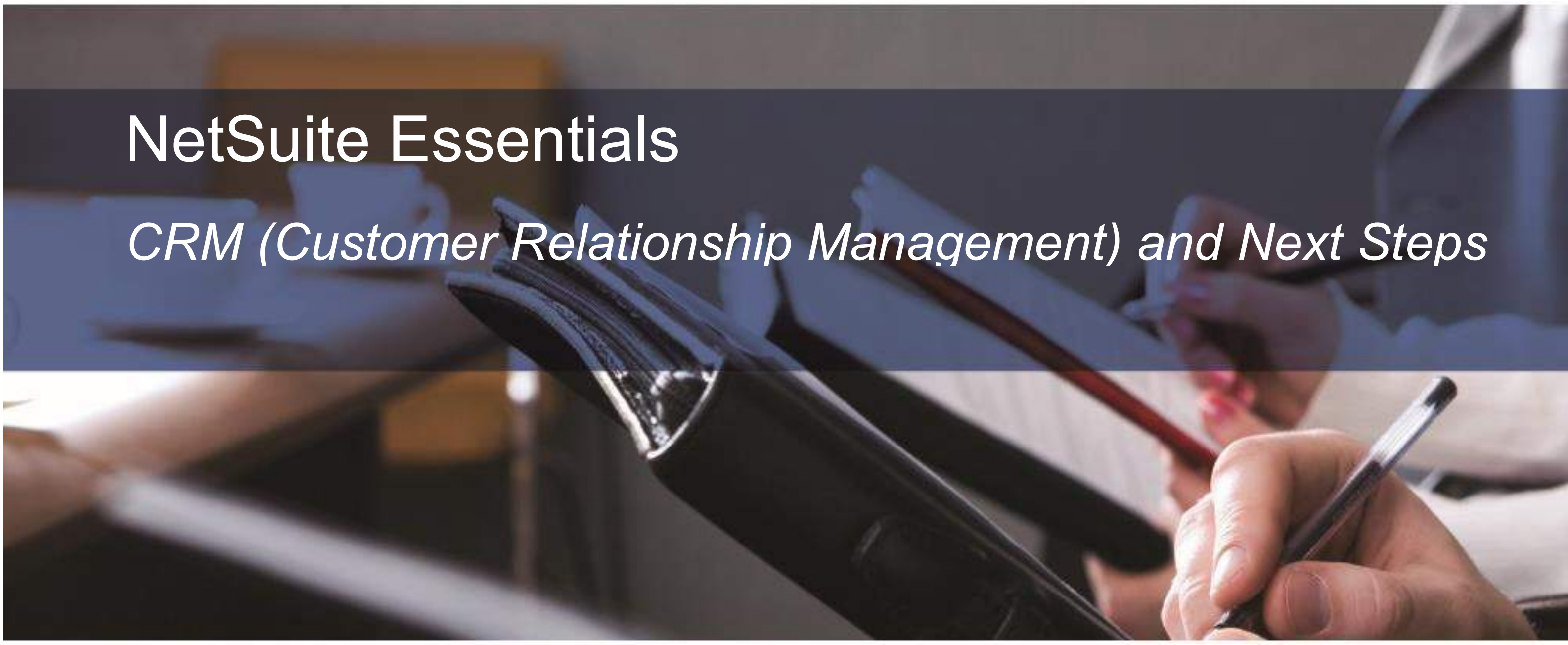
NETSUITE | SuiteTraining



NetSuite Essentials

CRM (Customer Relationship Management) and Next Steps

Contents

ERP Part 2: Recap and Review

Review Day 4: ERP Part 2

Let's review and recap key points from yesterday's topics:

- Accounts Receivable
- Purchasing
- Accounts Payable
- Banking and GL
- Reports and Searches
- Dashboards for Users

Accounts Receivables – Invoicing and Payment Process

Accounts receivable tracks unpaid goods or services:

- Initiated by the sales process when customer owes money in exchange for goods and services provided

Invoicing process**:**

- A Sales Order is **Pending Billing**
- AR staff bill the sales order to create an **Invoice**
- Print, fax, or email the invoice to the customer
- The invoice reflects in the A/R aging report and on the customer record
- The invoice remains **Open** until receipt of customer payment

Payment process:

- Review open Invoices
- Accept payments from customers

Additional Accounts Receivables Tasks

A/R staff also has access to the following:

- Go to **Transactions > Sales > Create Invoices** to enter an invoice for a transaction with immediate and payment on terms; invoice remains open until paid
- Go to **Transactions > Customers > Generate Statements** to generate statements for customers
- Go to **Transactions > Customers > Record Customer Deposits** for a payment that cannot readily be assigned to an existing transaction or customer pays in advance for an order or a project
- Use the **Create Deposit** button on a Sales Order
- Go to **Transactions > Customers > Issue Credit Memos** to decrease the amount a customer owes, deduct the credit from the total amount due
- Use **Return Authorizations** and **Customer Refunds**

Purchasing

Manage purchasing in NetSuite through features and preferences:

- Use purchase requests and/or purchase orders to replenish inventory and supplies
- Set up purchasing approvals, if required
- Purchase Orders: Authorize vendors to provide items, materials or services to your company

Purchase Requests and Approval

Purchase Requests are optional; they are requests to purchase goods and services, but not authorization to purchase:

- **Switch roles > Employee Center – Purchases** portlet > **Enter Purchase Requests**
- Saved with a status of **Pending Supervisor Approval**
- NetSuite routes the request to the appropriate Purchase Approver:
    - **Setup Reminders**, on the dashboard, to display the Standard Reminder **– Purchase Requests to Approve**

Purchase Orders authorize vendors to provide items, materials or services to your company:

- Track items that you have received and have yet to be received
- Navigate to **Transactions > Purchases/Vendors > Enter Purchase Orders**

