SuiteSolutions – Dashboard for Software Vertical

Description and Terms of Service

Overview of Functionality

This SuiteSolution provides role specific analytics for the CEO, CFO, Controller and Accountant in a software company. This SuiteSolution allows a way to view their company's performance in real-time.

The dashboards can be configured to display business critical KPIs, and examples of included KPIs are:

• Bookings, Billings, Revenue
• COGS, Gross Margin, EBITDA, Deferred Revenue
• Churn Rate, Churn Revenue
• ARR, MRR, TCV, CAC, LTV, Renewal Rate
• Upcoming Renewals this Quarter
• Open Contracts (Summary & Detailed)

These KPIs are displayed in multiple KPI Scorecards: Financial, Bookings, Customer and SaaS Metrics.

This SuiteSolution includes dashboard tiles which provide KPI displays for business users in the NetSuite Service dashboards via a custom tiles portlet. The appearance of the tile including colors and icons to be used are specified via configuration. The tile can also display Variance, Ratio or Difference by comparing these KPIs to another static or dynamic KPI value. It also includes visual alerts to direct the attention of the users to metrics that do not meet specified thresholds.

This SuiteSolution also includes role-based navigation portlets. The portlets display navigation shortcuts to access common forms and reports in the NetSuite Service. The shortcuts can be grouped by navigation categories, making the display more intuitive and minimizing the clicks to access specific menu items.

Limitations:

1. Sending of e-mail alerts depending on thresholds is not supported.
2. Any edits to KPI scorecards are visible to all users who have display access to that scorecard.
3. Permissions are at a role level, not at a user level.
4. Dashboard Tiles
   a. Only saved searches that can execute within a SuiteScript are accepted in the configuration of these tiles.
   b. Drag and drop of tiles to reorder them in the portlet is not supported.
   c. The URL for drilldown in the link is manually entered by the user and there is no validation for the URL.
5. Navigation Portlets
   a. The URL for drilldown in the link is manually entered by the user and there is no validation for the URL.
   b. There is no user specific control on the portlet content. Edits to the custom records affect all users who have view access to that category.
6. The KPI Scorecards use date ranges and not accounting periods.

Terms of Service:

SuiteSolutions are pre-built offerings used to accelerate the delivery of custom functionality into Customer's account. Any custom configurations or code deployed with SuiteSolutions are not locked and can be further customized in Customer's NetSuite Service account. It is Customer's sole responsibility to review the functionality and limitations enabled by this SuiteSolutions item before procuring. Unless specifically agreed in writing in a separate Statement of Work, SuiteSolutions are not supported, maintained or upgraded by Oracle. In addition, unless otherwise agreed upon in writing pursuant to a Statement of Work, Customer is responsible for all testing and configuration of all SuiteSolutions. SuiteSolutions can only be deployed to the account of the specific Customer that has procured SuiteSolutions. SuiteSolutions are for Customer's internal use only for use with Customer's NetSuite Service account and cannot be re-bundled and/or shared. Customer may continue to use this SuiteSolutions item during the term of its use of the NetSuite Service.

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