NETSUITE HEALTH CHECK

Health Check Report

Sample report, with detailed fix guidance

PREPARED FOR
Sample Group Ltd (fictional company)

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VERSION
1.0 · Sample

66/100	47	14	30 h
Overall health	Findings	Quick wins	Saved a month

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Sample report with fictional data. A full report covers every finding in the same way, with a findings register and a walkthrough.

01 Executive summary

Sample Group Ltd runs NetSuite OneWorld across four subsidiaries. The account is **stable but under-optimised**: core processes work, but revenue recognition, supplier controls and page performance need attention, and month-end relies on manual checks that NetSuite can do automatically. All 47 findings can be fixed with configuration and modest SuiteScript changes; none needs a re-implementation.

66 / 100
Overall health · amber

47
Findings: 9 high · 21 medium · 17 low

14
Quick wins, under 2 weeks each

30 h
Admin time saved a month, after 90 days

Key messages

- **Revenue:** revenue arrangements are missing for 14% of sales orders with kit items, so deferred revenue is understated.
- **Controls:** vendor bank details can be changed without approval, the most common route for supplier payment fraud.
- **Performance:** the sales order page takes 6.8 seconds to load because a script loads a full customer record on every view.
- **Close:** there is no close checklist, and posting periods have been left open for up to two months.
- **Cash and stock:** 412 customer payments are unapplied, and negative inventory is distorting costs at two locations.

Fixing it: the plan at a glance

Stage	Scope	Effort	Outcome
Quick wins weeks 1–2	14 configuration fixes, including the bank-detail control, licences, period locks and negative inventory.	6 days	Controls in place; audit points closed.
Next 90 days weeks 3–12	Revenue settings and regeneration, script and form tuning, cash application rules, 12 further improvements.	15 days	Revenue correct; pages under 2s; close in 5 days.
Roadmap months 4–12	SuiteTax for multi-country VAT, one approval workflow instead of three, reporting refresh.	Scoped separately	Simpler, lower-risk account.

How to read this report

Term	Meaning
High	Financial misstatement, fraud or control risk, or a problem users hit every day. Fix within 30 days.
Medium	Inefficiency or risk that grows over time. Fix within 90 days.
Low	Housekeeping and good practice. Fix when convenient.
Effort	Small: under 1 day. Medium: 1–5 days. Large: more than 5 days. Estimates include testing.

02 Scorecard by area

Each area is scored out of 100 against NetSuite best practice and the way Sample Group actually works. Green is 75 or above, amber 60–74, red below 60.

