



For Microsoft Office

## NetSuite Planning and Budgeting Smart View



### Analyze, Update and Report

NetSuite Smart View provides a common Microsoft Office interface with which you can view, import, manipulate, distribute and share data in Excel, Word, PowerPoint and Outlook. It is a comprehensive tool for accessing and integrating content to and from NetSuite across Microsoft Office products.

- Ad hoc or free-form analysis for NetSuite data in Office.
- Predefined forms for user interaction.
- Flexible report design with dynamic data update.
- Common data model for enhanced security.

### Smart View Key Capabilities

- Ability to integrate NetSuite data directly into Excel, Word, PowerPoint and Outlook.
- Full ad hoc and free-form analysis capabilities.
- Ability to create data perspectives for end users called Smart View Worksheets.
- Ability to dynamically refresh NetSuite Planning and Budgeting data across Office documents with a single click.
- Ability to perform selective, multi-page import of NetSuite Planning and Budgeting documents.
- Highly formatted grids and charts in Excel and PowerPoint linked directly to NetSuite Planning and Budgeting data.
- Report creation in Excel, Word and PowerPoint using NetSuite Planning and Budgeting data.
- Enhanced Smart View reporting flexibility and automation in Excel using VBA macros.

## Ad hoc or Free-form Analysis for NetSuite Data in Office

Flexible access to an organization's data in a secure, permission-based environment allows users to quickly access or calculate important business metrics. With NetSuite Smart View, consumers of information across an organization can use Excel to interactively and dynamically investigate data extracted from NetSuite or other sources. Analysis may start with templates designed to jumpstart the investigatory process (such as Region: West > Line-of-Business: Perishables > Items: Vegetables) or a blank Excel sheet where they begin browsing, filtering, shaping and altering data forms to meet their needs. Customized data forms can be saved as needed for future use or distribution.

## Predefined Form Interaction

Users who prefer to leverage predefined input/reporting forms find Smart View a convenient way of interacting with and consuming data using Office applications. These users are often in operational or business roles across the company and have the desire to work in Excel, Word or

PowerPoint for their analysis and reporting needs. Data can be seeded in predefined forms leveraging user specific permissions and dynamic data refreshes directly from NetSuite.

## Report Design

Create pixel perfect reports with Smart View. Smart View's financial and management reporting allows an organization's NetSuite data to be displayed in highly formatted Excel, Word or PowerPoint views. With the data accessible in Office applications, users can create reports as needed combining different data types from NetSuite. With the power of Office, users can create comprehensive reporting packages which can be refreshed as needed.

## Pre-Created Content Access

Data forms or visualizations can be designed and organized in a way which allows intuitive navigation and consumption of content. Users may access pre-created content—for example, double-clicking in Excel, Word or PowerPoint to import pre-created and dynamically linked tables, charts or grids—for use in their own calculations, documents or presentations.

