



## NetSuite Customization Using SuiteFlex

*“It’s been a true pleasure working with Explore. The consultants that we have helping us with our projects really work together well as a team and that means a lot to us. When one person is not available, another is right there to pick up the task at hand. I personally enjoy their positive “can-do” attitudes and willingness to go the extra mile to complete the task. They are very conscientious and work very hard at getting the details right. During set-up they seem to ask all of the right questions and bring up issues we would not have thought of. We are very happy with the service we are receiving and look forward to a continued relationship.”*

- Christi Otway, Corporate Benefit Strategies, Inc.

**Background:** Corporate Benefits Strategies (CBS) is an employee benefits and human resource outsourcing firm using NetSuite as their ERP system. CBS specializes in cafeteria plans, flexible spending accounts, COBRA and HIPAA compliance, employee communications, ERISA welfare plan compliance, and employee benefit outsourcing services. In addition, CBS provides a full array of services including employee communications, legal compliance, efficient administration, and strategic employee benefit planning. CBS utilized Explore Consulting to implement NetSuite and customize it to meet some of their unique business needs.

**Issue:** The nature of Corporate Benefits Strategies’ business requires that they keep accurate and extensive data about each of their clients and benefit packages. This information must be organized and maintained in NetSuite. In addition, every year, their clients must go through a renewal process that involves a thorough review and update of each benefit plan. This requires an extensive effort to provide current plan information to each client while allowing them to modify and submit for the following year. The progress of each renewal requires tracking and monitoring to ensure that each renewing client’s information is returned, completed, and submitted on time.

**Solution:** NetSuite SuiteFlex extensibility using a combination of custom records, custom fields, and

| Renew                 | Cancel                 | Plan Name                       | Status                         |
|-----------------------|------------------------|---------------------------------|--------------------------------|
| <a href="#">Renew</a> | <a href="#">Cancel</a> | Explore Test Client - EAP -2011 | Pending Notification           |
| <a href="#">Renew</a> | <a href="#">Cancel</a> | Makoto COBRA Dental 2011        | 60 Day Notice prior to renewal |

SuiteFlow workflows allowed the Explore team to organize and store each CBS client’s benefit plan data inside NetSuite. Hundreds of data points were created using point-and-click setup without any coding. This was a significant reduction in effort over traditional application development. The SuiteFlex architecture also allowed us to make changes quickly and easily.

The renewal process was also automated. Each year as a client’s renewal date approaches, the system will copy the current year’s plan data into a new record for the following year. An email is then automatically sent to the primary contact at the

client who can then easily and quickly click on a link to view their benefit plans. The first image below shows a Suitelet page that lists each of the plans for a client. The clients can then review each plan, make modifications and submit to CBS for internal review.

**Results:** Explore Consulting was able to design and implement a SuiteFlex application that met the

needs of CBS by using NetSuite’s customization capabilities. By building on the NetSuite platform, the solution was completed much more quickly and for lower costs than other alternatives. CBS now has a system that allows customers to view, modify, and submit their yearly benefits data directly against their system with much less management required.

**Custom Suitelet displaying client plan information**

**Corporate Benefit Strategies, Inc.**

### COBRA Renewal

|                 |                     |
|-----------------|---------------------|
| Company Name:   | Explore Test Client |
| Contact Person: | Dave A Rowley       |
| Phone Number:   | (303) 798-7000      |
| Title:          | Client Contact      |
| Email Address:  | drowley.a@gmail.com |

**Annual Administrative Fee Adjustment**

Please provide the highest number of employees who are enrolled in a COBRA-eligible plan (i.e. medical, dental, vision plan), as of 60-days prior to your renewal date. CBS will use this number to adjust your monthly COBRA administrative fee on an annual basis

Number of Employees:

*(Required)*

\* If you wish to change your primary contact, please call Corporate Benefit Strategies

#### COBRA Plans

The following list of plans are renewing, please click on each plan and review the information, make updates as needed and submit to Corporate Benefit Strategies. To create a new plan, click on the "Create New Plan" button below.

|  |                                 |                                |
|--|---------------------------------|--------------------------------|
| <a href="#">Renew</a> <a href="#">Cancel</a> | Explore Test Client - EAP -2011 | Pending Notification           |
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**CREATE NEW PLAN**

**Custom Suitelet allowing client modification and submittal of plan**

**COBRA Rate Renewal Data Collection Sheet**

Please make changes or additions to the following information where necessary. Click on the question mark boxes for additional information regarding that field. To assure your changes have been made, be sure to check either "Save and Continue Later" or "Save & Submit to CBS Now".

**Service Plan**

TEST COBRA Service [Click here to go back to the Service Plan](#)

**COBRA Plan Info**

Plan Type:   Self Funded  Fully Insured

Next Renewal Date:  Policy Number:

Carrier/Administrator Name: BCBS For Existing Employees, Loss of Coverage:

Carrier Contact Name:  End of the COBRA Coverage Period:

Employer Divisions/Locations:  Plan Bundled With:

**Monthly Premium Rates: (Is the 2% COBRA fee  included or  excluded in the following rates?)**

| Coverage Level         | Rate      |
|------------------------|-----------|
| Single (1P)            | \$ 50.00  |
| Employee + Spouse (2P) | \$ 60.00  |
| Employee + Child (2P)  | \$ 70.00  |
| Family (3P+)           | \$ 200.00 |

**About Explore Consulting**

Based in Bellevue, Washington, Explore Consulting was founded in 2001 and is a professional services company dedicated to providing innovative and cost-effective solutions for their customers’ database and IT systems needs. Having specialized in SaaS solutions for more than 10 years, Explore Consulting is the largest and most experienced NetSuite reseller and solution provider in the Northwestern United States. Whether you are looking for assistance with your NetSuite purchase and implementation or needing to integrate your NetSuite account to an external data

source, Explore is your one stop NetSuite service provider. Explore Consulting is well-known as a leader in NetSuite customization, integration and extensibility, and was recently included on the Inc. 5000 list of fastest growing privately owned companies in the U.S. for the fourth year in a row as well as the Puget Sound Business Journal’s 100 Fastest Growing Private Companies. Explore has also been a 6-time NetSuite Star Performer and was recently named as 2011 NetSuite Partner of the Year, Americas. For more information, visit [www.exploreconsulting.com](http://www.exploreconsulting.com).