ISSUE | CLIENT REQUIREMENTS

The client wants to implement the Quality Management Bundle to effectively process and record Quality Assurance data and associate data to other business records in their NetSuite environment.

They also have specific requirements around the processing of items inspection:

a. Inspections needs to be done in a specific location regardless of where the items were received
b. A quality inspection is needed for 'first time received' items - for every vendor.

SOLUTION DESIGN | IMPLEMENTATION

- **Installed and Configure Quality Management Bundle**
- **Created Quality Management records and associated them to item records**
- **Designed and created customizations for additional business requirements:**

a. Developed scripts that:
- Automatically updated location value on Item receipts if items on them has Quality specification context record that requires quality inspection in a particular location
- Added a Quality Specification Context record to the item immediately after creation
- Added a new vendor or a certain type to the same Quality Specification Context record as above
- Removed vendor from Quality Specification Context record after a purchase and receipt has been made to the applicable vendor and the item purchased was already inspected.

BENEFITS ACHIEVED

✓ Client was able to use Quality management application to process, record, and report inspection records and Data Quality records in NetSuite directly associated with the items records and transactions.

✓ By utilizing the customization designed, the customer was able to restrict the Inspection process to a designated location, which aligns with their actual physical inspection of products. This reduces manual work of performing additional transfer of items when item receipts are created from a different location that is not setup for inspection.

✓ This customization automated the creation of Quality specification records for newly created items and recognized the need for inspection when the items are purchased from a Vendor for the first time. This prevents user error and accidentally missing inspections for newly acquired items from Vendors, which improves their quality assurance process.

KW Global Solutions

ISSUE | CLIENT REQUIREMENTS

The client's operational process involves placing orders via phone, email, or website for plastic and metal embroidery hoops manufactured by the company, with assemblies having multifaceted layers, a combination of in-house manufacturing, outsourcing, and purchasing of completed components, where the majority of SKUs are assembled just before shipping, known as "Autobuild," with the mechanism initiated by the creation of a tracking label in ShipStation that subsequently updates NetSuite.

The client requirements involve the necessity for final assemblies to be automatically constructed prior to shipping and to set-up each auto build layer as an assembly item to track accurate costs, unlike kits where COGS are tied to components.

SOLUTION DESIGN | IMPLEMENTATION

Autobuild Assembly Creation
When an autobuild assembly is added to a Sales Order, it now triggers a Special Work Order (WO).

Component Availability Check
A script checks if the required components for each subassembly are in stock. If stock is available, it commits the quantity; if not, it converts the component to a Phantom item for that WO.

Subassembly Processing
The script continues this process through all assembly layers, preparing for the top assembly build.

ShipStation and NetSuite Integration
ShipStation sends a signal to NetSuite when a tracking package is created for the order. NetSuite uses this signal to convert the WO to an Assembly Build, making stock for the top assembly available.

Item Fulfillment
At a scheduled time, ShipStation sends another signal to NetSuite, triggering Item Fulfillments with a "shipped" status for the Sales Order.

BENEFITS ACHIEVED

With the customization and scripting development, the client was able to have an efficient process and was able to perform the following:

- ✓ Seamless Autobuild Process and layered automation
- ✓ Real time stock checks
- ✓ Accurate cost tracking
- ✓ Fulfillment automation thru ShipStation pulls right triggers daily
- ✓ Converting unavailable components to Phantom items, maintaining production flow even with 86 issues.
- ✓ Support processing of high-volume ordering/ peak period fulfillments.

KW Global Solutions

ISSUE | CLIENT REQUIREMENTS

The client sells new and used large vehicles such as Gas trailers, LPG trailers, and asphalts. There is a challenge on tracking the trailer's lifetime from the moment it is purchased and all services done to said item.

The client would like to track purchase of new trailers along with any enhancement added to the trucks and incorporate the cost as part of item cost, incorporate cost of services for its repair, track repair sales coming to the service center whether bought from company or from another truck/trailer company and have an ability to compute for sales and excise tax.

SOLUTION DESIGN | IMPLEMENTATION

- Both inventory and assembly items were setup. Inventory items for the new/used trailer prior to any repairs and assembly items for the the trailer plus either outside or inside service.
- Created work order for every trailer being serviced whether it as new, used or for repair.
- Carried out the Assembly build process once all service were done to the vehicle.
- Created an item group to include additional charges for the purchase of vehicle such as title, processing, excise tax, etc. This is due to the need to compute sales tax and excise tax.
- Created a custom script for the computation of sales tax and excise tax.

BENEFITS ACHIEVED

The solution allowed the client to be able to track the purchase of new trailers and any enhancements made to the trucks. Also provided the ability to incorporate these costs into the item cost, monitor the purchase of used trailers (including the cost of repair services), keep a record of repair sales for trucks serviced at the center, (whether bought from the company or another truck/trailer business), and have the capability to calculate sales and excise taxes.

KW Global Solutions

ISSUE | CLIENT REQUIREMENTS

The client operates as a textile wholesaler, acquires large raw fabric sizes, and processes these through "slitting" to create various sizes for retail, striving to reduce scrap.

The client has requirements to include a seamless transformation of raw fabric into different SKUs efficiently, ensure accurate cost allocation among the output sizes, and implement effective scrap management by tracking scrap quantity and estimated costs for future decisions on selling or writing off the scrap.