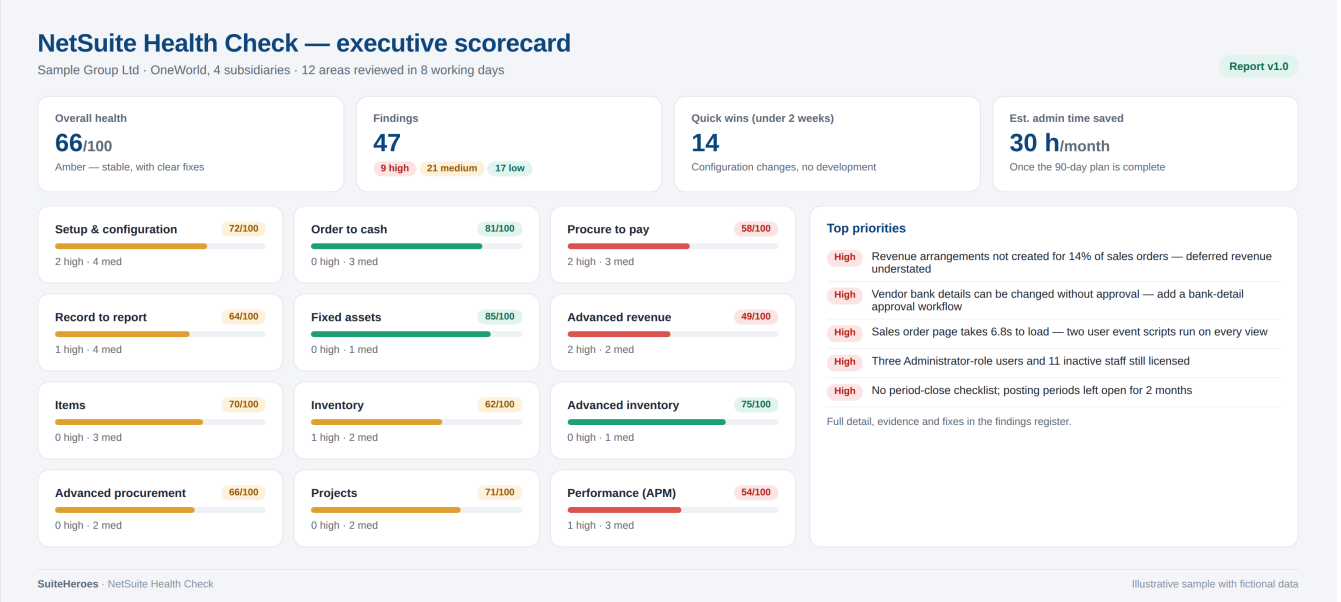


Figure 1 Executive scorecard: one score per area, findings by severity and the top priorities.

Area	Score	Status	Findings (high · medium · low)
Setup & configuration	72/100	Amber	2 · 4 · 3
Order to cash	81/100	Green	0 · 3 · 2
Procure to pay	58/100	Red	2 · 3 · 1
Record to report	64/100	Amber	1 · 4 · 2
Fixed assets	85/100	Green	0 · 1 · 2
Advanced revenue	49/100	Red	2 · 2 · 0
Items	70/100	Amber	0 · 3 · 2
Inventory	62/100	Amber	1 · 2 · 1
Advanced inventory	75/100	Green	0 · 1 · 1
Advanced procurement	66/100	Amber	0 · 2 · 1
Projects	71/100	Amber	0 · 2 · 1
Performance (APM)	54/100	Red	1 · 3 · 1

03 Findings and how to fix them

Six of the 47 findings, shown exactly as they appear in a full report. Each one explains what was found and why it matters, then **how to fix it step by step, how to test the fix, how to undo it if needed, who should own it and how you'll know it worked**. Menu paths are shown as *Setup* > *Accounting* > ….

HC-04 · ADVANCED REVENUE RECOGNITION

Revenue arrangements missing for kit items

Severity	Effort	Estimated time	Suggested owner
High	**Medium**	**3–4 days**	**Financial controller, with NetSuite administrator**

Observation	Revenue arrangements are not created for sales orders that contain kit items, so no revenue plans exist for them.
Evidence	Saved search of sales orders since January without a revenue arrangement: 312 of 2,214 orders (14%), every one containing a kit. Deferred revenue for these orders: £286,400.
Business impact	Deferred revenue is understated, and revenue for these orders is recognised when billed rather than when delivered, which is a risk under IFRS 15.
Root cause	The kit component items were created by CSV import without a revenue recognition rule or forecast rule, so NetSuite has nothing to build a plan from.

HOW TO FIX IT

1. In **sandbox**, run a saved search of kit component items where the revenue recognition rule is empty, and export the list (38 items).
2. On each item, open the *Revenue Recognition / Amortization* subtab and set the **revenue recognition rule** and **forecast rule** (here, "Recognise on fulfilment"), and confirm **Create Revenue Plans On** is set to fulfilment. Use a CSV update for the 38 items rather than editing by hand.
3. Confirm each component carries a standalone selling price in the fair value price list, so allocation across the kit works.
4. Pick five affected sales orders of different kit types. Run *Update Revenue Arrangements and Revenue Plans* for them and check the elements, allocation and plans.
5. When the five are right, process the remaining 307 orders in batches of 50, period by period, oldest first.
6. Reconcile deferred revenue to the balance sheet for each affected period and post any catch-up recognition through the normal revenue recognition journal.
7. Repeat steps 2–6 in **production** in an agreed window, outside the close.
8. Add a saved search alert for any new item created without a revenue recognition rule, so the gap can't reopen.

HOW TO TEST IT

- Five sample orders: arrangement, allocation and plans checked line by line against a manual calculation.
- Deferred revenue balance per subsidiary agrees to the arrangement report after regeneration.
- A new test order with a kit creates its arrangement and plans automatically on fulfilment.

IF IT NEEDS UNDOING

Item settings changed by CSV can be reverted from the exported "before" file. Revenue arrangements created in error can be deleted before any recognition journal posts for them, so the regeneration runs before period close.

DONE WHEN

Every sales order with a kit has a revenue arrangement (0 exceptions in the saved search for two consecutive months) and deferred revenue reconciles to the balance sheet.

