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# How to Track Key Metrics With NetSuite KPI Scorecards

**ORACLE**  
**NETSUITE**



## How to Track Key Metrics With NetSuite KPI Scorecards

Dashboards and key performance metrics (KPIs) provide a real-time view of your business and are critical components of the NetSuite user experience. NetSuite KPI Scorecards provide even more opportunity for comparisons and calculations than standard KPIs and portlets.

Use these tips to set up and use KPI Scorecards to deliver more complex and in-depth trend analyses.



## 1. KPI Scorecards Overview

KPI Scorecards allow for more complex comparisons over various date ranges or accounting periods, rather than one comparison range. For example, you can compare across multiple periods, such as this quarter, last quarter, and last fiscal year. You can include formulas and functions in scorecards and add custom KPIs, and the way you display KPI data in your scorecards is configurable. You can highlight specific rows, add headlines, and easily access trend graphs directly from the scorecard.

NetSuite provides out-of-the-box scorecards, including metrics, expenses, financial ratios, vendor performance, and more.

The KPI Scorecards feature must be enabled by the administrator. To enable the KPI Scorecards feature:

- Go to Setup > Company > Enable Features.
- On the *Analytics* subtab, check the *KPI Scorecards* box, and click *Save*.

Once enabled, you can create your own KPI scorecards and add a KPI scorecard portlet to display an existing KPI scorecard.

## 2. Creating KPI Scorecards and Portlets

To create a new KPI scorecard:

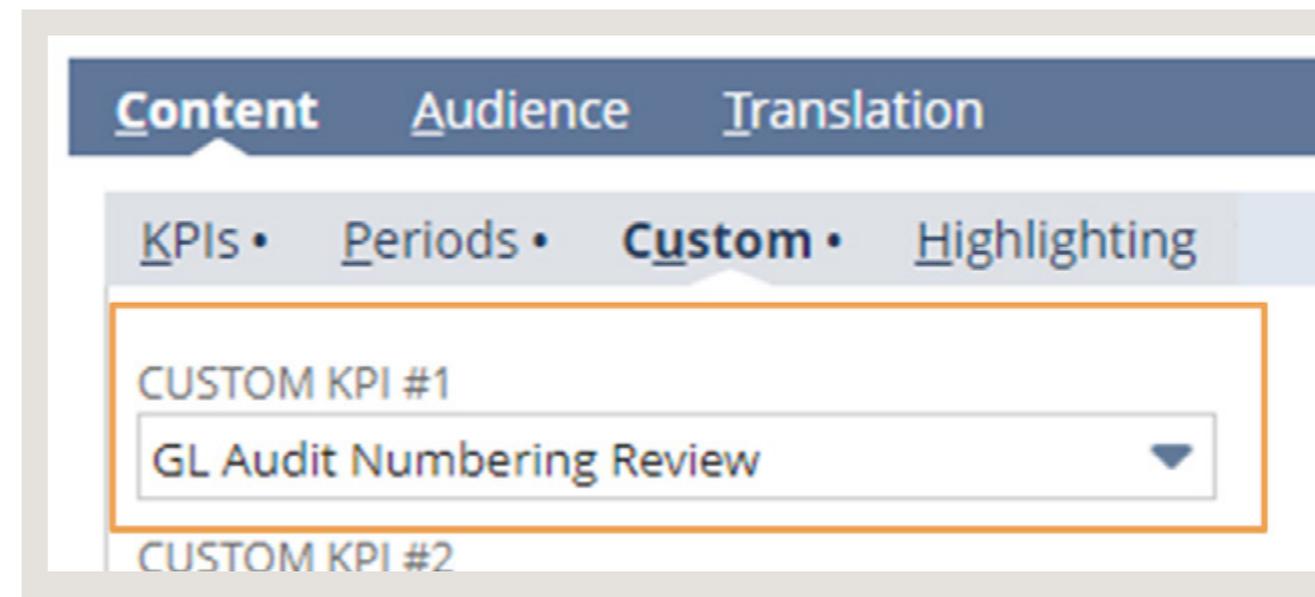
- Search for *Page: New KPI Scorecard* or navigate to *Customization > Centers and Tabs > KPI Scorecard*.
- *Name* your scorecard. Note that this name will display on your dashboard, so be thoughtful about your naming conventions for new scorecards.
- *Select* standard KPIs.
- *Add* custom KPIs you create. Then, define your custom KPIs.
- *Build* the scorecard using either Date Ranges or enable Use Periods.
- Once you've created a KPI scorecard, you can then add them to a portlet. Click *Personalize* in the upper right corner of your dashboard or use *Personalize Dashboard* in the *Settings* portlet.
- Click the *KPI Scorecard* icon or drag it onto the dashboard.
- Click *Set Up* in the portlet or the portlet menu to configure the portlet.
- Select the KPI scorecard to display and click *Save*. You can also set filtering and orientation options and choose to show or hide the date row or trend graph icon.

**Tip!** If you want KPI data to be calculated according to accounting periods rather than date ranges, check the Use Periods box. When Use Periods is selected, the name of the Date Ranges subtab changes to Periods. It will restrict all data entries to only accounting period ranges across all KPIs.

### 3. Creating Custom KPIs on Your Scorecard

You can use the Saved Searches feature in NetSuite to build custom KPIs and custom metrics. Custom KPIs allow you to spot trends specific to your business, for example, tracking average expenses across separate locations. You can add custom KPIs to your scorecards. Click the Custom tab to select the KPIs you want to use, then select the values you want to compare and comparison types.

**Tip!** You can add as many as 10 custom KPIs to your scorecard. You can also place the letters “KPI” in the name to limit your picklist to searches that are only KPIs.

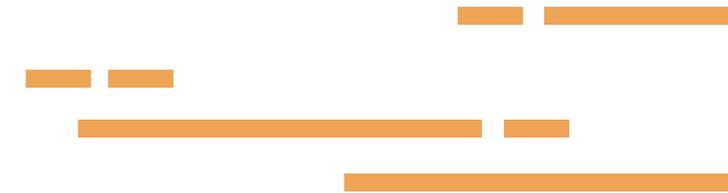


## 4. Comparing and Highlighting Data

You can display comparisons of KPI data across different time periods, with percentage changes calculated automatically.

You can also highlight displayed KPI data that exceeds or falls short of a threshold that you define.

- Use the *Image column* to select an image to be displayed with the highlighted result.
- Use the *Text Color column* to select a text color other than the default for the highlighted result.
- Use the *Background Color column* to select a background color other than the default for the highlighted result.
- Check the box in the *Bold column* to display the highlighted result in bold text.
- Check the box in the *Headline column* to display the highlighted result as a headline.



## Supporting You Along the Way

If you want to learn more about creating and customizing KPI Scorecards, visit the *How Do I Create KPIs?* Learning Path.

For more in-depth training on how to use formulas and functions within KPI Scorecards and Saved Searches, visit *SuiteAnalytics: Advanced Searches*. Both of these titles are in your [NetSuite Learning Cloud Support \(LCS\)](#) Pass.

[LCS](#) provides subscription-based training that allows all NetSuite users to engage in continuous education easily and cost-effectively. With on-demand learning, hands-on lab exercises, and multiple training options, LCS can help accelerate your entire organization's system knowledge and productivity.

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