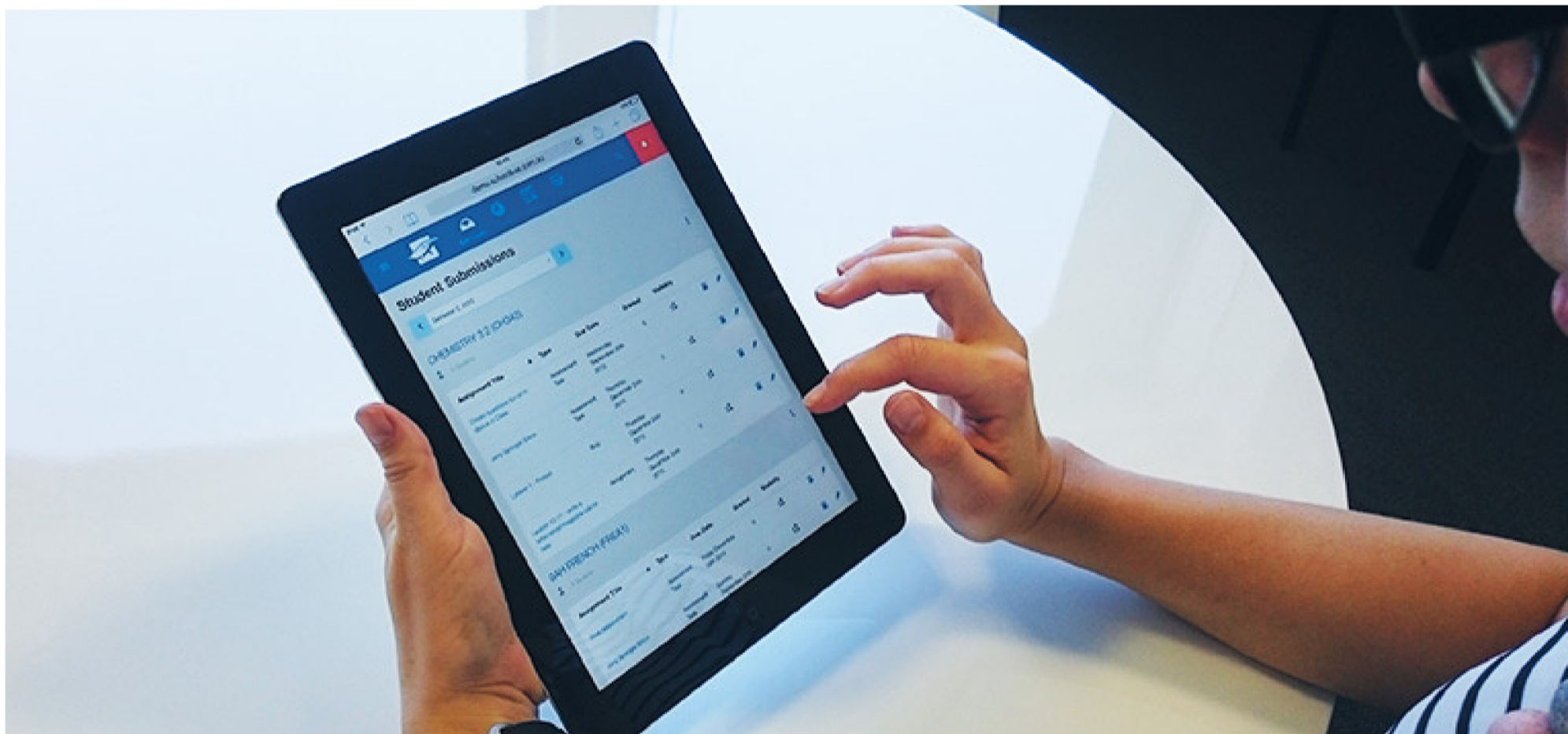


# Case Study



## Background

Focused on providing the best school learning and community portal, Schoolbox identified the need to improve how NetSuite data was brought to the surface, which allowed their team to make decisions on the actions needed in their role. Schoolbox was looking for a local NetSuite partner who could work with them to turn on the features they weren't using, while at the same time educate their team on the other powerful NetSuite ERP features that could benefit their business.



