



10 best-practice reports for inventory companies using NetSuite to improve their supply chain operational performance and value.

The Ultimate Automated Supply Chain Reporting Package for NetSuite

Introduction: What Does the Ideal Reporting Process Look Like?

Supply chain concerns have driven major news cycles over the past few years. All of the pressures that emerged since early 2020 have made it clear that **managing an effective supply chain can make or break an organization**.

Some economists are predicting lean times ahead. In the event of a recession or economic downturn, companies with clear reporting and actionable insights into their supply chains will have an advantage. Satori Reporting created this package of 10 automated supply chain reports with those companies in mind.

Executive teams need reports that are **granular, actionable, regularly updated**, and can cut across variables including business units, products, and vendors.

Our 10 pre-built reports were created by supply chain experts and allow analysis of these core areas:

- ✔ **Vendor Performance**
- ✔ **Sales / Purchase Order Accuracy and Timeliness**
- ✔ **Supply Chain Cycle Times**
- ✔ **Inventory Forecasts**

There are many other insights provided in the reports, which can be integrated with hundreds of other data sources — including Shopify and Amazon — to create an enterprise-wide reporting platform.

This white paper is intended to provide executives who use NetSuite the information they need to analyze and optimize supply chains from high-level trends to the most granular detail imaginable.

For each of the reports below, we will identify the key objective, discuss the report's value, and show a visual example. This white paper covers 10 key supply chain reports:

- ✔ **Inventory Quantity and Value Trends**
- ✔ **Supply Chain Cycle Time**
- ✔ **Purchase/Sales Order Cycle Times**
- ✔ **Key Ratios**
- ✔ **Supply Chain Management Cost**
- ✔ **Purchase Order & Sales Order % On Time & In Full**
- ✔ **Cost/Unit Purchased**
- ✔ **Units by Location**
- ✔ **Vendor Analysis**
- ✔ **Projected Future Inventory**

About the Authors

Josh LaSov, Founder and CEO at Satori Reporting, is a founder of three SaaS companies and serial strategic advisor to numerous businesses from inception through sale. Josh is a Certified NetSuite ERP Consultant with experience implementing NetSuite for over 100 companies. Josh couples his NetSuite experience with his extensive BI experience where he's worked with 200+ NetSuite companies using Power BI. Josh strives to bring NetSuite companies actionable insight into their business through reporting and analytics.

Scott Pickering CPA, Engagement Manager at Satori Reporting, is a former multi-company C-Suite, including taking one company public. Scott has 20+ years' experience reporting/ business intelligence and visualizations with a dual background in accounting and computer information systems.

Report 1: Inventory Value & Quantity



Objective:

The Inventory Value and Inventory Quantity reports show similar insights across a given time period. Executives use these views to slice and dice by product class, item type, item group, or location. They display the valuation of acquisition costs of inventory items, or the quantity, across each axis.