HC-11 · PROCURE TO PAY

Vendor bank-detail changes not approved

Severity	Effort	Estimated time	Suggested owner
High	**Small**	**1 day**	**Finance manager (approver); NetSuite administrator (build)**

Observation	Vendor bank details can be edited by six roles, and changes take effect immediately, with no second approval and no alert.
Evidence	System notes show 23 bank-detail changes in the last six months, none checked by a second person. Two were made by users outside Finance.
Business impact	Changed bank details are the most common route for supplier payment fraud, and the missing control will be raised by auditors.
Root cause	When Electronic Bank Payments was set up, edit access to the bank-detail record was given to every finance role, and no approval step was added.

HOW TO FIX IT

1. Restrict edit access to the entity bank-detail record to two roles: in *Setup* > *Users/Roles* > *Manage Roles*, set the custom record permission to **View** for every other role.
2. Add a checkbox field **Bank details approved** and an **Approved by** field to the bank-detail record.
3. Build a workflow on the bank-detail record (*Customization* > *Workflow* > *Workflows* > *New*) that clears the approval on any change to the account fields and routes it to the Finance manager. The full build is in section 6.
4. Exclude vendors with unapproved bank details from payment runs, using the approval field in the payment batch criteria.
5. Create a saved search alert that emails Finance whenever bank details are created or changed (*Saved search* > *Email subtab* > *Send email alerts when records are created/updated*).
6. Ask the bank-detail owners to confirm the 23 historic changes against supplier letters, and record the outcome.

HOW TO TEST IT

- A clerk changes a test vendor's bank details: the record shows not approved, Finance receives the alert, and the vendor drops out of the payment batch.
- The Finance manager approves: the vendor returns to the next payment batch.
- A user without permission cannot edit bank details at all.

IF IT NEEDS UNDOING

Deactivate the workflow and reset role permissions from the exported "before" settings. Nothing in historic transactions changes.

DONE WHEN
No bank detail can be used for payment without a second approval, and every change triggers an alert. The control is evidenced for audit.

HC-17 · PERFORMANCE (APM)

Sales order page takes 6.8 seconds to load

Severity	Effort	Estimated time	Suggested owner
High	**Small**	**1 day**	**NetSuite developer**

Observation	The sales order page takes 6.8 seconds to open on average. A pricing script runs every time an order is viewed and loads the full customer record.
Evidence	APM page time summary, last 30 days: 1,900 views a day; 61% of load time is spent in scripts, 2.9 seconds of it in `customscript_so_ue_pricing`.
Business impact	Sales staff wait about 40 minutes a day each for orders to open, and saves time out at peak times.
Root cause	The script sets the customer's price tier on the order in *beforeLoad*, so it runs on every view and loads the whole customer record to read one field.

HOW TO FIX IT

1. Move the logic from *beforeLoad* to *beforeSubmit*, so it only runs when an order is created or edited, never when it's viewed.
2. Replace the full record load with **search.lookupFields** for the single field needed. The before-and-after code is in section 6.
3. Remove 14 unused fields and two unused subtabs from the sales order entry form (*Customization* > *Forms* > *Entry Forms*).
4. Deploy to sandbox and compare page times in APM against the baseline over three working days.
5. Release to production through the normal deployment, outside month-end, and keep monitoring in APM for two weeks.

HOW TO TEST IT

- Create, edit and copy a sales order for each price tier: the tier field still populates correctly.
- View existing orders: the pricing script no longer appears in the APM script breakdown for views.
- Sales order view time in APM falls below 2 seconds in sandbox.

IF IT NEEDS UNDOING

Redeploy the previous script version from the file cabinet history and restore the form from its saved copy.

DONE WHEN
The sales order view averages under 2 seconds in APM over two weeks, with no change to how prices are set.

HC-22 · RECORD TO REPORT

No close checklist; periods left open

Severity	Effort	Estimated time	Suggested owner
Medium	Small	1 day, then each month-end	Financial controller

Observation	There is no period close checklist, and posting periods stay open for up to two months after period end.
Evidence	Accounting period list: March and April were both open in May, and 41 back-dated transactions were posted to closed months.
Business impact	Reported figures can change after management accounts are issued, and the close takes about 9 working days.
Root cause	Period close was never set up after go-live; periods are closed manually when someone remembers.