Founded in 2002, Australian based, Schoolbox is an all-in-one learning management system that transforms K-12 schools with technology that has a positive global impact.

Schoolbox connects the entire school community with a powerful portal for parents, staff, and students, and provides a holistic platform to support the development of the whole student; their academic growth, extracurricular involvement, and wellbeing.



**Industry:**  
Software and  
Professional Service  
Education



**Location:**  
Camberwell  
Victoria



**Solution:**  
NetSuite Services  
Edition with Contract  
Renewals

## The Challenge

Schoolbox is growing exponentially with more schools wanting to evolve their online learning systems to meet the increasing requirements for digital learning. With the growth in the number of users on their platform, Schoolbox needed a more effective way to manage contracts and service engagements that included the number of licenses and users for each school. Schoolbox had been relying on different reports downloaded into Excel spreadsheets resulting in a disjointed view of projects and financials.

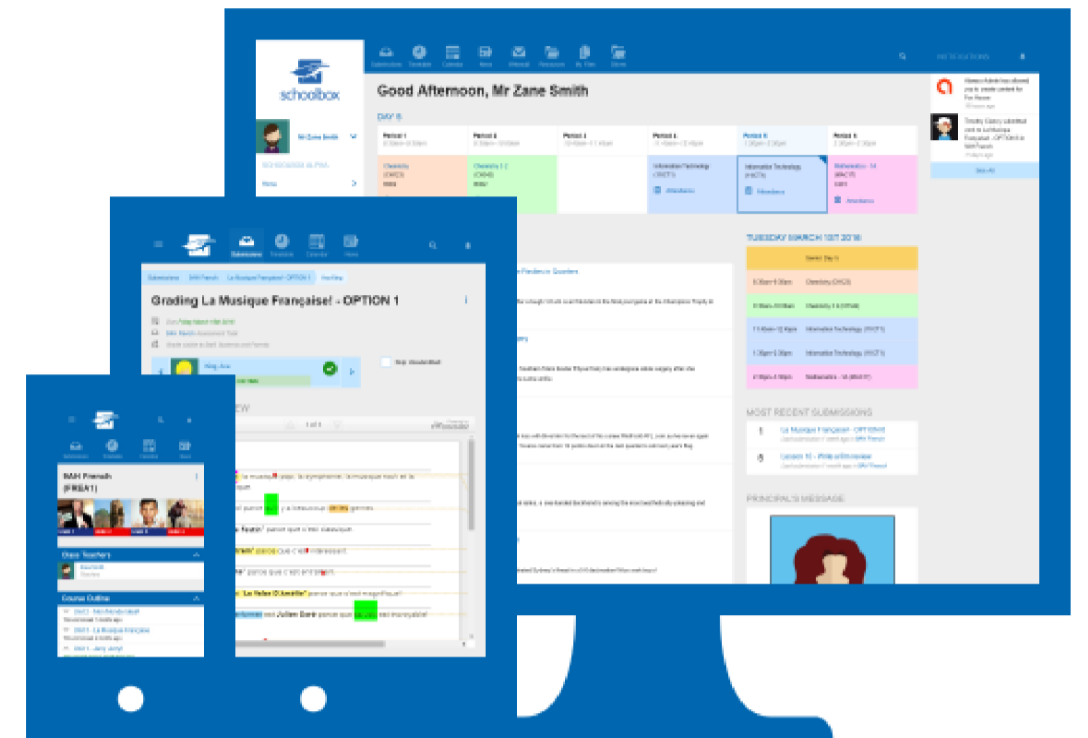
Schoolbox realised they needed a more accurate view of their contract renewals and any additional seats or licenses that may have been added in the previous twelve months. The Finance team found their software subscription and project billing process in NetSuite ERP challenging with inaccuracies, and in cases missed invoices. Additional seats and licenses that had been added throughout the year weren't being added to the contract renewal and with that drop off from the billing cycle. Schoolbox required their NetSuite ERP system to accurately manage customer subscription billing and ensure they were being paid for the correct number of users per the contracts.