Receive Purchase Orders

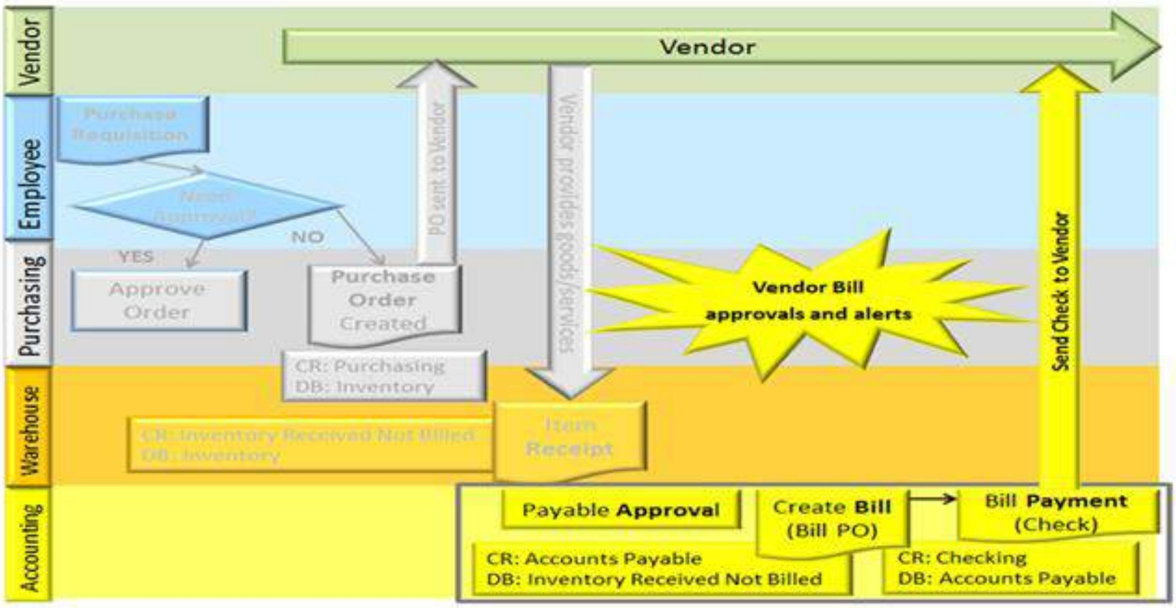
Navigate to **Transactions > Purchases/Vendors > Receive Orders** to fully or partially receive a purchase order:

- The **Receive Orders** page may be filtered by **Vendor**
- Review **Posting Period** and **Date**, use **Filters** if necessary
- Click the **Receive** checkbox for Purchase Orders to be received and click **Submit** and submit to process the purchase order(s) without review the item receipts OR
- Click on the **Receive** hyperlink to view the **New Item Receipt** and review before receiving

!	**Important!** the vendor has shipped everything they can and no more items expected; **Bill** the PO for items received, then close the PO

Accounts Payable

Effectively manage payables (debts) and payment activities with your vendors:



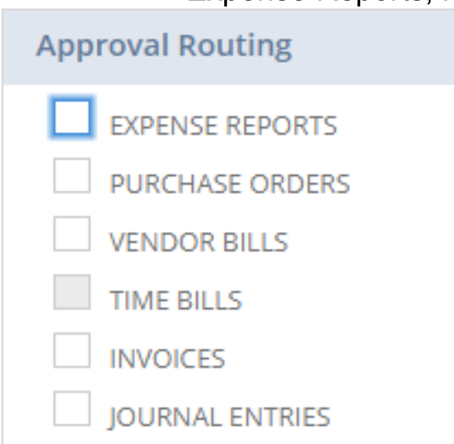
- Enter and approve bills
- Bill purchase orders
  - Receiving an invoice from a vendor for items purchased creates a bill in Accounts Payable using the Bill purchase order page
- Pay Bills

Default Status and Custom Approval Routing

Select Accounting Preferences to effectively manage your payables; navigate to **Setup > Accounting > Accounting Preferences:**

- **> Order Management** subtab, scroll down to the **Vendor Bill** section:
  - Set **Default Vendor Bill Status** to either **Pending Approval** or **Approved**
  - **Standard approval routing enforces strong AP approval processes** and is useful for companies with straightforward AP processes

- **>Approval Routing** subtab to use custom, more flexible approval process:
  - Use in conjunction with SuiteFlow, Workflow Manager
  - Useful for companies with more complicated approval processes
  - Select Approval Routing for any or all the following:
    - Expense Reports, Purchase Orders, Vendor Bills, Invoices



NETSUITE | SuiteTraining

Banking and General Ledger Tasks

Work with and manage the following:

- **Memorized transactions**:
  - Save time by creating a memorized transaction, setting up the transaction to recur over time
- **Journal Entries**, both standard and inter-company:
  - Adjust balances in your ledger accounts and across companies
  - Enter manually or use the import function
- **Banking activities**:
  - Write checks or “spend money”
  - Record deposits, transfer of funds
  - Import banking data and reconcile accounts
- **Accounting periods**:
  - Maintain open/closed periods and accounting period window
  - Use the period close checklist to complete all required, closing tasks

Reports: Point-in-Time Analysis

Take advantage of standard reports, then customize if necessary:

- Familiarize yourself with records and fields
- Work the Report Builder to:
  - Edit columns
  - Filter the data
  - Sort the information
  - Set report options and audience

Searches – Actionable List of Results

Saved searches provide another way to expose data and get a dynamic list of results:

- Create saved searches for both standard and custom record types
- Expose standard and custom fields
- Access to records is dictated by your role
- Make saved searches available throughout NetSuite
- Work with criteria, results and highlighting
- View the refreshed results each time you run the saved search

Best Practices: Reports and Searches

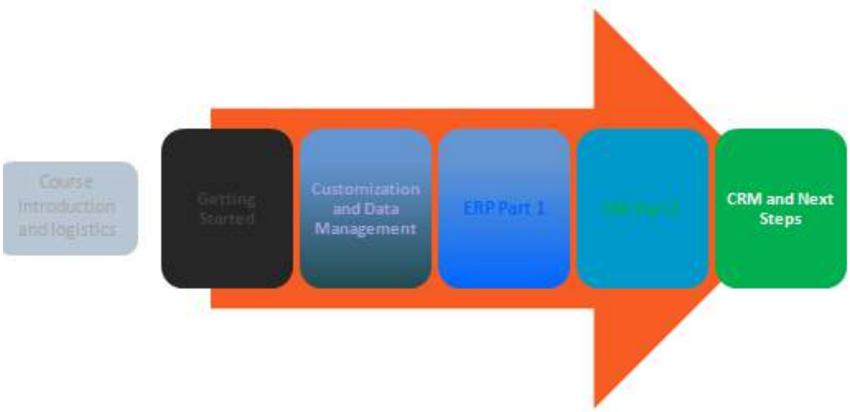
- Create and follow a standard title naming convention
- Test your report and search before making available
- Include search criteria in search results to confirm that results are what you need
- Save report customization and search criteria OFTEN
- Use **Save and Run** function to preview search results
    - Use the Audit Trail (Administrators) for searches and reports to view:
    - All changes made to a saved search/report definition.
- Manage All Saved Reports and All Saved Searches with inline editing; begin at the Reports Overview page

Review Questions

Answer the following questions:

1. A ________ ____________ decreases the amount a customer owes.
2. True or False: An Invoice is open until paid.
3. Can I accept money from a customer, in advance of an order in the system? If so, how? __________________________________
4. I received a partial quantity of P.O. line item; the vendor will never ship the remaining quantity. How should I handle the PO and billing the PO? ____
5. I need more control of purchase orders approvals. What can I do in NetSuite? ____
6. How can I maintain more control over Vendor Bills and the payment of those bills? _______________________________________
7. I want to save data entry time on a transaction that occurs monthly. What type of action can I take on a transaction? ________________________________
8. I need to start closing accounting periods. What do I do? ______________________________
9. True or False: Reports cannot be customized
10. True or False: Saved searches only expose standard NetSuite fields

ERP Part 1 is done, next CRM and Next Steps



Sales Force Automation (SFA)

About this Module

Time is money! Empower your sales force with information and tools they need to close more deals in timely fashion. You may be wondering:

- Which features and preferences need to be considered?
- Is there a way to automate lead assignment?
- Can we capture lead information, in NetSuite, through a landing page or web form?

