to meet with problems when they use NetSuite system. The IT department should make a questionnaire to the users in order to understand the existing system problems and new requirements. On the basis of the answers, IT technicians could provide proper solutions to improve the NetSuite system.

In order to meet ICD Company's requirements, it is a necessary to make NetSuite system suitable for the different departments and the whole organization. The IT department makes better solutions to improve NetSuite system and helps it to operate more successfully. Different customers have different requirements, so how to meet a single customer's needs is a critical issue. IT technicians need to build good relationships and also have good communication with customers face-to-face to

understand their needs clearly.

#### **6.4 Suggestions for Purchase Specialists**

All items are entered into NetSuite system by purchase specialists. The employees can find any item information in NetSuite system, including item description, sales price, purchase price and lead time. Purchase specialists need to ensure that all the item information is available and update items and vendor information regularly in order to make operating smooth.

#### **6.5 Suggestions for Users**

Users should reduce the inaccuracy caused by human operation and avoid performance mistakes. And more importantly, users should have a positive attitude to ensure that the information and data is accurate, only that way an accurate analysis can be made as well as the right decisions through NetSuite system. If employees enter the wrong data, it leads to the wrong information shared by other employees as well. This will eliminate the good effects of NetSuite system.

#### **6.6 Suggestions for Departments**

Keeping the business processes running smoothly between the different departments is necessary. The different departments are closely linked, which means that building good working relationships ensures the smooth progress of projects. In addition, communication should be improved to enhance cooperation between different departments. Also coordination of different departments is essential when employees do projects by NetSuite system.

## 7 CONCLUSIONS

ERP is a powerful business tool which integrates all the departments and functions into a single system. More companies have added even more value and gained profits through using an ERP system. And more and more companies try to adapt the ERP system into their business. But it must be kept in mind that companies have to select the best ERP system for their business.

Each company has some special requirements in their business processes. In order to meet the unique requirements, a company needs to improve its ERP system. Continuous evaluation of ERP must be emphasized and the workflow to achieve maximum benefits and the work to minimize risks must be improved further.

For ICD Company, after starting to use the NetSuite system, it has had some noticeable changes and has also brought a good return. Today, the NetSuite system still has many challenges for ICD Company. In this thesis, it provides some suggestions for the NetSuite system at ICD Company. Through improvements mentioned above, ICD Company will continue to improve and get optimum benefits from the NetSuite system.

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## APPENDICES

### APPENDIX 1. QUESTIONNAIRE IN CHINESE

#### 关于 ICD 公司使用 NetSuite 系统的问卷调查

1. 你所属哪个部门?

\_\_\_\_\_

2. 你经常使用 NetSuite 系统吗? \_\_\_\_\_

- A. 每天使用
- B. 有时会使用, 但不是很频繁
- C. 从不使用

3. 你对 NetSuite 系统的工作流程熟悉? \_\_\_\_\_

- A. 熟悉
- B. 不熟悉
- C. 不确定

4. 您对现在的 NetSuite 系统的评价是什么? \_\_\_\_\_

- A. 很好
- B. 一般
- C. 不好

5. 您满意 IT 部门对您使用 NetSuite 系统时的服务支持吗? \_\_\_\_\_

- A. 满意
- B. 一般
- C. 不满意

6. 您认为目前 NetSuite 系统存在的最大问题是什么? \_\_\_\_\_

- A. 缺乏专业培训
- B. IT 部门的支持
- C. 人为错误
- D. 技术不灵活
- E. 其他

如果您选择其他, 请给予解释说明: . \_\_\_\_\_

7. 您是否有其他关于 NetSuite 系统改进的意见或建议?

\_\_\_\_\_

## APPENDIX 2. QUESTIONNAIRE IN ENGLISH

### Questionnaire about NetSuite system in ICD Company

1. Which departments are you in?

\_\_\_\_\_

2. How often do you use NetSuite system? \_\_\_\_\_

- A. Everyday
- B. Sometimes
- C. Never

3. Are you familiar with NetSuite system processes? \_\_\_\_\_

- A. Yes
- B. No
- C. Not sure

4. How would you evaluate current NetSuite system? \_\_\_\_\_

- A. Good
- B. Fair
- C. Bad

5. Are you satisfied with service by IT department? \_\_\_\_\_

- A. Satisfactory
- B. Adequate
- C. Dissatisfaction

6. What do you consider to be the most serious problem in current NetSuite system?

- A. Lack of training
- B. Insufficient of IT department support
- C. Human error by user
- D. Technically inflexible
- E. Other

If you answered other, please explain: \_\_\_\_\_

7. Do you have any additional comments or ideas to improve current NetSuite system?

\_\_\_\_\_