As a software company, Schoolbox had no trouble with user adoption, however they knew they needed an in-depth understanding of the NetSuite ERP features specifically in the software area that would save them time and money.



## In Response

OneCloudX identified that some of the contract renewal and user dashboard capabilities were needed to enable the Schoolbox team to have more control over their customer subscription transactions and project delivery activities. With the dashboard, Schoolbox would be able to set up workflows enabling them to free up resources on projects and deploy them where they were needed. With a clear view of each project and customer, the Finance team could also perform an internal audit on customer licenses versus what they were being charged.



As part of the workflow, OneCloudX also included a failsafe mechanism to alert the Finance team to transactional errors. These workflows have enabled the Finance team with the ability to update the necessary workflows to ensure all transactions and activities have been captured. If a transaction does not meet the required criteria the failsafe mechanism within NetSuite alerts the Administrator to the missing information.

Schoolbox knew that NetSuite had the robust functionality that they needed to streamline their operations; they just needed the expert guidance in order to familiarise their team with all the features of their NetSuite ERP system.

## The Outcome

OneCloudX has helped Schoolbox to realise their NetSuite ERP return on investment within one month by identifying missed user subscription and expenses on their invoices that were not being charged back to the customer.

NetSuite's scalable, workflow-driven platform was implemented and increased overall business efficiency and profitability for Schoolbox. With the ability to easily track expenses and customer charges, they have been able to ensure customers are charged correctly for the services they are using.

With the dashboard OneCloudX created, Schoolbox are now able to make informed decisions based on accurate real-time data. The Schoolbox team are no longer reliant on project managers to produce reports, as the project information is now available for anyone to view from the dashboards. From the number of licenses, a customer has to their contract renewal date, Schoolbox has gained new visibility with customer data across Finance, Sales and Support to help them make better business decisions.

One of the biggest challenges the team at Schoolbox faced was not being exposed to all the features of their NetSuite ERP. With a structured training programme from OneCloudX, the Schoolbox team are now confidently capable in their ability to fully utilise the system, eliminating the need for manual bottlenecks and information silos. With customised reports the team can raise alerts, based on specific criteria, that trigger notifications to the appropriate users.

OneCloudX also implemented a 90-day renewal expiry alert on the NetSuite user dashboard, which streamlined the contract renewal process for the Contract Managers and the Finance team by alerting the team as necessary to approve customer invoices. The Contract Managers are now able to check the number of licenses each customer is using and ensure this is reflected in their contract before it rolls over. This contract renewal process has resulted in more accurate customer license information and increased profitability.

"The OneCloudX team have been open and willing to work with us onsite and collaborate in a modern, agile fashion. The flexibility and agility nature of engagement has been a large benefit to the scaling of our projects. The value-adds that the OneCloudX team delivered are now daily operational critical."

**Sean Richards, Director and Co-Founder**



OneCloudX is the only local NetSuite ERP and Financial Planning partner with offices in Melbourne and Sydney who brings our industry specific operating model in Wholesale Distribution, Manufacturing, Financial Services, Professional Services, Software and Non-For-Profit built over a decade to our on-site implementations, optimisations and support.

Melbourne Office - 20/644 Chapel Street, South Yarra Vic 3141

Sydney Office - 902/138 Walker Street, North Sydney NSW 2060

W. [www.onecloudx.com.au](http://www.onecloudx.com.au) T. 1800 155 683 E. [info@onecloudx.com.au](mailto:info@onecloudx.com.au)