Objectives

1. Describe the Lead-to-Customer life cycle and process
2. Define sales process terminology
3. Describe stages, statuses and probability percentages
4. Set up the sales force automation features
5. Create sales rules and territories for automated Lead assignment
6. Create online forms to capture new Leads
7. Add customized sales persons notifications to online form submissions

Terminology: Stages of an Entity

Lead: An unqualified potential Customer that is in the first stage of the sales cycle and might progress to the Prospect stage

- Can be created manually, through an online web form or through mass import
- Do not have any quotes/estimates, Opportunities or transactions associated with them

Prospect: A qualified Lead who shows interest in your company or products

- Do not have any sales orders, invoices, cash sales or other sales transactions associated with them

Customer: An individual or company that has purchased items from you

- Has an existing invoice or sales order

Terminology: Sales Transactions

Opportunity: Puts a monetary value on a deal

- Creation of an Opportunity moves record from Lead to Prospect

Estimate or Quote: Estimate or quote of the price or scope of work for items or services

- When the Customer accepts, estimates are converted into sales orders, invoices or cash sales

Sales Orders: Commitment to sell items or services to a Customer

- Can be created from Opportunity or estimate records
- Have no accounting impact until items are shipped or services are completed

Lead-to-Customer Life Cycle

Manages the entire sales process from lead to sale and post-sales:

- Complete customer-purchase histories enable sales reps to serve customers better and increase profitability
- Create a unique Lead-to-Customer workflow for each sales team

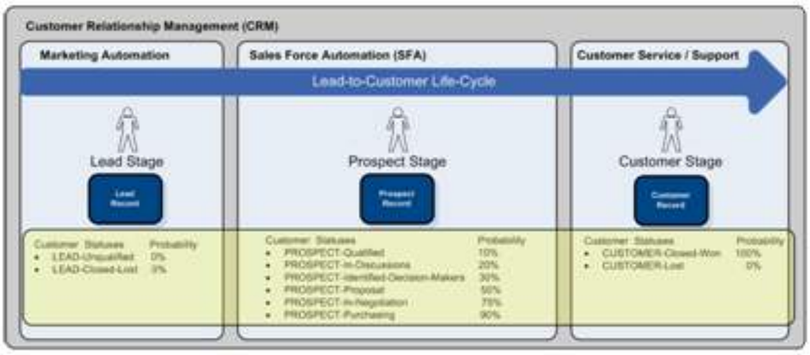
General Process:

- Sales reps qualify Leads to determine their commitment to buy
- A qualified lead is converted to a Prospect
- The Prospect purchases and is converted to a Customer

Status and Probability Values

Use several statuses, with probabilities, per stage for accurate tracking of Lead-to-Prospect and Prospect-to-Customer conversions:

- Create these values to support your unique sales process
- Use the percentages to track how likely the deal is to close

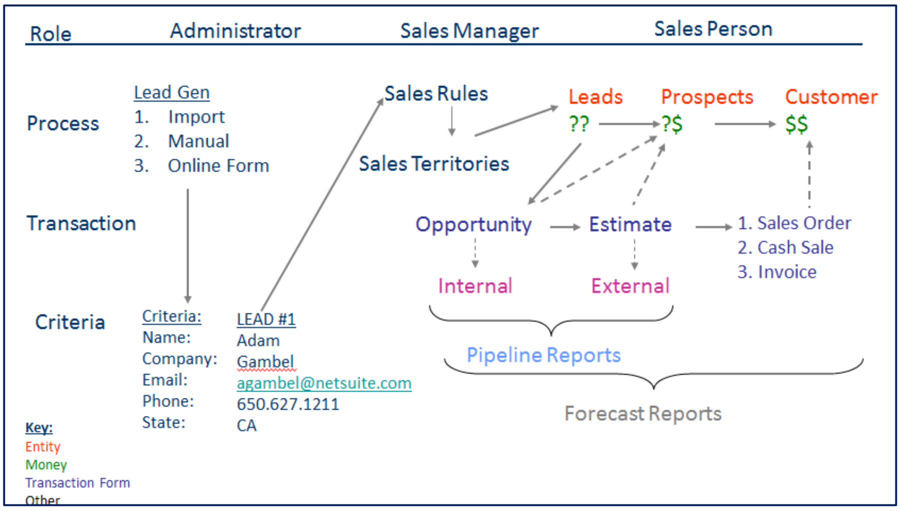


Lead-to-Customer Process

Lead-to-Customer Process

This graphic represents the Administrator working with the Sales Manager to:

- Understand how leads are generated
- Identify required criteria for sales rules
- Design the sales rule
- Build the territory, assign the rule and sale rep
- A new lead comes in and is routed to the appropriate rep to:
  - Qualify the lead, create an opportunity and save it
  - Lead converts to a prospect and the sales rep can send them an Estimate
  - Estimate is converted to a sales order and the prospect converts to a customer
- Pipeline reports can include opportunities and estimate
- Forecasts can include opportunities, estimates, and order



Leads that are not qualified can be: 1) left in the system as unqualified, 2) inactivated through a mass update, or 3) identified as archived (change the lead status to "archived" or "unqualified" by customizing the Customer status list)

- Lead Tips
  - A company attending a trade-show collects a lot of new leads. The sales representative working the trade show can enter leads directly into NetSuite if they have access or they can enter the list of new leads to an Excel spreadsheet and import the file later via .CSV
  - Do a data scrub before importing your leads so you only bring qualified leads into NetSuite
  - ***Note:*** Return an opportunity to the lead stage at any time by changing its status.

Sales Considerations

What will be important to you?