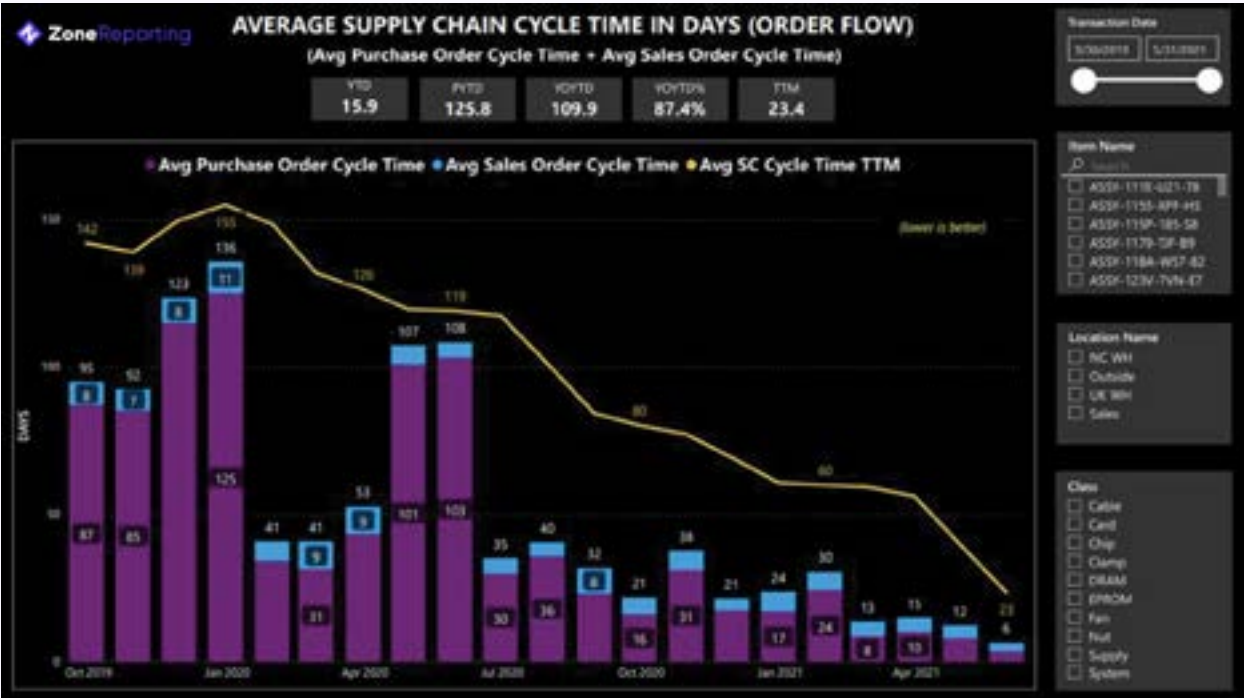
Other versions of this chart in the reporting package allow even deeper trending and comparative analysis

Report Value:

Trendlines – Delivers insights into how items or classes of item are moving in and out. This improves and optimizes purchasing decisions.

Proactive Management – Keeping an eye on trended visuals, as displayed in this report, gives leadership key indicators of inventory issues in real time.

Report 2: Average Supply Chain Cycle Time in Days



Objective:

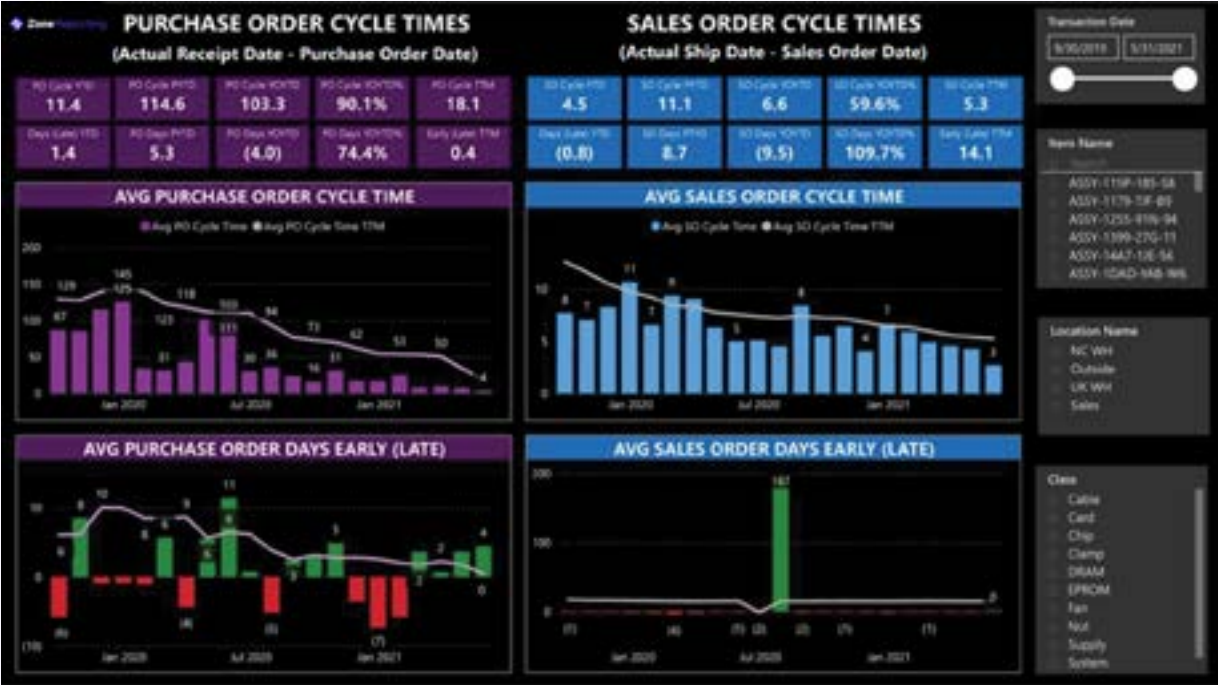
This is a critical chart for executives to use when evaluating supply chains. It is a key indicator of efficiency across the entire supply chain cycle.