HOW TO FIX IT

1. Agree a close calendar with the finance team: AP and AR locked on working day 3, all periods closed by working day 5.
2. Open the period close checklist for the current month (*Setup* > *Accounting* > *Manage Accounting Periods*, then the checklist icon) and walk through each task with the team.
3. Use **Lock A/R** and **Lock A/P** on working day 3, and allow back-dated postings only through the role that has period-override permission.
4. Run foreign currency revaluation and intercompany eliminations from the checklist rather than ad hoc.
5. Close March and April now, after reviewing the 41 back-dated transactions with their owners.
6. Add a dashboard reminder and a saved search of transactions posted to locked periods for the controller.

HOW TO TEST IT

- At the next month-end, a user without override permission cannot post to a locked period.
- The checklist shows every task complete with a date and user.
- The saved search of postings to locked periods returns nothing after working day 5.

IF IT NEEDS UNDOING

Periods can be reopened by the controller if a correction is genuinely needed, and every reopening is logged in system notes.

DONE WHEN

The close finishes by working day 5 for two consecutive months, with no postings to closed periods.

HC-25 · ORDER TO CASH

412 unapplied customer payments

Severity	Effort	Estimated time	Suggested owner
Medium	Medium	2 days, then routine	Credit controller

Observation	412 customer payments and deposits worth £193,700 are recorded but not applied to invoices.
Evidence	Customer payment saved search: 412 payments with an unapplied amount, the oldest 14 months old; AR ageing overstated by the same amount.
Business impact	Customers are chased for invoices they've already paid, ageing is overstated, and credit holds are applied incorrectly.
Root cause	Payments imported from the bank feed are created without applying them, and there are no matching rules to suggest the right invoice.

HOW TO FIX IT

1. Export the 412 payments and match each one to open invoices by amount, reference and customer; most match exactly.
2. Apply exact matches in bulk, then work through the remainder with the credit controller.
3. Set up bank matching rules so imported transactions match on amount and invoice reference automatically (*Transactions* > *Bank* > *Match Bank Data*).
4. Ask customers to quote the invoice number on remittances, and add it to invoice PDFs and statements.
5. Create a weekly saved search of unapplied cash for the credit controller, with a target of zero older than 14 days.

HOW TO TEST IT

- AR ageing before and after: the total falls by the amount applied, and no invoice shows as both paid and open.
- A test bank import with an invoice reference matches and applies automatically.

IF IT NEEDS UNDOING

Applications can be reversed on the payment record; nothing is deleted.

DONE WHEN

Unapplied cash older than 14 days stays at zero for two consecutive months.

HC-31 · INVENTORY

Negative inventory allowed at two locations

Severity	Effort	Estimated time	Suggested owner
Medium	Small	1–2 days	Operations manager, with financial controller

Observation	Negative stock is allowed, and two warehouses carry 63 items below zero.
Evidence	Inventory balance search: 63 item–location combinations below zero, worth -£41,200 at average cost.
Business impact	Average cost is distorted, cost of goods sold is misstated, and stock figures can't be trusted for purchasing.
Root cause	The **Allow negative inventory** preference was switched on during data migration and never switched off.

HOW TO FIX IT

1. Run a stock count at the two locations for the 63 items, and post adjustments for the real quantities.
2. Correct the receipts and fulfilments that were posted in the wrong order, starting with the highest-value items.
3. Switch off **Allow negative inventory** (*Setup* > *Accounting* > *Accounting Preferences* > *Items/Transactions*).
4. Review the cost impact with the controller and post any revaluation needed.

HOW TO TEST IT

- After the change, fulfilling more than the available quantity is blocked with a clear message.
- Inventory valuation agrees to the inventory asset account for both locations.

IF IT NEEDS UNDOING

The preference can be switched back on immediately if fulfilment is blocked unexpectedly, while the cause is fixed.

DONE WHEN

No item–location is below zero, and inventory valuation reconciles to the general ledger.

04 Performance review and tuning plan

Oracle's Application Performance Management (APM) SuiteApp shows where time goes on the busiest pages, scripts and searches. Each slow item has a specific fix and a target.



Figure 2 Performance review from APM: time split by server, script, workflow and client on the busiest pages.