SOLUTION DESIGN | IMPLEMENTATION

Process Designed and Configuration Implemented:

Raw Fabric as Assembly Item:
- Treated raw fabric as a purchasable assembly item.
- Set up a Bill of Material (BOM) to include each size output and scrap as components.

Tracking Units:
- Assigned a quantity of 1 for each component in the BOM.
- Used a unit of measure (UOM) table to convert the raw fabric into the required sizes.

Processing
- Received the raw fabric through a standard purchase order (PO).
- When slitting was done, unbuild the assembly to record the output quantities of each size and scrap.

BENEFITS ACHIEVED

The solution allowed the client to be able to efficiently do the following:

- ✓ Convert raw fabric into smaller sizes
- ✓ Automatically allocate costs across all sizes
- ✓ Track scrap quantity and cost for better decisions
- ✓ Ensure accurate size conversions and records
- ✓ Minimize waste and maximize material use

KW Global Solutions

ISSUE | CLIENT REQUIREMENTS

The client provides outsourced labor for biochemical and medical supplement companies, and it stores client inventory in its own facility. It also manufactures and fulfills finished products for clients, charging a labor fee per completed unit.

They would like to achieve the following:

1. Receive client inventory into stock without impacting financials.
2. Track and report inventory movement and quantities for warehouse and production management.
3. Deplete finished products and operationally bill the client for the labor charges associated with manufacturing the product.

SOLUTION DESIGN | IMPLEMENTATION

- Designed process to receive client's inventory through a zero-dollar purchase order.
- Set up a contracted finished product as its own SKU and as an assembly with proper BOM and revision components. The latter could be set up later/ after the deal is closed via Quote or Sales order.
- Articulated the same assembly product code in the order that would be used to both quote and/or confirm the order to the client.
- Issued to the Product through Work Order and build as per usual manufacturing worksteps in NetSuite. Similarly, standard process for item fulfillment applies.
- Invoiced from the Sales Order with a sale price set to zero for the finished assembly. Add a separate line for the service cost per unit. The pdf is modified to not show extended prices for the products but break them down by quantity in the print out corresponding to the outsourcing fee charged.

BENEFITS ACHIEVED

The solution allowed the client to be able do the following:

- ✔ Track client inventory without affecting own numbers
- ✔ Operationalize monitoring of inventory movement through production and fulfillment
- ✔ Simplify production with standardized BOM and work orders
- ✔ Easily adapt SKUs after deal confirmation
- ✔ Clearly separate labor fees from product costs for billing
- ✔ Create client invoices with detailed breakdowns
- ✔ Use familiar workflows, reducing errors and training needs
- ✔ Scale easily for new clients and changing requirements since the solution design fits well with the native functionalities

KW Global Solutions

ISSUE | CLIENT REQUIREMENTS

The client would like to track R&D items but does not want it to count against Cost of Goods Sold and Inventory. Currently, this is a limitation for NetSuite non-inventory items as there is no quantity associated for this specific item type and hence, could not be tracked.

SOLUTION DESIGN | IMPLEMENTATION

Core of proposed solution: Have an R&D Location set up for those particular items and have them stocked and always be received at zero cost.

- Create a new, separate R&D Location. This will be used to track the quantity received for R&D Items.
- Retain the PO process and create PO's with the Rate and Amount having no changes since there is an Approval Process on Purchase Orders which is based on threshold amounts.
- Create a customization on the Item Record (a checkbox) to use to identify which items are for R&D.
- Develop a script to set the rate and amount on the Item Receipt stage to 0.00. It will be triggered if the following conditions are met:
  - The checkbox in (3) is marked on the item record and
  - The same item is entered on the Item Receipt
  - This will be on a line-level basis.
  - There will be no GL Impact , but there will be an increase in inventory as required.
- During the Bill stage, the rate and amount of from the PO will be carried over under the Items tab to account for the procurement.

BENEFITS ACHIEVED

✓ The solution allowed the client to to track R&D items but not have it count against Cost of Goods Sold and Inventory.

KW Global Solutions

ISSUE | CLIENT REQUIREMENTS

The client's operations involve stocking a core product that is repackaged into various SKUs tailored for specific markets, with label changes as the sole modification, and these labels are treated as part of the inventory.

The client has a requirement to include maintaining continuous awareness of the main product's stock level, holding repackaged SKUs at minimal or zero stock levels, and directing all production and procurement efforts towards the primary product, covering both components and labels.

SOLUTION DESIGN | IMPLEMENTATION

Create a Bill of Materials (BOM) for each alternate SKU:

- Each alternate SKU uses the main SKU as the base.
- Add the specific label for that SKU.

Assemble Alternate SKUs:

- Combine the main SKU and its label to create the alternate SKU when needed.

BENEFITS ACHIEVED

With the solution in place, the client was able to have the following:

- ✓ Accurate Stock Tracking
- ✓ Efficient Inventory Utilization
- ✓ Simplified Replenishment
- ✓ Streamlined Production/ Purchasing
- ✓ Reduced Waste
- ✓ Lower Carrying costs
- ✓ Traceability to the true/ direct main product without losing traceability or demand to the actual market SKU

KW Global Solutions