Report Value:

Forecasting Insights – Looking at the full supply chain cycle, from purchase through shipping, gives executive teams greater ability to proactively spot trends in their cycle that can cause negative results.

Cycle Speed Analysis – Review the entire supply chain cycle and identify where slowdowns are occurring or could occur.

Report 3: Purchase/Sales Order Cycle Times



Objective:

In this view, executives can compare purchase order and sales order cycle times side by side. It highlights trendlines that reveal external and internal efficiencies to address.

Report Value:

Optimization – Identify areas for improvement, both on the supply side and the fulfillment side.

Supply Chain Efficacy – Determine how each location, business unit or product group is performing.

Report 4: Projected Future Ending Inventory by Week



Objective:

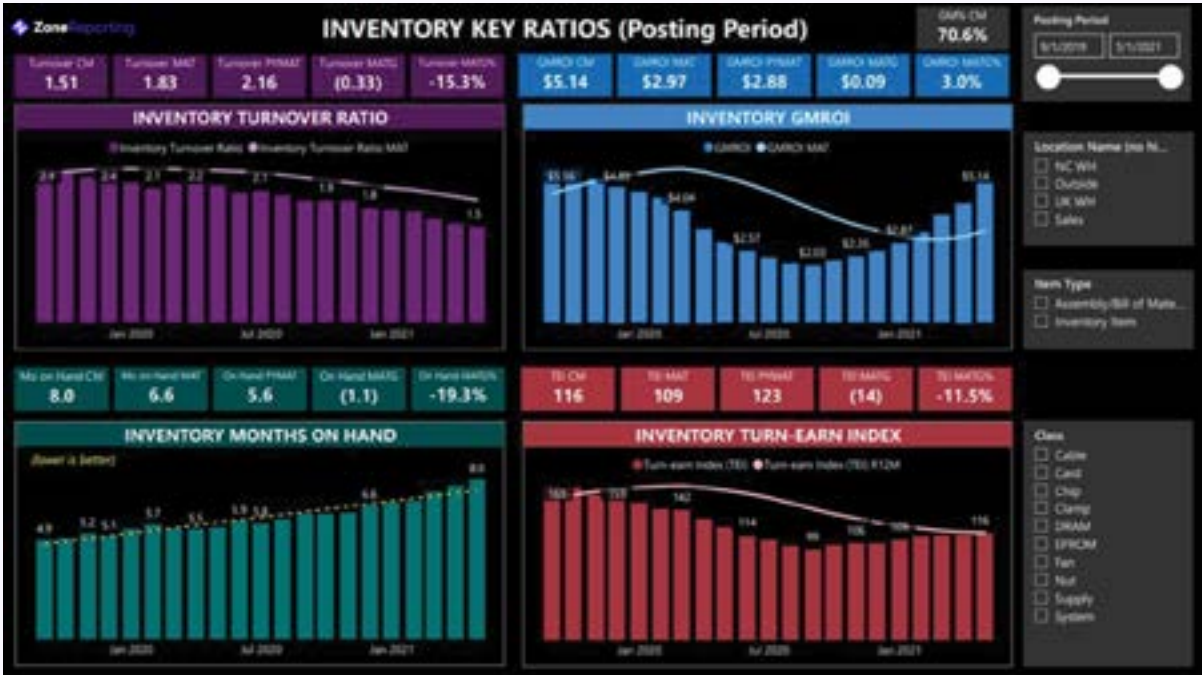
One of the most useful reports is Projected Future Ending Inventory by Week (rolling forecast). Based on supply (i.e. PO) and demand (i.e. SO's, sales forecasts) that can be captured from NetSuite and/or external data sources, it enables better forecasting of units on hand on a weekly basis. This report is commonly used by sales and operations for joint planning purposes.