Object	Problem	Fix	Target
Sales order view	6.8s; pricing script on every view	Run on save only; lookupFields; trim form	Under 2s
Invoice create	4.9s; tax script loads records	Replace record loads with lookupFields	Under 2.5s
Dashboard searches	7 searches over 10s, 4 on every dashboard	Add date filters; remove formula criteria; schedule summaries	Under 3s
Nightly sync (Map/Reduce)	92% governance; overruns into 09:00	Split stages; yield earlier; start at 01:00	Done by 06:00
Integration traffic	94% concurrency at 09:00–09:30	Move two batch jobs to off-peak	Under 70%

05 Remediation plan

Fixes are sequenced so that controls and quick wins come first, nothing changes during month-end, and every change is tested in sandbox before production.

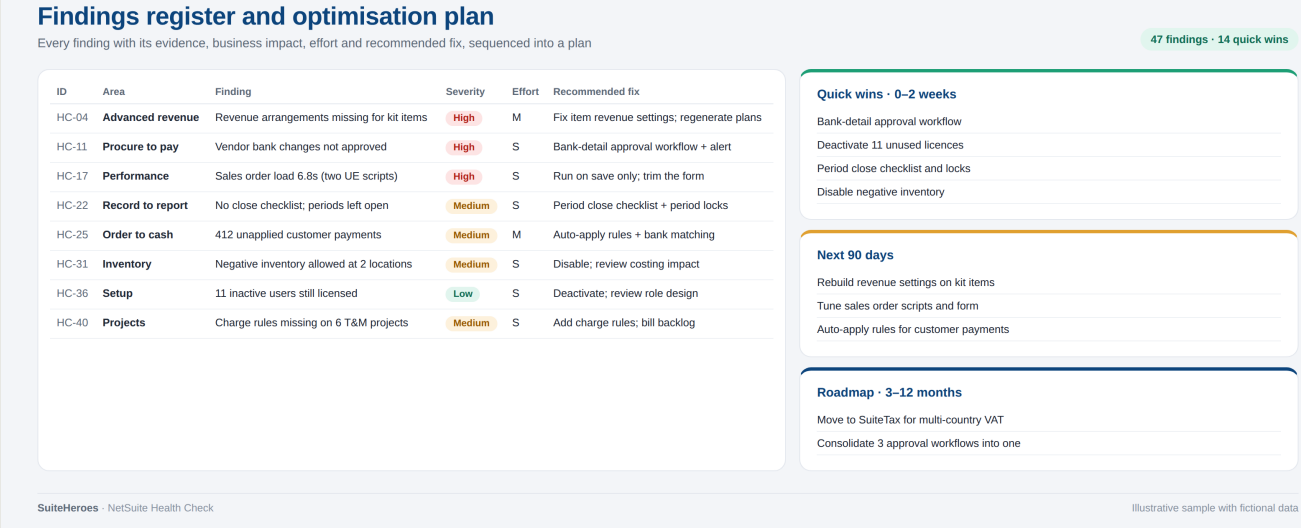


Figure 3 Findings register and optimisation plan, sequenced into quick wins, the next 90 days and the roadmap.

How every fix is delivered

1. **Sandbox first.** Each fix is built and tested in sandbox against the test steps in this report.
2. **User sign-off.** The suggested owner tests the fix in sandbox and signs it off.
3. **Change window.** Changes go to production between working day 6 and the 20th of the month, never during the close.
4. **Release and check.** Changes are released in small batches, and the same tests are repeated in production.
5. **Close the finding.** The findings register is updated with the date, evidence and the "done when" measure.

Twelve-week plan

Weeks	Work	Findings	Effort
1	Bank-detail control; restrict roles; deactivate 11 unused licences; two-factor authentication on finance roles.	HC-11, HC-36, HC-38	2 days
2	Period close checklist and locks; close March and April; switch off negative inventory after the count.	HC-22, HC-31	2 days
3–4	Sales order and invoice script tuning; form trimming; dashboard search tuning.	HC-17, HC-19, HC-20	4 days
5–7	Kit revenue settings, regeneration in sandbox and then production; deferred revenue reconciliation.	HC-04, HC-05	4 days
8–9	Apply the 412 payments; bank matching rules; weekly unapplied-cash search.	HC-25, HC-26	3 days
10–12	Remaining medium findings; integration scheduling; documentation and handover.	12 findings	6 days

Who does what

Role	Responsibilities
Financial controller	Owns the plan and priorities; signs off revenue, close and inventory fixes.
Finance and credit teams	Test fixes in sandbox; apply payments; follow the new close calendar.
NetSuite administrator	Roles, preferences, forms, saved searches and alerts.
SuiteHeroes (if engaged)	Scripts, workflows, revenue regeneration, testing support and the findings register.