- Lead generation, routing and assignment
- Opportunity management
- Forecasting
- Up-selling and cross-selling
- Communications
- Incentive management
- Partner management
- Reporting: which metrics do you need to manage your sales business?
- *OneWorld:* You can choose to set a sales rule based on a subsidiary

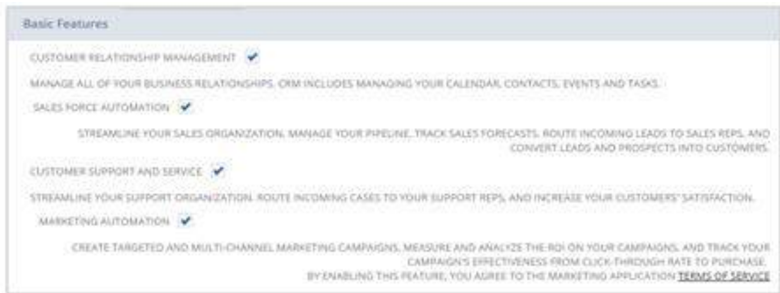
Walkthrough: Set Up Sales Force Automation

Enable Features
Set Up Employees as Sales Reps
Define Sales Preferences

Use Case: The Sales Manager has mapped out the sales processes and now the Administrator begins to configure NetSuite to accommodate these processes.

Enable Features

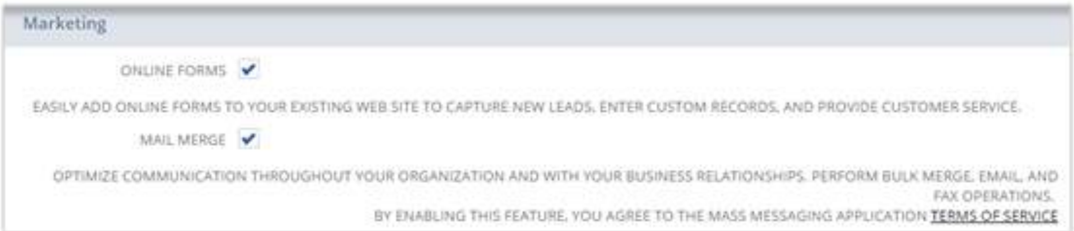
Setup > Company > Enable Features > CRM subtab for the CRM features that facilitate sales activities:



- **Basic Features:**
  - **Customer Relationship Management**: Access lists of the companies and contacts you do business with. Create tasks and keep a calendar
  - **Sales Force Automation:** Set up and manage sales territories, and automatically prioritize and assign Leads within those territories.

- o **Marketing Automation:** To facilitate multi-channel campaigns and tracking effectiveness.
- **Sales:**
  - o **Opportunities:** Allow you to track sales Opportunities

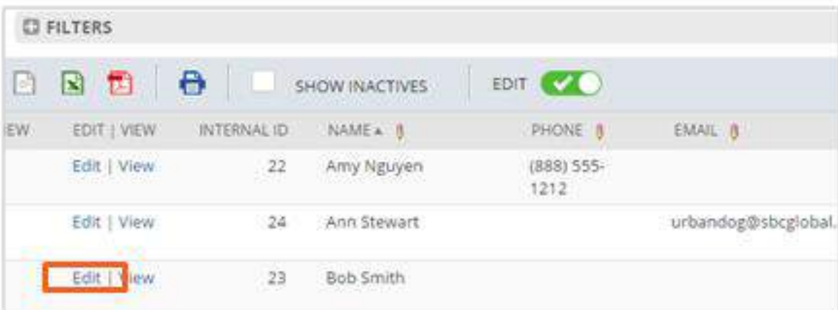
  - o Not all sales organizations will take advantage of the opportunities feature
  - o The opportunities feature has an impact on the automated process of converting a Lead to a Prospect however; if your company does not use opportunities, you can still manually progress the Lead to a Prospect by changing the customer record status.
- **Marketing:**



  - o **Online Forms:** We want to enable this to facilitate capturing new lead information.
  - o **Mail Merge:** We want to enable this to allow adding attachments to emails.

Set Up Employees as Sale Reps

Employees must be selected as Sales Reps to include them on sales order forms or sales territory assignments; navigate to **Lists > Employees > Employees** and **Edit** the employee record



- Navigate to **Lists > Employees > Employees** and **Edit** the employee record
- Go to the **Human Resources** subtab
    - Select the **Sales Rep** check box

- Go to the **Access** subtab, **Roles** sublist
    - Assign a **Sales** role

- **Save**

Set Sales Preferences

How do you plan to use the Sales Force Automation feature? The defined General and Forecast preferences are companywide. Navigate to **Setup > Sales > Sales Preferences:**

- **General** subtab:
    - Define the various Statuses
    - Select restrictions
    - Define Quote Expiration date
    - And other settings

- **Forecasts** subtab:
    - Name or labels for forecast levels
    - Define what forecast includes
    - Define when forecast runs
    - Select editing options

NETSUITE | SuiteTraining

Walkthrough: Statuses, Rules and Territories

- Create Customer Statuses
- Create Sales Rules
- Create Sales Territories
- Manage Sales Territories

Use Case: As new leads come into the NetSuite account, lead automation will be utilized to assign those new leads. This function will be facilitated by some initial sales set up, including rules and territories. Also, consider of the territory stacking and the round robin sales territory.

Create Customer Statuses

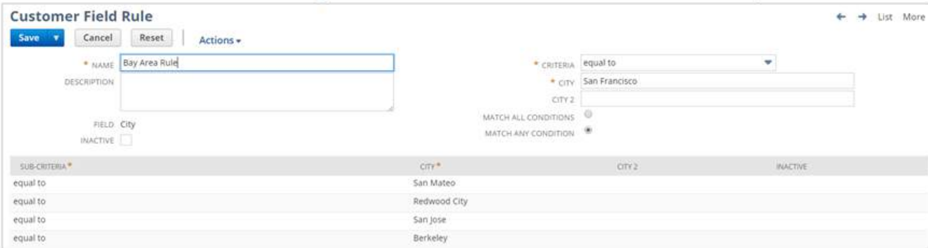
Go to **Setup > Sales > Customer Status > New** to create and use several statuses, with varying probabilities, for the prospect stage:

- Enter a name for the **Status**
- Select the appropriate **Stage**
- Set the **Probability;** use the following as guidelines for the different stages:
    - Leads have a 0% probability
    - Prospects have 1 – 99% probabilities
    - Current Customers have 100% probability, Lost Customer set at 0%

Statuses help you track Leads, Prospects, and Customers through the sales cycle

Create Sales Rules

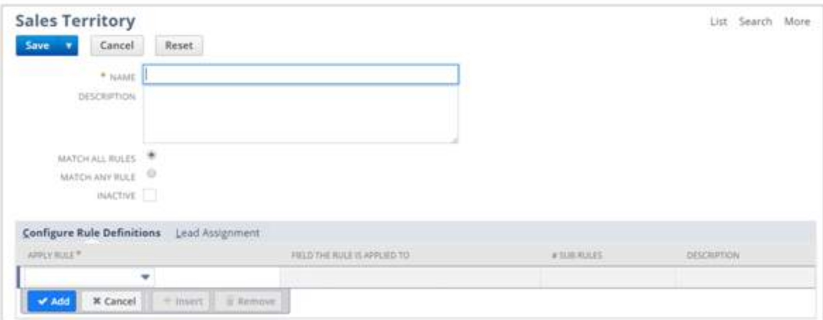
Use Case: Sales rule to be defined by the city a customer does business in; limit to cities in the San Francisco Bay Area



