

Case study

Redesigned NetSuite approval process built to help Wellframe scale



Wellframe

Wellframe is a Boston-based organization that specializes in Digital Care Management solutions. They combine tech and healthcare to create a digital space for next-level clinical care delivery. In less than 10 years, the company has grown to almost 100 employees and has helped healthcare organizations go beyond industry standards for patient support.

As a quickly growing organization with an approval process that needed improved controls and visibility for management, Wellframe, Inc. looked for a better way to enable their employees' purchasing requests and gain visibility and control over their approval process. They searched for a solution that went beyond NetSuite's standard and advanced approval capabilities and could extend the purchasing visibility to everyone, regardless of their NetSuite access. The team at Wellframe, Inc. turned to Charted, formerly SquareWorks Consulting, for a personalized solution to their approval needs.

How Charted helped

Recognizing the complexity of their needs and the lack of a solution in the marketplace, Wellframe, Inc. came to Charted, formerly SquareWorks Consulting, with a detailed idea and motivated team. Charted listened to their biggest pain points and began working on a solution that would bring the controls and visibility that they were looking for.

Project at-a-glance

- ◆ Personalized assessment of business needs and approval hierarchy
- ◆ Project planning and solution design
- ◆ Customization development, including SuiteScripting
- ◆ Delivery of an end-to-end business solution in NetSuite
- ◆ Implementation and go-live

One of Wellframe, Inc.'s primary needs was for all Employees to be able to review and approve NetSuite transactions, regardless of the Employees' access to NetSuite. Additionally, they wanted to develop a flexible and dynamic process that would both support their hierarchy structure and would be fully compatible with vendor bills and purchase orders.



"I had a lot of comments of details that I wanted to add to the solution – the team was so receptive and they kept going until I was comfortable – I felt like they really wanted to get it right as well and make it to be exactly what we were looking for."

Ashley Rowe

Finance and Accounting
Manager

"I really appreciated how much attention to detail Charted had – from drafting out the process outline to how we wanted the end product to look."

Ashley Rowe, Finance and Accounting Manager, Wellframe, Inc

The Charted team focused on solving the pain points as quickly as possible and came up with a scalable design that would enhance their email and In-NetSuite approval experience while allowing them to easily maintain approval hierarchies for any transaction in NetSuite. Ashley Rowe explains "as soon as we started talking, Charted made us feel like a priority – they got back to us almost immediately, and their turnaround time on getting what we needed to review the contract was so quick. This type of responsiveness was a huge factor for us."

Project execution

In order to ensure that the solution would meet these needs, Charted and Wellframe, Inc. came up with a list of potential scenarios to ensure the approval hierarchy would work as expected. The testing took a few iterations, and the team at Wellframe, Inc. came back with new details and requirements they thought of as the development process went on. These requests were accepted and added seamlessly to the final solution.

The implementation itself was supported by a mix of team members from Wellframe, Inc, representing their finance and accounting department, as well as their IT department. These project members were excited about developing the organization's control and reviewing processes, and provided a variety of scenarios that fit across departments.

Project results and productization

After an extensive testing process, the team at Charted was ready to launch the approval automation solution. The team at Wellframe, Inc. was highly satisfied with the final product and began using it. The feedback from Wellframe, Inc. praised how well the email integration worked for their team members – the message itself was intuitive and simplified, saving them time in the approval process and giving visibility into the request without leaving their email inbox. Charted decided to productize this solution and the result, Charted Approval Automation for NetSuite.



“Even more so than the time piece, it’s more that we’re getting the controls that we need to be done, done. It is definitely shaving off time in our approval flow – and being able to be confident that each invoice has been fully approved is great for our team.”

Ashley Rowe

Finance and Accounting
Manager

Success metrics

The final product extended visibility into the approval process without requiring more NetSuite Licenses. Wellframe, Inc. is able to enforce a centralized approval process while limiting their NetSuite access to those employees who require it, thus maintaining their budget and ERP controls.

“The fact that we’re able to have them communicate within NetSuite through these email approvals regardless of if they have access to NetSuite – and still be able to have visibility into NetSuite – has been huge.”

Ashley Rowe, Finance and Accounting Manager, Wellframe, Inc

Wellframe, Inc. has been able to save time in their approval flow and instill a sense of confidence in the employees who are submitting approval requests. The visibility into their approval process has given everyone a sense of ownership over what they are spending and how that fits into the goals of the organization as a whole.

To learn more about Charted Approval Automation and how to enhance your NetSuite approval experience, click [here](#).

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