How success is measured

Measure	Today	Target after 90 days
Month-end close	9 working days	5 working days
Sales order view time	6.8 seconds	Under 2 seconds
Orders with kits missing revenue arrangements	312 (14%)	0
Unapplied cash older than 14 days	£193,700	£0
Unapproved bank-detail changes	23 in six months	0

06 Fix guides: two worked examples

A full report includes a short fix guide for any finding that needs a build. Here are two.

Guide A · Bank-detail approval workflow (HC-11)

Built on the entity bank-detail record created by Electronic Bank Payments. Time to build and test: about half a day.

1. **Fields.** Add *Bank details approved* (checkbox) and *Approved by* (employee, read-only) to the bank-detail record.
2. **Workflow.** Create a workflow on the bank-detail record that triggers on create and on edit.
3. **State 1, Pending approval.** On entry: clear *Bank details approved*, clear *Approved by*, and send an email to the Finance manager with a link to the record.
4. **Approve button.** Add an *Approve* button visible only to the Finance manager role, and not to the user who made the change.
5. **State 2, Approved.** On the button: set *Bank details approved*, set *Approved by* to the current user, and log the date.
6. **Re-trigger.** Return to state 1 whenever the account number, sort code, IBAN or SWIFT/BIC fields change.
7. **Payment runs.** Add *Bank details approved is true* to the payment batch criteria, so unapproved details can't be paid.
8. **Alert.** Add a saved search alert that emails Finance on every create or change, as a second line of defence.

Guide B · Pricing script tuning (HC-17)

The script sets the customer's price tier on the sales order. Running it on save, and reading just one field, removes almost 3 seconds from every order view. The updated file replaces the old one on the existing deployment, is tested in sandbox against the HC-17 test steps, and is released outside month-end.

Before: runs on every view and loads the full customer record

```
/** @NApiVersion 2.1  @NScriptType UserEventScript */
define(['N/record'], (record) => {
  const beforeLoad = (ctx) => {
    const so = ctx.newRecord;
    const customer = record.load({                      // full record load, on every view
      type: record.Type.CUSTOMER,
      id: so.getValue({ fieldId: 'entity' })
    });
    so.setValue({ fieldId: 'custbody_price_tier',
                  value: customer.getValue({ fieldId: 'custentity_price_tier' }) });
  };
  return { beforeLoad };
});
```

After: runs only when an order is created, copied or edited, and reads one field

```
/** @NApiVersion 2.1  @NScriptType UserEventScript */
define(['N/search'], (search) => {
  const beforeSubmit = (ctx) => {
    const { CREATE, EDIT, COPY } = ctx.UserEventType;
    if (![CREATE, EDIT, COPY].includes(ctx.type)) return;  // never on view
    const so = ctx.newRecord;
    const result = search.lookupFields({                   // one field, no record load
      type: search.Type.CUSTOMER,
      id: so.getValue({ fieldId: 'entity' }),
      columns: ['custentity_price_tier']
    });
    const tier = result.custentity_price_tier;             // select fields return [{ value, text }]
    so.setValue({ fieldId: 'custbody_price_tier',
                  value: Array.isArray(tier) && tier.length ? tier[0].value : '' });
  };
  return { beforeSubmit };
});
```

07 Scope and next steps

Areas reviewed

Set-up and configuration · Order to cash · Procure to pay · Record to report · Fixed assets · Advanced revenue recognition · Items · Inventory · Advanced inventory · Advanced procurement · Projects · Performance with APM · Integrations and customisations.

How the review was done

- Read-only access: nothing in the account was changed during the review.
- Configuration and processes reviewed area by area, with 30-minute conversations with each process owner.
- Every finding checked against the account's own data and evidenced with saved searches, system notes or APM data.

What a full report includes

- Every finding (47 in this example) in the format shown in section 3, including how to fix, test and undo it.
- A findings register as a spreadsheet, ready to assign, track and close.
- The remediation plan, with a fixed price for any work you'd like SuiteHeroes to do.
- Fix guides for any finding that needs a build, like the two in section 6.
- A 60-minute walkthrough with your finance and systems leads, and 30 days of follow-up questions by email.

About SuiteHeroes

SuiteHeroes is an independent NetSuite consultancy in London. Every Health Check is delivered personally by Raja Saqib, a certified NetSuite consultant and CIMA-qualified accountant with more than 15 years of NetSuite implementation, integration and recovery work.

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