

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:**

Kanban Boards for Oracle NetSuite CRM by OneKloudX

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, the clearest gap was in the sales function. The team 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.

THE SOLUTION

One fast, high-impact fixes, backed by ongoing ad-hoc support

OneKloudX prioritised the issue with the most immediate commercial impact, pipeline visibility, and delivered it as a scoped, focused engagement.

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.

“ Someone actually sitting with each team and watching how we work made all the difference. Seeing everything in one place instead of digging through separate lists has made the day-to-day admin so much lighter for our sales team, and having ad-hoc support on hand means we can keep tackling the rest of the list as it comes up.”

- John Mancarella, Managing Director, FieldTech Solutions

THE RESULTS

Real, everyday wins from one focused fix

The Kanban Boards engagement didn't just tick a box, it changed how FieldTech's sales team works day to day. For a team that had grown used to piecing pipeline status together across separate lists, the shift was felt almost immediately. Four tangible changes stand out:



Deals updated with a drag, not a re-entry

Sales reps move a deal from one stage to the next by dragging it across the board, instead of opening the record and updating a field by hand.



One board for the whole sales motion

Leads, Prospects, Quotes, and Opportunities now sit on the same visual board, so the sales team can see exactly where every deal stands without piecing it together across separate lists.



Built inside NetSuite, not bolted on

Kanban Boards run natively inside NetSuite CRM, so the sales team gets a visual pipeline without learning a separate app or maintaining another system alongside it.



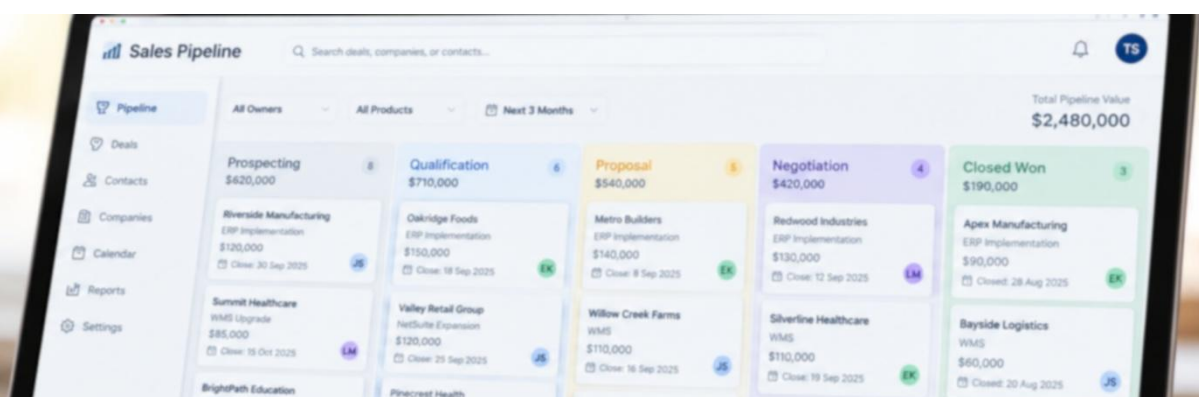
Room to grow, without buying more

The solution was licensed with room to grow, giving FieldTech space to roll the same visual workflow out to other teams without a new purchase.

“

We keep coming back to OneCloudX because every time we raise something, it gets sorted properly the first time. That reliability is worth a lot when NetSuite touches almost everything we do.”

- John Mancarella, Managing Director, FieldTech Solutions



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 fix that would deliver the most immediate value, and flag the rest as opportunities FieldTech could pick up through ongoing, ad-hoc support.



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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