- Go to **Setup > Sales > Sales Rules > New** to use standard and custom fields on the customer (lead, prospect, or customer) record, e.g. City
- Enter a **Name** and provide an optional description
- Specify the **Criteria**, e.g. equal to and enter in the first **City – San Francisco**
- Go down to **Sub-Criteria** to enter other cities such as:
    - equal to – San Mateo
    - equal to – Redwood city…etcetera
- Review the radio buttons **Match All Conditions** or **Match Any Condition**
    - This use case needs Match Any Condition

Create Sales Territories

Sales territories use sales rules to distribute assign potential Customers; information in Lead, Prospect, or Customer's record must match criteria of the sales rule to be assigned to that territory



- Go to **Setup > Sales > Sales Territories > New**
    - Enter a **Name** and an optional Description
    - Select either **Match All Rules** or **Match Any Rule**
    - **Configure Rule Definitions** subtab, and add a value for **Apply Rule**
    - **Lead Assignment** subtab, add **Sales Reps**
    - **Save**

- Default Round-Robin Territory:
  - Automatically distributes Leads evenly among sales reps
  - Net Suite provides a Default Round-Robin territory:
  - Customers not matching a sales rule are unassigned; they are then assigned manually or distributed by the Round Robin sales territory
  - If Round Robin is your only necessary territory requirement, then you must edit the territory and add the sales reps

Manage Sales Territories

Review the sales territory stacking to further optimize sales force automation:

- Go to **Setup > Sales > Sales Territories** and view the **Manage Sales Territories** page
- Adjust order of territories**, Move to Top** or **Move to Bottom** or drag and drop, to adjust assignment
  - Default Round–Robin should probably remain last
  - Click on **Default Round-Robin** to **Edit** and add Sales Reps
    - Potential Customers not matching sales rules are unassigned; they can be assigned manually or distributed by the Round Robin sales territory
    - Automatically distributes Leads evenly among sales reps

Activity: True or False

Indicate if the statement is true or false.
1. Employees are available for assignment to a customer or sales transaction only if the Sale Rep check box is selected on the employee record
2. Only a single rule may be applied to a territory
3. You must set up additional territories, in addition to the Round Robin

Walkthrough: Capture Lead Information

Create Online Customer Form

Use Case: The Company would like to have a web page or web form to allow site visitors to enter their own contact information. This information needs to automatically populate a lead record in NetSuite.

Create Online Customer Form

Go to **Setup > Marketing > Online Customer Forms > New** to create a form that captures new lead information and creates new records:

- **Select Type**: with the Marketing Automation feature enabled, you can choose the Default Form Template

- **Title:** Displays at the top of the form and the Web tab

- **Message**: Introduction to the form, use rich text editing
- **Enable Online**: Makes form accessible online
- **Select Fields** to add fields needed for your requirements:
    - Select the field, mark as mandatory any field that will feed into your sales rule, such as city
    - Label may be changed
    - Width may be changed
    - Mark mandatory any field that is important to your sales rules
    - Search for potential duplicates
    - For each selected field on the Select Fields subtab, you can check the boxes in the Update Customer and Update Contact columns to define which record type is updated when the form is submitted.
        - The new columns only apply to online customer forms that create customers as companies. The Update Contact column is not used for customers that are created as individuals.

Detail Message

Go to the **Detail Message** subtab to enter a **Detail Message** to display at the bottom of the form:

- Considering setting expectations for the submitter
  - Perhaps providing the customer a message such as: “Thank you for providing some information. A sales rep will be in touch within two business days.”
- Use rich text editing, or toggle to html

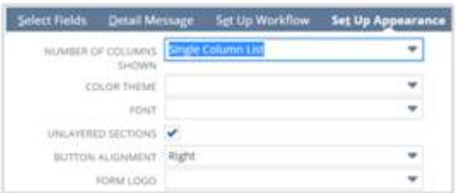
Set Up Workflow

On the **Setup Workflow Subtab,** set the following per your needs:

- **Preferences**, for example**:**
  - Consider the **Create Customers as Companies** setting
  - Review **Status** and **Update** settings for **Lead** and **Lead Source**
  - **Redirect to Form** or **Redirect to URL**
  - Define **Handle Duplicate Records** and **User Duplicate Detection Criteria**
- **Customer Notification:**
  - **Send Auto-Reply Email:** select a template to use when generating an automatic reply to the customer
- **Sales Rep Notification:**
  - Select **Send Notification Email** check box; the customer’s sales rep can receive a notification regarding the lead
  - Select **Template for New Leads** and **Template for Existing Customer**

Set Up Appearance and Save the Form

Go to the **Set Up Appearance** subtab to define the appearance of your form, considering your company's branding and requirements:



- Select your preference for **Number of Columns Shown**
- Select a **Color Theme**
- Select a **Font** for the displayed field names
- Recommend leaving **Unlayered Sections** as checked to avoid form displaying with tabbed sections
- Define the **Button Alignment**
- Select a **Form Logo,** the image may already be residing in your file cabinet or can be added to your file cabinet

Save the form

- Once the form is submitted, online form submission information is available on the contact record (person entering the form), the marketing subtab.

Publishable Form URL

View a saved online form at **Setup > Marketing > Online Customer Forms** and test the form**:**

- Go to the **External** subtab to view/access the following information
    - **Number of Requests:** number of times the form was accessed
    - **Number of Submits:** number of times the form was submitted
    - **Internal Form URL:** use this to URL to publish the form on a tab inside your NetSuite account; requires user access to your NetSuite account
    - **Publishable Form URL**
        - Use this URL to access the form outside of NetSuite application
        - The **Enable Online** check box must be checked
        - As the administrator, you will use this URL to **test the form**

Best Practices: Setting Up SFA

- Create a storyboard of your qualification process:
  - Break it down into important stages, events, decision points, and so forth
  - Draw lines between each point to show relationships and flow
- Change standard statuses and stages to match familiar terminology
- Decide between using individual sales reps or sales teams
  - Impact of turning on and turning off team selling
    - If you start with team selling and set up rules and territories, then move away from team selling, there are impacts to be aware of:
      - Minimal effect on rules and territories
      - If there are transactions referencing multiple people on the Team Selling tab, you will lose all team selling data. Essentially the subtab gets replaced with a single Sales Representative field
      - This will also affect commissions
    - **Note:** turn off team selling and then make use of the territory reassignment
- Identify sales reps for territories before you build your territories
- Track online form submissions on the **Contact** record, **Marketing** subtab

Now It's Your Turn

01: Enable Sales Force Automation
02: Set Up an Employee as a Sales Representative
03: Set Sales Preferences
04: Create Customer Statuses
05: Create a Sales Rule
06: Create a Sales Territory
07: Create a Sales Territory