Report Value:

Supply Chain Forecasting – Effectively managing a supply chain requires some ability to see the future. This report does that for inventory levels.

Decision Making – Planning ahead is key to optimizing the customer experience and costs. Using an inventory rolling forecast allows companies to look ahead to ensure they are planning properly. The old adage is more true in today's environment than ever: fail to plan, plan to fail.

Report 5: Inventory Key Ratios



Objective:

Your Inventory Key Ratios report is the most important command and control center for your supply chain statistics. It gives a clear visual overview of important ratios between inventory, turnover, GMROI and more.

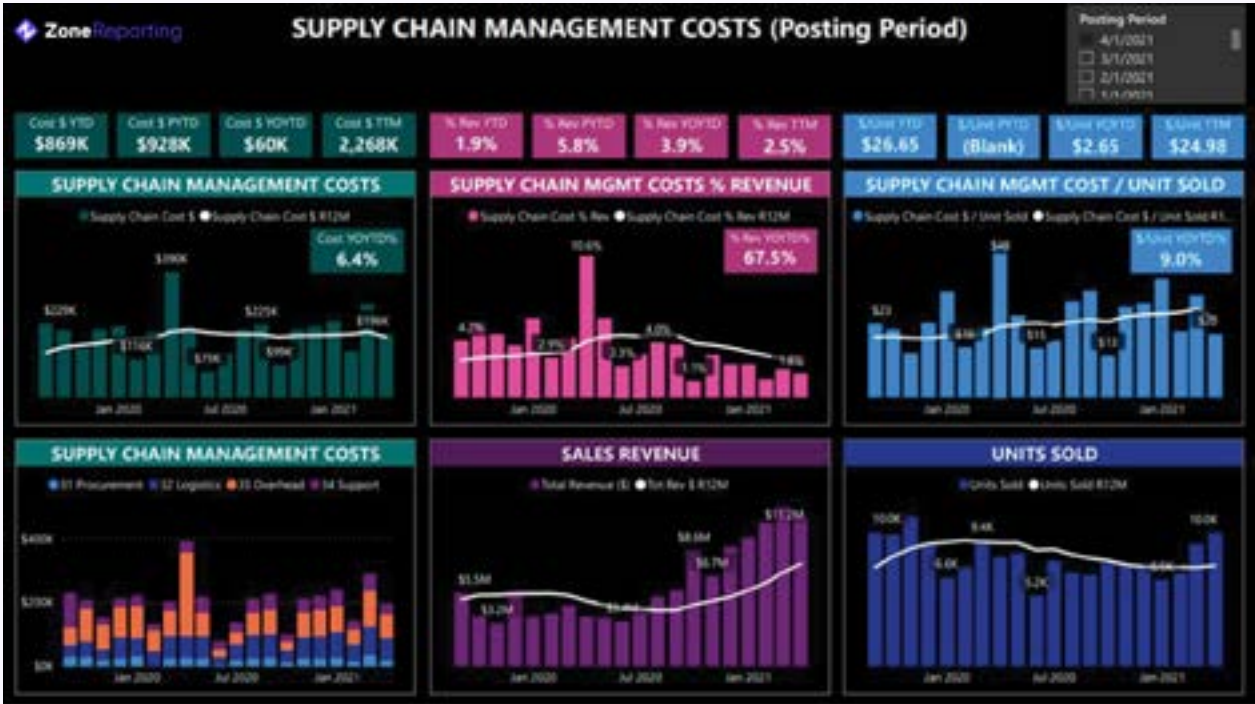
This combined view shows turnover, profitability, and return on inventory at a glance.

Report Value:

Inventory Compass – Understand which direction to steer your business using this dashboard.

Proactive Stance – The Inventory Key Ratios dashboard is an excellent chart for evaluating efficiencies in managing inventory .

