

AI in Action for Accounting Teams

Practical ways to save time and work smarter with NetSuite AI

Agenda

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Agenda

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Built in Features

NetSuite's AI Features

Text Enhance

ng line of well-built
long been a strong
ts, well-known for its
aggressive product
updates this
ore compact form
ing the camera's

Featured Description

This is a camera device.

Item Drilldown Template

Item Display Image

camera_media.jpg

Item Display Thumbnail

Text Enhance

Create and refine content across the suite with generative AI capabilities embedded in NetSuite

Use Cases

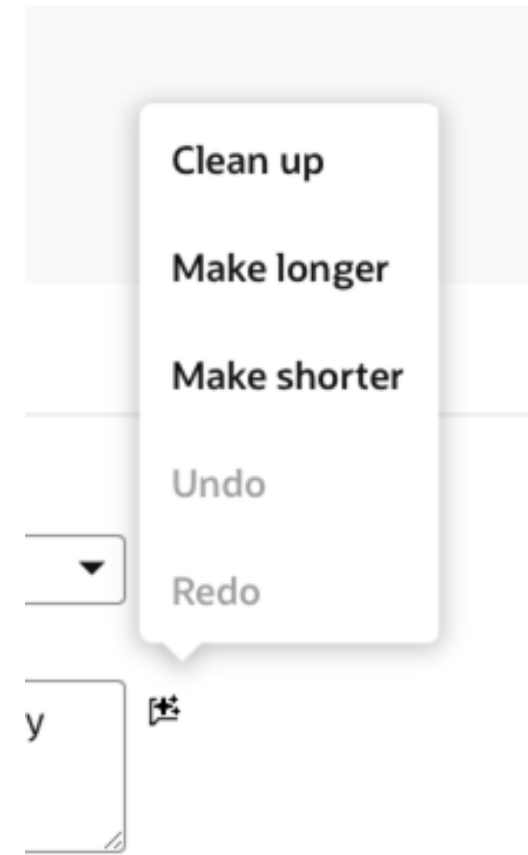
- Item Descriptions
- Sales Order Communications
- Account Descriptions
- Invoice Customer Messages

Benefits

Quickly Create Content

Improve Content

Reduce Time



Prompt Studio

Release Preview

ORACLE NetSuite

Search

Help

Feedback

Ryan Longenecker
Archive - Administrator

ActivitiesTransactionsListsReportsAnalyticsDocumentsSetupCustomizationCommerceSupportField ServicePersonalizeMedia SMS SuiteAppsSales...

Prompt Studio

PromptsText Enhance Actions

Filters

TYPEPROMPT TYPERECORDFIELDLANGUAGELANGUAGE VARIANTACTION

SystemText Enhance

Create PromptDeleteDownload XML

Search by name1 - 20 of 136

	ID	EDIT	NAME	RECORD	FIELD	LANGUAGE	LANGUAGE VARIANT	ACTION	STATUS	LAST UPDATED
<input type="checkbox"/>	-121	Customize	Generate prompt for description on expense item in australian english	Expense Item	Description	English	English (AU)	Generate	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-122	Customize	Generate prompt for description on item group in australian english	Item Group	Description	English	English (AU)	Generate	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-123	Customize	Generate prompt for description on kit item in australian english	Kit/Package	Description	English	English (AU)	Generate	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-124	Customize	Generate prompt for description on markup item in australian english	Markup	Description	English	English (AU)	Generate	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-125	Customize	Generate prompt for description on payment item in australian english	Payment	Description	English	English (AU)	Generate	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-126	Customize	Generic clean up prompt in australian english	All	All	English	English (AU)	Clean up	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-127	Customize	Clean up prompt for goal details in australian english	Goal	Details	English	English (AU)	Clean up	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-128	Customize	Generic make longer prompt in australian english	All	All	English	English (AU)	Make longer	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-129	Customize	Make longer prompt for goal details in australian english	Goal	Details	English	English (AU)	Make longer	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-130	Customize	Generic make shorter prompt in australian english	All	All	English	English (AU)	Make shorter	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-131	Customize	Make shorter prompt for goal details in australian english	Goal	Details	English	English (AU)	Make shorter	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-132	Customize	Generic partial clean up prompt in australian english	All	All	English	English (AU)	Clean up (Partial)	Active	2/26/2025, 7:57:40 PM
<input type="checkbox"/>	-133	Customize	Generate prompt for purchase description on			English	English (AU)		Active	2/26/2025, 7:57:40 PM