Use Case: Configure NetSuite for Sales Force Automation

- Enable features, define preferences, set up sales reps, define rules, and assign territories
- Create an online form to capture lead information
- Allow 35 – 45 minutes

Exercise 01: Enable Sales Force Automation

Time: 1-2 minutes

Scenario: The Chatham Company intends to implement Sales Force Automation as part of Phase 1 of its implementation process. In this exercise:

- Enable Sales Force Automation (SFA) features

1 Switch back to **Administrator** role if necessary.

2 Navigate to **Setup > Company > Enable Features**.

3 The **Enable Features** page displays; click the **CRM** subtab.

   a. Ensure that the boxes for the following features are checked.

   b. In the **Basic Features** section:

      i. Customer Relationship Management

      ii. Sales Force Automation

      iii. Marketing Automation

      iv. Note: Marketing Automation should be enabled so you can select between the Default Form Template and the Custom HTML Template in a later exercise. **To enable Marketing Automation, you must agree to the Terms of Service first.**

   c. In the **Sales** section:

      i. Opportunities

   d. In the **Marketing** section:

      i. Online Forms

      ii. **Mail Merge** (this allows adding attachments, and other functionality, to emails)

      iii. Note: If other options are currently checked, leave them as is!

4 Click **Save**.

5 **End.**

Exercise 02: Set Up an Employee as Sales Representative

Time: 1-2 minutes

Scenario: Employees must be referenced as a Sales Rep for assignment to a sales territory. In this exercise:

- Set up an employee as a sales representative Switch back to A**dministrator** role if necessary.

1 Navigate to **Lists > Employees > Employees**.

a. Ensure that the View filter, top of the page, is set to All.

2 In the **Name** column, **locate your login** or whichever login name at top-right of page specifies, and click the **Edit** link.

a. Note: Make sure that you are using the Standard Employee form.

b. In the **Primary Information** section:

i. In the **Job Title** field, enter Sales Representative.

c. Click the **Human Resources** subtab.

i. Check the **Sales Rep** box.

3 Click **Save**.

4 End.

Exercise 03: Set Sales Preferences

Time: 1-2 minutes

Scenario: Administrators set default statuses for Lead, Prospect, and Customer records to define workflow automation when new records are added. In this exercise:

- Set the SFA preferences for your company

1 Navigate to **Setup > Sales > Sales Preferences**.

2 In the **General** subtab, ensure that the fields are completed as follows.

   a. These fields tell NetSuite what status to use for the potential customer in each situation:

   b. Lead Status: **Unqualified**

   c. Prospect Status New **- Qualified Prospect** ✓

   d. Prospect Status - Opportunity: **In Discussion**

   e. Prospect Status – Quote**: Proposal**

   f. Customer Status: **Closed Won**

   g. Standard Sales Roles: **Unrestricted**

      i. Note: This will allow viewing and editing any records or transactions that the role has permission to work with.

   h. Default Quote Expiration (in days): **30**

   i. Click **Save**.

3 End.

Exercise 04: Create Customer Statuses

Time: 1-2 minutes

Scenario: Chatham Company's BRD requirements outline the need for users to track customers at all stages of the sale.

In this exercise:

- Create customer statuses

1 Navigate to **Setup > Sales > Customer Statuses > New.**

   a. In the Status field, enter **Reviewing Quote**.

   b. In the Stage field, select **Prospec**t.

   c. In the Probability field, enter **65.**

   d. In the Description field, enter:

      i. **The prospect is reviewing the proposed quote**.

   e. Select or leave Include in Lead Reports as checked so that records with this status will display in lead reports.

   f. Click **Save.**

   g. Note: If you get the message "This record already exists", then click Go Back.

   h. Set the Stage to Prospect again, if necessary, and click Save again. Click OK in the pop-up window.

Test the Customer Status

2 Navigate to **Lists > Relationships > Prospects > New**.

   a. In the Status field, click the dropdown arrow and select the PROSPECT-Reviewing-Quote. This is the customer status that you just created.

   b. Notice that the Probability value changed to 65.0%, allowing you to track the progress of this prospect.

3 Click the Home tab. **Do not save the prospect record**.

4 End.

Exercise 05: Create a Sales Rule

Time: 1-2 minutes

Scenario: Rules and territories can automate lead assignment. Rules can be defined on standard and custom fields.

When a new lead is added, the lead is evaluated against a sales rule and territory. The lead is then routed to the appropriate sales rep.

In this exercise:

- Create a sales rule based on the State field

1. **Navigate to Setup > Sales > Sales Rules > New**.
2. On the **Select a Customer Rule Field** page:
    a. Scroll down and click the **State** link. The new rule will apply to this field.
    b. In the **Name** field, enter Eastern Sales Region Rule.
    c. In the **Description** field, enter Eastern Sales Region.
    d. Notice that this sales rule is based on the State field.
    e. In the Criteria field, select any of.
    f. **From the list of states**, select
        i. Connecticut
        ii. Massachusetts
        iii. New Jersey,
        iv. New York
        v. Once selected, these four values will be listed in the Current Selections pane on the right side of the window.
        vi. Note: Because this is a OneWorld account, states from a variety of countries are listed in the Choose State window.
3. Click **Done**
4. Click **Save.**
5. **End.**

Exercise 06: Create a Sales Territory

Time: 1-2 minutes

Scenario: The territory is defined by a sales rule (s) and assigned sales reps. In this exercise:

- Create a territory with a selected rule and sales rep

1 **Navigate to Setup > Sales > Sales Territories > New.**

   a. In the **Name** field, enter Eastern Sales Team.

   b. Leave **Match all Rules** selected.

   c. From the **Configure Rule Definitions** subtab, choose the Eastern Sales Region Rule from the **Apply Rule** drop-down and click **Add.**

   d. Click the **Lead Assignment** subtab. Select Amy Nguyen from the Sales Rep dropdown list so all leads that match this rule will be assigned to her.

      i. Don't forget to click **Add.**

         1. Note: Additional sales reps can be added to a territory. If more than one sales rep is assigned to a territory, NetSuite will round-robin the lead assignment between the sales reps on this subtab!

2 **Click Save.**

3 **End.**

NETSUITE | SuiteTraining

Exercise 07: Create an Online Form

Time: 5-10 minutes

Scenario: Chatham wants to use an online form to gather new leads

In this exercise

- Create an online lead generation form
- Test it by adding a new lead through the external form
- Verify that the sales rules and territories assigned the correct sales rep to the new lead

1 Navigate to Setup > Marketing > Online Customer Forms > New.

2 Select **Type Default Form Template.**

   a. In the **Title** field, enter **Welcome to Chatham Company.**

   b. In the **Message** field, enter some text and format as desired.

   c. Ensure that the Enable Online box is checked.

