

Case study

Unlimited file storage in NetSuite delivers key efficiency gains for Superior Environmental Solutions



SES

Superior Environmental Solutions (SES) is on the leading edge when it comes to storing digital documents as attachments in NetSuite. The high volume of documents is primarily driven by their sales and financial processes. Following their NetSuite implementation, SES approached their storage capacity very rapidly and they started looking for a cost-effective solution that would allow them to easily attach documents in NetSuite via drag-and-drop, without worrying about running out of space.

The SES team turned to Charted, formerly SquareWorks Consulting, to solve this problem with Advanced Document Management for NetSuite, which would give them the usability that they were looking for to attach files to any NetSuite record with unlimited storage. This solution worked seamlessly with their NetSuite environment allowing them store and attach supporting documentation, such as bills and quotes, to records throughout their invoice process, as well as create a centralized spot to store all of these important files.

The solution was implemented in a matter of days, and the SES team quickly adopted all new functionality, including the ability to require an attachment for some records in NetSuite. All these features combined allowed them to save hours of file management work and focus on more strategic activities to continue to grow the business.



"Charted Advanced Document Management has been so easy for the team to adopt and helps us to make sure we have attachments everywhere. We were able to set up the solution so attachments are always required. This solution has helped our team to make sure people aren't forgetting to attach documents to records and helps us from having to look for things later."

Lauren Dolby, CPA, MBA, Controller, Superior Environmental Solutions

To learn more about Charted Advanced Document Management, click [here](#).

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