Prompt Studio

Manage generative artificial intelligence (AI) prompts and Text Enhance actions in NetSuite

Specifics

- Company Specific Language
- Branding
- Localization
- New company specific prompts

Benefits

Quickly Create Content

Improve Content

Reduce Time



Clean up

Make longer

Make shorter

Marketing Language

Undo

Redo

AI Powered SuiteAnswers

The screenshot displays the SuiteAnswers search interface. At the top, the header includes the SuiteAnswers logo, a hamburger menu, and links for NetSuite Status, Contact Support, Feedback, and a user profile for Ryan. A search bar in the center contains the query "How to update my roles".

On the left side, there is a "Filter" section with "Content Type" and "Categories". Under "Content Type", there are links for Help Topics (8526), How To (7711), General (177), FAQ (62), Release Notes (28), Announcements (28), SuiteWorld Presentations (8), and Video Articles (207). Under "Categories", there are links for Accounting & Tax (1522) and Administration (881).

The main content area shows a search result for "How to update my roles". At the top of the result is a yellow warning box stating: "This summarized content was generated using AI. The information provided may not be entirely error-free or accurate. You should verify it by reviewing the source articles. For more information, see NetSuite Expert in SuiteAnswers." Below this is a "Summary" section with a right-pointing arrow. The summary text reads: "The screenshot below is a sample Customer record with a set of Sales Team. What we will do is to **update** the Sales Roles".

Below the summary, it says "16747 Results". The first result is titled "Update the Sales Rep Roles in Customer Records on the CSV Import". The second result is titled "Update a Custom Role to Access the Employee Directory and Org Browser". The second result's description starts with "Custom role needs permission to access the Employee Directory SuiteApp. Administrator needs to **update** and assign the custom role to the user's department. Updates to Customization".

AI Powered SuiteAnswers

Designed to make your searches more powerful

Specifics

- Summary of information
- Citations and links
- Natural language questions

Benefits

Quick Results

Focused Answer

Reduce Time

More

Bill Capture

- Invoice Scanning
- Data automatically extracted and populated into Bills
- Apply learnings from previous bill entries improves accuracy

Planning and Budgeting

- Automate data analysis to improve and accelerate planning and forecasting cycles.
- Create detailed AI-generated commentary and narratives.

Narrative Reporting

- Part of NetSuite Enterprise Performance Management (EPM)
- Draft detailed narratives and concise explanations from financial and transactional data

Data (Analytics) Warehouse

- Auto Insights
- AI Assistant - Chatbot answers user questions on data patterns by text narratives and visualizations
- Identifies business drivers, contextual insights, and anomalies with a single click.

Custom Features

SuiteScript and N/Ilm Module

SuiteScript

```
tsdrv2316949.app.netsuite.com
))
const yourMessage = context.request.parameters['custpage_hist' + i]
you.defaultValue = yourMessage
you.updateDisplayType({
  displayType: serverWidget.FieldDisplayType.INLINE
})

const chatbot = form.addField({
  id: 'custpage_hist' + (i + 3),
  type: serverWidget.FieldType.TEXTAREA,
  label: 'ChatBot',
  container: 'fieldgroupid'
})
const chatBotMessage =
  context.request.parameters['custpage_hist' + (i + 1)]
chatbot.defaultValue = chatBotMessage
chatbot.updateDisplayType({
  displayType: serverWidget.FieldDisplayType.INLINE
})
chatHistory.push({ role: llm.ChatRole.USER, text: yourMessage })
chatHistory.push({ role: llm.ChatRole.CHATBOT, text: chatBotMessage })
}

const prompt = context.request.parameters.custpage_text
const promptField = form.addField({
  id: 'custpage_hist0',
  type: serverWidget.FieldType.TEXTAREA,
  label: 'You',
  container: 'fieldgroupid'
})
promptField.defaultValue = prompt
promptField.updateDisplayType({
  displayType: serverWidget.FieldDisplayType.INLINE
})
```