Select the Fields for the Online Form

3 Go to the Select **Fields** subtab.

   a. **Note:** Subsidiary field is used to search for duplicate records in OneWorld accounts, it has been added automatically.

   b. To prevent a field being displayed on a form, mark Hide as Yes.

4 From the **Field dropdown** list, add the following fields**:**

   a. **First Name (check the mandatory column)**

   b. **Last Name (check the mandatory column)**

   c. **Email**

   d. **Company Name (check the mandatory column)**

   e. **Phone Number**

   f. **Address line 1 (Re-name to: "Street Address" using the Label field)**

   g. **City**

   h. **State (check the mandatory column for proper territory routing**

   i. **Zip/Postal Code**

   j. **Increase the Width** of the Company Name and Street Address fields to **50.**

Enter a Message to display on the Form

5 Click the **Detail Message** subtab and enter some text and format as desired. The Detail Message will display at the bottom of the form; below the fields, and the Submit and Reset buttons.

Set Up the New Lead Workflow

6 **Set Up Workflow** subtab to control how NetSuite will handle the incoming leads.

a. Ensure that the **Create Customers as Companies** box is checked.

b. From the **Set Lead Status** field, ensure that Lead-Unqualified is selected as the default and uncheck the allow update box.

c. From the **Set Lead Source** dropdown list, select Web and uncheck the Allow Update on Customer Record and Allow Update on Contact Record boxes.

d. In the **Redirect to URL** field, leave the default website address or change it to a website of your choice but be sure to preface the address with http://www.

   i. Note: When the lead form is submitted, NetSuite will automatically take the user to this website. Commonly, this field defaults to your NetSuite e-commerce website.

e. **Leave Handle duplicate records** with default value and check Use Duplicate Detection Criteria

f. Scroll down to the Sales Rep Notification and check the Send Notification Email box to notify sales reps when new leads derived from this online form are added to NetSuite

   i. Select Template for New Leads – Standard Notification for New Leads

   ii. Select Template for Existing Customers – Standard Notification for Existing Customers

   iii. Please note that if you see forms with 2.0 as part of the names relate to scriptable templates, which is not part of this course. Scriptable templates provide more functionality and customization.

Set Up the Appearance of the Online Form

7 Click the **Set Up Appearance** subtab and select the following:

a. **Number of Columns Shown**: 2

b. **Color** Theme: Your choice

c. **Font**: Verdana (This field controls the font to use for field names, where formatting the font wasn't an option.)

d. **Unlayered Sections**: Checked

e. **Button Alignment**: Center

f. Note: Use the Form Logo field to add a company logo if an image is available.

i. Please refer to SuiteAnswers or Help Center for more information.

8 **Save**

View the Online Form

9 Click the **External** subtab.

a. Or, if you were navigated way from the form then go to Setup > Marketing > Online Customer Forms.

i. Click the **Edit** to view your online form and click the External subtab.

b. Click the **Publishable Form URL** link.

10 **The Website Leads Online Form displays in a new window**. This is how customers will view the form.

a. Note: If it does not display, you may have a browser pop-up blocker.

Test the Online Form

11 **Enter a new lead through the online form. Be creative, but don't forget the customer's name!**

a. Set the state to **New York** for your new lead.

b. Click **Submit** when you have completed the form. Once the form is submitted, you will be re-directed to the URL specified in setup! You can close that browser tab.

12 In NetSuite, **use (Global) Search** to find the Company you just entered.

13 Locate the Lead Record.

a. A Contact should have been added to the Lead record, if you entered information in the first and last name fields.

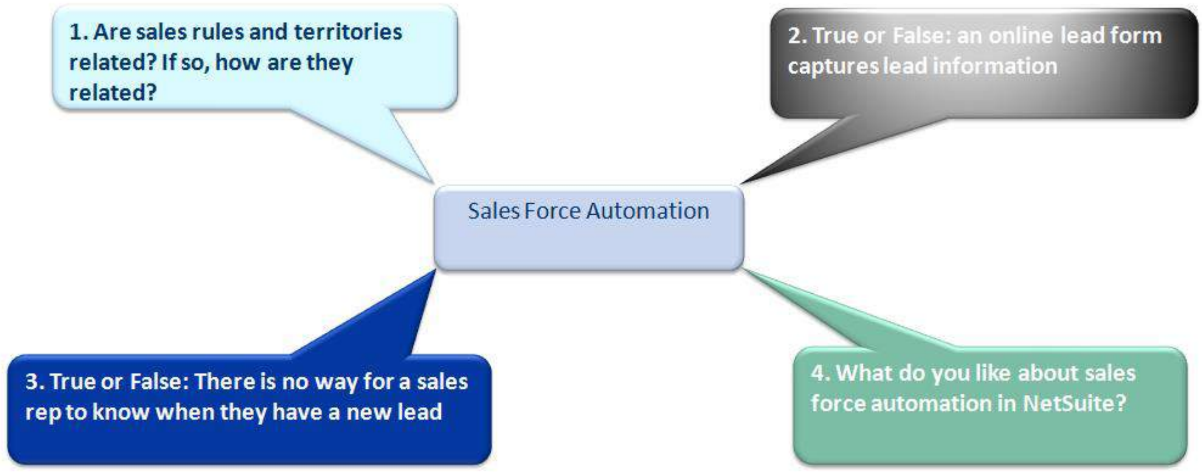
b. Click the View link for the lead record. Confirm that the lead information entered from the online form has populated all the correct fields.

c. If you selected New York as the state on the form, the assigned Sales Rep should be Amy Nguyen, based on the sales rules and territories.

14 **End.**

Activity: Sales Force Automation

After you do the exercises, answer these questions



Additional Resources

NetSuite Help Center:

- Sales Concepts and Setup Guide: User Guide

SuiteAnswers Learning Center:

- New Feature Training
- Sales Force Automation
- Implementing Sales Forecasting in NetSuite

Lead-to-Customer Management

About this Module

With Sales Force Automation (SFA) enabled, and set up, how can it help sales to:

- Better serve customers
- Manage leads through the sales process
- Drive higher close rates

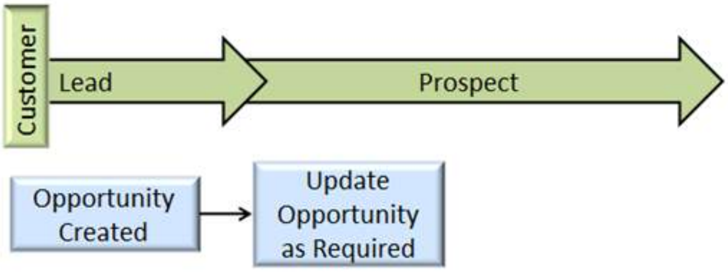
Objectives

1. Describe the Lead-to-Customer process
2. View, create, and qualify Leads
3. Create and manage opportunities
4. Generate quotes and estimates
5. Close a sale and create a sales order
6. Identify the sales pipeline with standard reports and forecasts

