

NetSuite Optimization Checklist



Use this checklist to evaluate your NetSuite setup. Each area highlights potential bottlenecks, inefficiencies, or missed opportunities. Optimizing regularly ensures long-term ERP value.

Data Integrity & Cleanup

- ☐ Run scheduled saved searches to flag duplicate records, missing fields, or orphaned transactions.
- ☐ Validate critical data such as customer emails, vendor IDs, and inventory SKUs.
- ☐ Implement deduplication logic using scripts or native tools.

Custom Records & Fields

- ☐ Review all custom records, fields, and forms.
- ☐ Identify which ones are actively used and remove unused ones.
- ☐ Excessive customization introduces noise and degrades performance.
- ☐ A quarterly audit helps keep your system efficient.

Saved Searches & Reports

- ☐ Audit each saved search for relevance and usage.
- ☐ Consolidate overlapping reports, archive stale ones, and simplify logic.
- ☐ Use the Execution Log to identify high-impact searches.
- ☐ Optimize for speed and clarity.

Role Permissions & Access Controls

- ☐ Review all roles against current job functions.
- ☐ Audit for over-permissioning and segregation-of-duties violations.
- ☐ Use NetSuite's Role Audit Trail to ensure access remains auditable and secure.

Dashboards & KPIs

- ☐ Eliminate dashboard clutter.
- ☐ Retain only widgets and KPIs that align with business priorities.
- ☐ Use performance-friendly visuals to support real-time insights and usability.

Script Performance & SuiteScripts

- ☐ Monitor SuiteScript execution using logs and the script queue monitor.
- ☐ Refactor outdated or inefficient scripts.
- ☐ Always test in sandbox before deploying.
- ☐ Well-maintained scripts prevent system slowdowns.

Workflow Automation Efficiency

- ☐ Audit workflows for broken triggers, unused branches, or overcomplexity.
- ☐ Aim for maintainable, performant automation.
- ☐ Clear workflows reduce manual steps and speed up business processes.

Integration Health (APIs, Connectors)

- ☐ Monitor API call volumes and sync errors.
- ☐ Reevaluate whether current integrations still meet business needs.
- ☐ Faulty integrations degrade data quality and efficiency.

Financial Module Configuration

- ☐ Revalidate chart of accounts, fiscal calendars, revenue recognition rules, and posting logic.
- ☐ A clean financial setup supports accurate closes, audits, and forecasting.

Inventory & Supply Chain Setup

- ☐ Audit reorder points, bin locations, lead times, and vendor preferences.
- ☐ Align planning parameters with real-world conditions to improve forecasting and cash flow.

Order-to-Cash Process Optimization

- ☐ Review approval steps, pricing overrides, and fulfillment logic.
- ☐ Eliminate bottlenecks to reduce billing cycles and improve operational efficiency.

Procure-to-Pay Efficiency

- ☐ Clean up vendor data, standardize PO templates, and streamline approval workflows.
- ☐ A lean P2P process improves vendor relationships and throughput.

SuiteAnalytics Usage

- ☐ Audit analytics adoption across teams.
- ☐ Build department-specific workbooks and provide training.
- ☐ Analytics improve visibility without requiring external BI tools.

System Notifications & Alerts

- ☐ Configure alerts for errors, thresholds, and status changes.
- ☐ Set up escalation paths.
- ☐ Avoid alert fatigue, but ensure critical issues are surfaced promptly.

User Training & Documentation

- ☐ Conduct regular training and keep documentation up to date.
- ☐ Host quarterly refreshers—especially after major NetSuite releases.
- ☐ Training ensures adoption and system ROI.