Report 6: Supply Chain Management Costs



Objective:

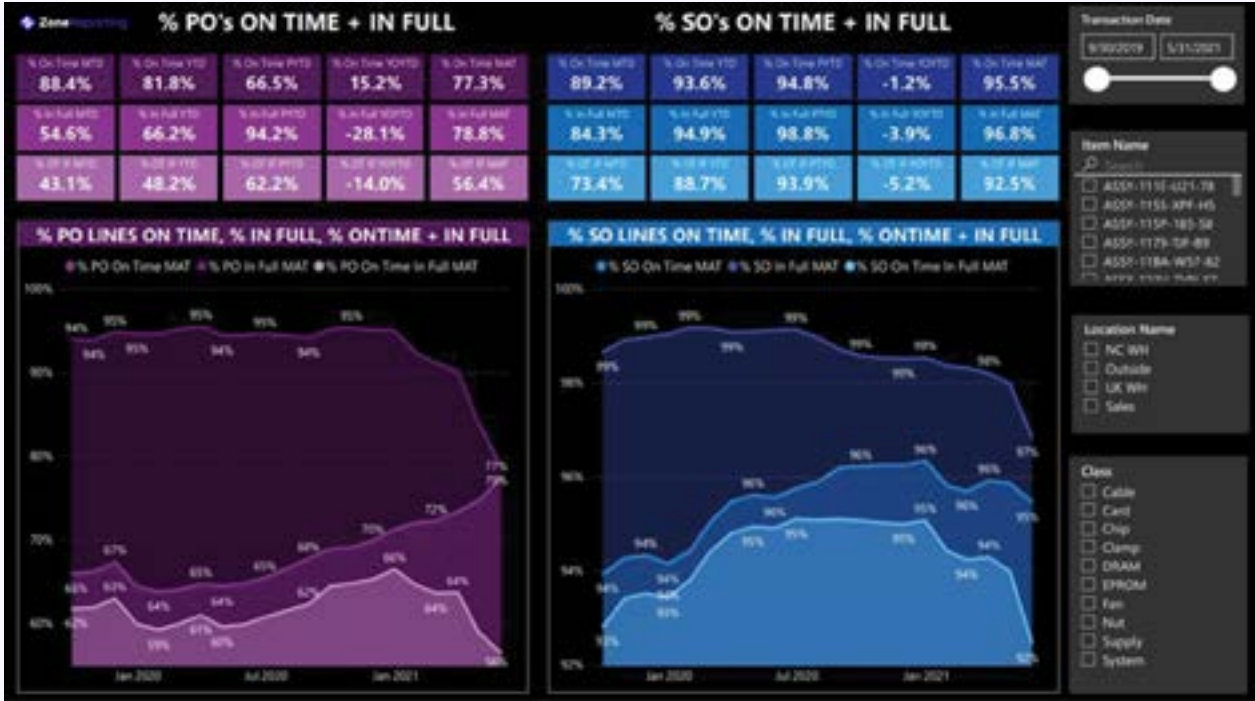
With costs on the rise across many parts of the supply chain, this report is especially important. Using this view, executives can more easily analyze costs and make improvements. It provides insights into costs against units sold, sales revenue, and as a percentage of total revenue.

Report Value:

Financial Visibility – Understand costs along multiple dimensions using this view. As your business grows and contracts during these turbulent times, it’s more important than ever to ensure your costs on a unit and/or % basis are right sized.

Supply Chain Optimization – Ratios and unit economics are often more insightful than raw numbers when comparing costs along each dimension. This report allows a deeper level of analysis than many executives see.

Report 7: Percent of Purchase Orders & Sales Orders on Time & in Full



Objective:

In this view, executives can compare purchase orders and sales orders. It allows a close analysis of how timely and complete POs are while also checking SOs for the same performance metrics.

Use this report to evaluate the timeliness of both POs and SOs by time period or cycle time.

Report Value:

Warehousing Performance – Dive into different warehouses and easily compare them by location or business unit to ensure fulfillment to your customers is operating at your expectations and in turn your customers have a good experience.

Vendor Comparison – Which vendors are completing orders and delivering them on time? This dashboard allows detailed comparisons at a glance.

Report 8: Cost Per Unit Purchased



Objective:

This report allows execs to drill down into total costs by unit purchased. It allows a granular look into breakdowns by item, class, location, vendor, and other variables.

Other related reports in the supply chain reporting package allow deeper analysis along amounts purchased, units purchased, and costs per unit.

Report Value:

Comparative & Trended Costs Per Unit – At the unit economic level, this report shows costs along a trended or average unit basis which is a key view in inflationary times to ensure your business is appropriately tracking and managing cost increases.