N/llm Module

```
1  /**
2  *@NapiVersion 2.1
3  */
4  // This example shows how to query the default LLM
5  require(['N/llm'],
6    function(llm) {
7      const response = llm.generateText({
8        // modelFamily is optional. When omitted, the Cohere Command R mod
9        // To try the Meta Llama model, remove the comment delimiter from
10       // modelFamily: llm.ModelFamily.META_LLAMA,
11       prompt: "Hello World!",
12       modelParameters: {
13         maxTokens: 1000,
14         temperature: 0.2,
15         topK: 3,
16         topP: 0.7,
17         frequencyPenalty: 0.4,
18         presencePenalty: 0
19       }
20     });
21     const responseText = response.text;
22     const remainingUsage = llm.getRemainingFreeUsage(); // View remaining
23   });
```

N/llm Module

Supports generative artificial intelligence (AI) capabilities in SuiteScript

Specifics

- Built in
- Access to Cohere and Meta's Llama
- Clear and direct access
- Examples available

Benefits

Easy Access to AI inside of NetSuite

Free*

Productivity

Customization

N/Ilm Pricing

Free

- Limited usage through NetSuite
- For testing the capabilities
- Resets each month

On Demand

- Unlimited, paid
- Medium quantities
- SuiteApp development
- Pay-as-you-go

Dedicated AI Cluster

- Unlimited, paid
- High quantities



Chatbot

ORACLE NetSuite

Search

Activities Transactions Lists Reports Analytics Documents Setup Customization Commerce Support Field

Chat Bot

Submit

Chat

Prompt

Hello, Tell me about NetSuite



Journal Entry Explainer

Journal

11

Edit

Back

Actions

▼ Primary Information

Entry No.

11

Currency

USA

Exchange Rate

1.00

▼ Classification

Subsidiary

Honeycomb Mfg.

Created From

Date

8/31/2020

Posting Period

Aug 2020

Reversal #

Reversal Date

Memo

Chairs and IT stuff

i

AI JE Summary

This journal entry records the depreciation of furniture and IT equipment. It involves debiting the depreciation expense account and crediting the accumulated depreciation accounts for the respective assets, with the total amount being zero as the debits and credits offset each other. The purpose is to reflect the reduction in value of these assets over time due to wear and tear.

Netgain Accounting
SUMMIT25

19

Sales Order Summary

EFT

Configuration Details

Custom

Field Service

SuiteSocial

Box Files

Salesforce Quote Id (IO)

☐ Send Order as Salesforce Opportunity (IO)

☐ Send Order as Salesforce Order (IO)

Salesforce Opportunity Id (IO)

☐ Salesforce Originated Order (IO)

Salesforce Pricebook Id (IO)

☐ Skip Export to Salesforce Order (IO)

☐ Skip Export to Salesforce Opportunity (IO)

☐ Skip Export to Salesforce Quote (IO)

☐ Send as test record to IO

URL

Upcoming Shipment Detail

SuiteSummary

The provided sales order is a priority one, emphasizing the need for prompt attention. With a two-year duration and a reliable monthly order pattern, the customer seeks a consistent supply of unspecified products.

The order includes shipping and billing addresses, contact details, and payment information. Notably, the customer interaction highlights the significance of communicating with Tom.

Suggested Next Steps:

- Process the order accurately, creating a structured plan for monthly fulfillments.

- Direct communications to Tom, the key contact.

- Verify the order details and confirm the delivery schedule with the customer.

- Ensure a swift execution of the order without delays.

AI Urgency Rating

9

AI Item Suggestions

AI Product Suggestions

AI Suggestions - 2025-03-04T19:15:52.195Z

Edit

Back

Actions

Name

AI Suggestions - 2025-03-04T19:15:52.195Z

☐ Inactive

created date

3/4/2025

source data

suggestions

Here are the top 5 new products based on the provided descriptions:

- HP Dual-Core Telephony Server**: This powerful server is designed for telephony applications and offers advanced features for efficient communication. It could be a great addition for businesses looking to enhance their phone systems.
- Creativo 2400 Motherboard**: Featuring the Superior processor, this motherboard provides excellent performance for gaming or multimedia tasks. It comes with built-in speakers, a scanner, and a color laser printer, making it an all-in-one solution for computing needs.
- Nikon Pix 8.5 Megapixel Digital Camera**: With a 2-inch display and 10X optical zoom, this camera offers exceptional image quality. It's an ideal choice for photographers seeking a compact yet powerful device for capturing high-resolution photos.
- Burley D'Lite Bike Trailer**: A versatile and durable bike trailer perfect for families. It provides a safe and comfortable ride for children, allowing parents to enjoy cycling while transporting their little ones.
- Quickie LX Wheelchair**: Designed for active individuals, this wheelchair offers superior maneuverability and comfort. Its lightweight construction and advanced features make it an excellent choice for those seeking independence and mobility.

These products offer a range of benefits, from enhanced communication systems to advanced photography, family-friendly cycling, and improved accessibility.

AI SMS Summary

[Relationships](#) [Communication](#) [Address](#) [Sales](#) [Marketing](#) [Support](#) [Financial](#) [Preferences](#) [System Information](#) [Custom](#) [Access](#) [Special Instructions](#) [Field Serv](#)

SMS AI Summary

Customer ID 6589 has received a series of SMS messages from MessageMedia. The messages include a request for the customer's parking slot number and store location, a confirmation of an event creation, and multiple invoices for payment. The customer is also informed about a giveaway promotion and is invited to participate by providing their email address. Additionally, the customer receives order details, appointment confirmations, and multiple recurring batch SMS messages.

[Messages](#) [Activities](#) [Events](#) [Tasks](#) [Calls](#) [Files](#) [User Notes](#) [Bulk Merge](#)

View

Default

EmailAttachLetterPDFFaxRefreshView HistoryCustomize View

1 to 25 of 761

#	View	Date	Author	Primary Recipient	Subject	Type	Files	Attachments	Internal Only	Remove
1	View	5/9/2024 12:10 pm	Ryan Longenecker	Ryan Customer	MessageMedia SMS	Email	No		No	Remove
2	View	4/25/2024 10:17 am	Ryan Longenecker	Ryan Customer	MessageMedia SMS	Email	No		No	Remove
3	View	4/25/2024 10:11 am	Ryan Longenecker	Ryan Customer	MessageMedia SMS	Email	No		No	Remove
4	View	4/25/2024 9:16 am	Ryan Longenecker	Ryan Customer	MessageMedia SMS	Email	No		No	Remove
5	View	4/15/2024 12:45 pm	Ryan Longenecker	Ryan Customer	MessageMedia SMS	Email	No		No	Remove
6	View	4/15/2024 12:42 pm	Ryan Longenecker	Ryan Customer	MessageMedia SMS	Email	No		No	Remove
7	View	4/15/2024 12:31 pm	Ryan Longenecker	Ryan Customer	MessageMedia SMS	Email	No		No	Remove

AI New Lead Summary

AI Lead Summary

It appears that this lead has provided minimal information, with only their contact details and no additional message. Here are some next steps and insights to consider for further engagement:

- Reach out via email: Given the provided contact email, it would be advisable to send an initial email to introduce yourself and your services/products. You can keep the email concise and professional, offering a brief overview of what you have to offer and how it might benefit CMT.
- Phone call: With the phone number provided, a follow-up call could be an effective strategy. Sometimes, a personal connection made over the phone can help build rapport and encourage engagement. Ensure you have a clear and prepared script for the call, focusing on the benefits of your offering and how it can add value to CMT's operations.
- Research CMT: Before reaching out, it's beneficial to conduct some research on Collective Mind Technologies (CMT). Understanding their business, products, or services, as well as any recent developments or challenges they might be facing, can help you tailor your approach and demonstrate a genuine interest in their success.
- Offer a personalized solution: Based on your research, try to identify a specific pain point or challenge that CMT might be experiencing and offer a tailored solution. This shows that you've taken the time to understand their needs and are not just sending out generic sales pitches.

DEMO

Netgain **Accounting**
SUMMIT25

Q&A

Netgain **Accounting**
SUMMIT25

Thank you



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Ryan@collectivemindtechnologies.com

Let's Connect



**Scan the QR code to share your
thoughts on the session**



What would you use AI for?

Kahoot App