

Case Study

One NetSuite Health Check. Better Margin Visibility. **A Year of Compounding Wins.**

How FieldTech Solutions uncovered immediate improvements that led to a long-term NetSuite optimisation partnership.

**Industry:**

Manufacturing and Distribution, Environmental and Field Products

**Location:**

Brooklyn, Victoria, Australia

**Services:**

On-site solution review, customisation, software licensing, and ongoing pre-paid NetSuite support

**Technology:**

Custom margin and markup reporting on Item records and OneKloudX Kanban Boards for Oracle NetSuite CRM

THE ORGANISATION

A manufacturer and distributor of innovative environmental products

FieldTech Solutions designs and supplies innovative products for environmental professionals, including its BioGone range, sold both through a dedicated e-commerce site and via a network of field consultants selling directly to customers.

With manufacturing, warehousing, e-commerce, and a distributed sales team all running through NetSuite, FieldTech's operations span a wide cross-section of the platform.



THE CHALLENGE

A platform with untapped depth, surfaced through a hands-on site visit

Rather than working from a ticket queue, OneKloudX's Account Manager spent a day on-site at FieldTech, walking the warehouse floor and sitting with the Item Management, Finance, Purchasing, and CRM teams individually. What emerged was a picture of a NetSuite environment that had grown organically, where teams had built effective workarounds for gaps the platform could otherwise close natively.

On the commercial side, FieldTech's biggest blind spot was pricing visibility. The team could see the standard NetSuite Item pricing sublist, but had no way to see, at a glance, whether a given price level was actually hitting their target margin. Desired markup existed only as an internal benchmark; actual markup had to be worked out manually against the latest landed cost, item by item, price level by price level.



On the commercial team side, the sales function was leaning on NetSuite CRM for quotes, but had not yet adopted the lead-to-opportunity pipeline functionality the platform offered, leaving the sales team without a clear, visual way to track deals moving through the pipeline.

Beyond these two priority areas, the site visit surfaced a long list of further opportunities across inventory, finance, and purchasing, from manual bank reconciliation and supplier invoice entry, to a paper-based warehouse process reliant on packing slips and spreadsheets, to purchasing being managed entirely outside NetSuite via manual spreadsheet exports and imports.

THE SOLUTION

Two fast, high-impact fixes, with a longer-term roadmap

OneKloudX prioritised the two issues with the most immediate commercial impact, margin visibility and pipeline visibility, delivering both as scoped, fast-turnaround engagements, while documenting the broader set of opportunities surfaced during the site visit for FieldTech to action over time.

Margin Visibility, Built Directly Into the Item Record

OneKloudX built a custom pricing view on the Item record showing both Desired Markup % (manually set by FieldTech) and Actual Markup % (calculated automatically from base price and latest landed cost), alongside a Margin \$ column for every price level at quantity zero. Because NetSuite's native pricing sublist cannot be directly altered, OneKloudX built a dedicated, view-only custom sublist purely for reporting, leaving NetSuite's pricing engine itself untouched and fully intact.

For the first time, FieldTech's team can see, on the Item record itself, whether Base Price, Wholesale Price, Reseller Price, or any other price level is actually delivering the margin it was meant to, without exporting anything to a spreadsheet.

Kanban Boards for a Visual Sales Pipeline

OneKloudX implemented Kanban Boards for NetSuite across Opportunities, Quotes, Prospects and Leads, and CRM Activities, giving FieldTech's sales team a visual, drag-and-drop way to manage pipeline that NetSuite's standard list views did not offer. The solution was licensed for up to 10 boards with unlimited users, giving the wider commercial team room to extend the same visual workflow to other parts of the business over time.

A Documented Roadmap for What Comes Next

The site visit findings were captured as a structured set of recommendations across Item Management, Finance, Purchasing, and CRM, covering opportunities such as activating landed costs natively in NetSuite, automating EFT/ABA supplier payments, enabling 3-way PO matching, introducing reorder points and MRP for purchasing, and an intermediary warehouse digitisation step ahead of a full WMS. This gives FieldTech a clear, prioritised view of where their next investment in the platform will have the most impact.

THE RESULTS

Fast wins that built into a continuous, year-long partnership

What started as a single on-site review has grown into an ongoing relationship, with FieldTech consistently topping up pre-paid NetSuite support hours every few months since late 2024, a clear sign of sustained trust and continuous value being delivered.



Margin visibility, without leaving the Item record

FieldTech can now see Desired Markup %, Actual Markup %, and Margin \$ for every price level directly on the Item record, removing the need to reconstruct margin calculations manually.



A visual pipeline for the sales team

Kanban Boards gave FieldTech's commercial team a drag-and-drop way to manage Opportunities, Quotes, and Leads, licensed for up to 10 boards with unlimited users to grow into.



A relationship that has compounded

Since the first 20-hour pre-paid support engagement in August 2024, FieldTech has consistently renewed at 35 hours roughly every quarter, a sustained pattern of trust that continues through to mid-2026.



A clear, prioritised roadmap

Beyond the two delivered fixes, FieldTech now holds a documented set of recommendations across Finance, Purchasing, and Item Management, ready to be scoped and actioned as priorities allow.

A relationship built on showing up, not just ticketing

What set this engagement apart was the approach: rather than waiting for FieldTech to log support tickets, OneCloudX's Account Manager went on-site and sat with each team individually, Item Management, Finance, Purchasing, and CRM, to genuinely understand how the business worked day to day. That hands-on discovery surfaced issues FieldTech had been quietly working around for some time, and gave OneCloudX the context to prioritise the two fixes that would deliver the most immediate value.



That same approach has carried through into the ongoing relationship. FieldTech's consistent pre-paid support renewals, sustained for well over a year, reflect a partner that responds quickly, resolves issues properly the first time, and continues to surface opportunities for FieldTech to get more value from the platform they have already invested in.



OneCloudX is an award-winning ANZ NetSuite Solutions Partner with a people-first approach at our core. We believe technology should empower people, not overwhelm them, which is why we provide strategic advisory and implementation expertise across NetSuite, MYOB, and Epicor, ensuring businesses choose and deploy the right technology for their needs.



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