Deep Cost Analysis – Track variations in costs by the most important variables to identify areas of optimization and concern.

Report 9: Units by Location

ZoneReporting

UNITS BY LOCATION (Point in Time)

On Hand	Committed	Available	Backordered	In Transit	On Order	Fulfilled/Week	Weeks of Stock
5,959,573	124,612	5,029,887	211,649	89	9,211,623	1,044	5,706

UNITS BY STATUS & LOCATION

Location Description Item Name	Location On Hand	Location Committed	Location Available	Location Back Ordered	Location In Transit	Location On Order	Average Fulfilled per Week	Weeks of Stock
NC WH	5,644,360	37,076	4,818,697	43,332	0	8,885,394	1,063.85	5,306
Outside	264,890	87,454	177,031	162,249	2	324,103	194.12	1,365
Sales	23,512	21	23,491	6,021	12	1,367	1,129.67	21
NC WH : NC WH Discount	15,474	0	0	0	0		77.81	199
NC WH : NC WH Priority	5,309	0	5,509	0	0		0.00	0
UK WH	3,123	10	3,114	37	0	190	363.60	9
Satellite WH UK	1,515	0	1,515	1	0	494	490.10	3
Outside : Outside Discount	476	0	0	0	0		0.00	0
Outlet	221	0	221	9	0		2.10	105
Logistics : Logistics Priority	158	0	158	0	0		3.04	52
UK WH : UK WH Discount	134	0	22	0	0		0.00	0
UK WH : UK WH Priority	96	51	45	0	0		1.92	50
Logistics : Logistics On Hold	81	0	79	0	0		0.00	0
Distribution : On Hold	8	0	8	0	0		0.00	0
Logistics : Logistics Discount	2	0	2	0	1	1	0.06	35
Satellite WH CA	0	0	0	0	74	74	1.42	0
Total	5,959,558	124,612	5,029,872	211,649	89	9,211,623	1,044.37	5,706

Objective:

In this report you can view inventory availability across locations. Most importantly, the report's flexible formatting allows different views for different executives.

Report Value:

Flexible Dashboard Views – This is one of the top reports for customizing views for C-level executives who need unique views into the same data.

Actionable Logistics – View the latest status and availability by location, product group or other metric to inform high-level logistical decisions.

Report 10: Vendor Analysis by Transaction Date



Objective:

This is a valuable snapshot for executives to use when evaluating vendors. It zeroes in on activities and pinpoints which vendors are over-performing and which are lagging by a variety of metrics.

Cost variance shows how costs vary over time. This can happen a lot with raw materials that can fluctuate in price.

Report Value:

Side by Side Vendor Evaluation – Using this report, you can understand vendor performance on different levels of analysis and set benchmarks for new providers when needed.

Negotiation – Understanding the finer details of vendor performance helps with decision making and negotiation.

Conclusion

This 10-part reporting package is just the beginning of Satori Reporting's supply-chain management insights. It allows executives in various roles to truly **understand the supply chain cycle at a high level**. At the same time, it allows intricate **slicing along many dimensions**.

Satori Reporting is proud to offer the ultimate **pre-built reporting solution for companies using NetSuite** – all built inside of the #1 ranked BI tool: Microsoft Power BI. The value points of our pre-built reporting package include:

- ✓ **20+ Pre-built reports** designed by supply chain analysis experts
- ✓ Pre-built integrations with **Salesforce, Google Analytics, Google AdWords** and many more popular applications
- ✓ **Unlimited joins across NetSuite** - for example the sales order profitability (joining sales order, item fulfillments, invoices and credits)
- ✓ Fast implementation in **under two weeks**
- ✓ Reconciles with NetSuite – this package was built by NetSuite experts, and the reports **reconcile back to your NetSuite data from day one**
- ✓ **Pre-built Power BI reporting platform** - for NetSuite that you can use to build your key reports and analyses.

About Satori Reporting

SATORI

Satori Reporting is the first and only pre-built Power BI solution for NetSuite, Intacct and Salesforce.

Satori Reporting has 100+ live customers using their pre-built Power BI solution.

With a less than 2-week implementation, Satori Reporting provides a completely replicated instance of NetSuite to their customers with 50+ pre-built reports designed by former C-Level executives.

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