Lead-To-Prospect

Creation of an opportunity and associating it with a Lead record converts the Lead to a Prospect

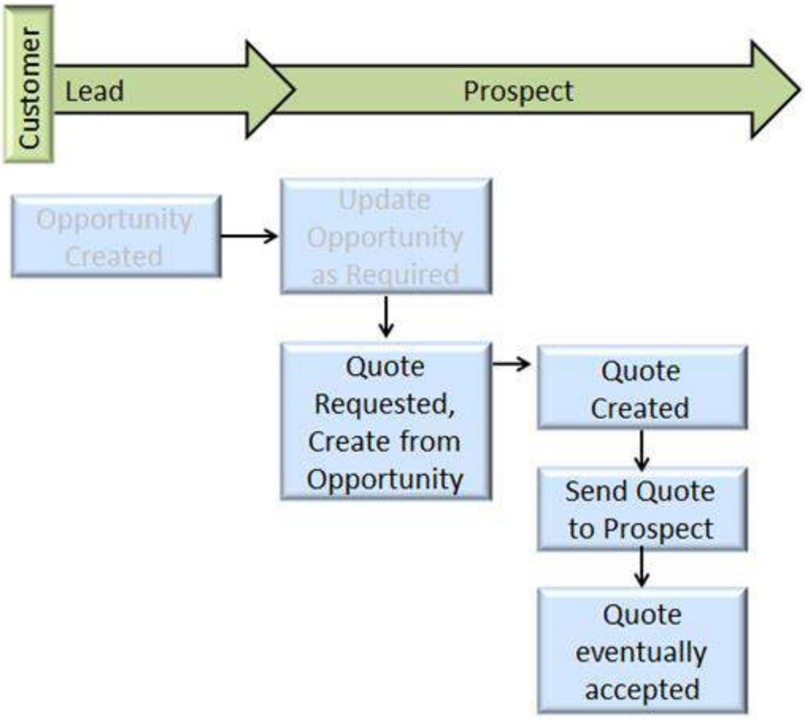
- The **CRM** feature, **Opportunitie**s, must be enabled
    - If not using the Opportunities feature, you can manually convert Leads to Prospects
- An opportunity details the sales representatives' negotiations with prospects
    - Multiple opportunities can be created for a single lead/prospect
- Opportunities are 'internal documents', whereas Estimates are 'external documents' presented to customers



Prospect

Use Opportunities and Quotes with the Prospect record:

- An Estimate/Quote defines the proposed services or products for purchase before a sale order is generated and is a customer-facing document
- Estimate/Quotes can be associated with a Prospect record
    - The Estimate/Quote record is a modified version of the details entered into the opportunity record, however an Estimate/Quote record can be independently created from the Opportunity record
    - Multiple versions of an Estimate/Quote can be created, as customers typically request modifications after their initial review
    - Set an expiration date for the Estimate/Quote and NetSuite will remind you to follow up on the estimate shortly before it expires
- An Estimate/Quote has no accounting impact until it is converted to a Sales Order / Cash Sale / Invoice
- You can print, email or fax an Estimate/Quote to your customer

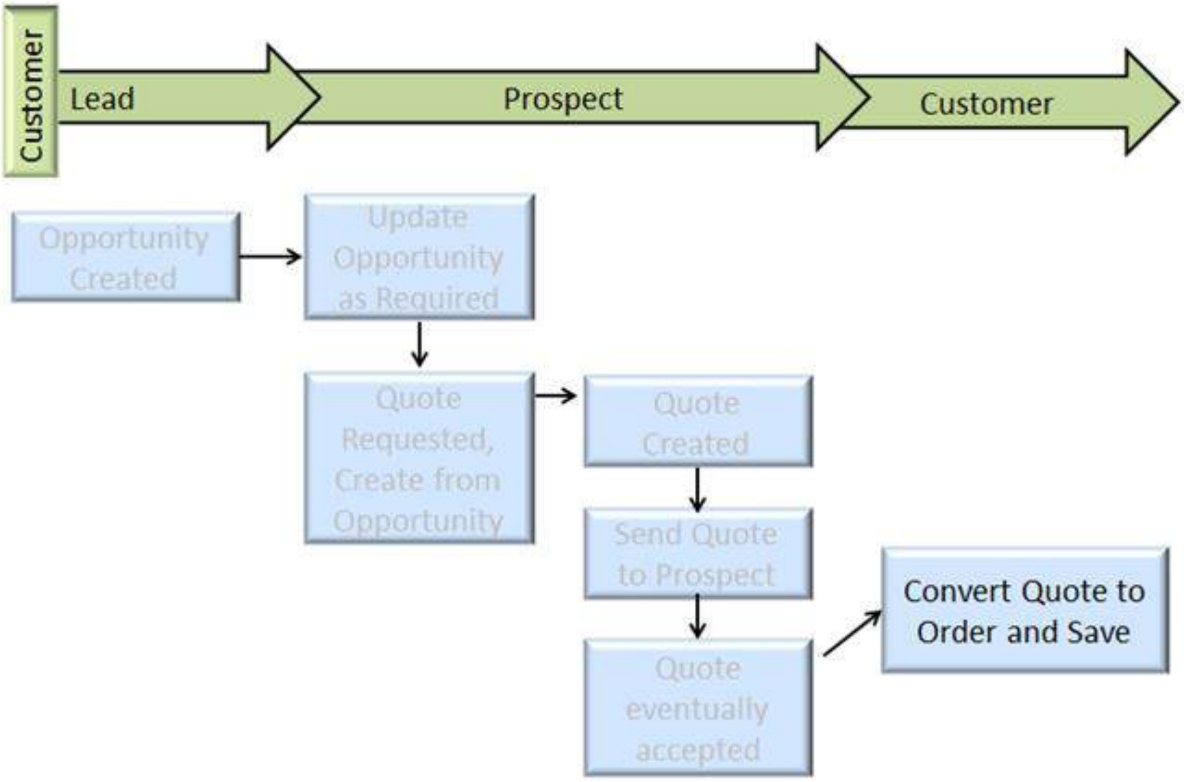


Prospect-To-Customer Conversion

When a sales order is created, Prospects automatically convert to a Customer record:

- Accepted quotes are converted to a cash sale, invoice, or sales order
    - A sales order is the commitment to purchase specific goods and/or services

  Note: If a Prospect is associated with an opportunity record and the opportunity is later closed as ‘won’, the Prospect record is automatically converted into a Customer record



Lead-to-Customer Management

Follow the Lead-to-Customer management process:

- **Leads** come into the system and either **get qualified or marked dead**
  - On online form is submitted
  - An unqualified lead record is created in NetSuite
  - Sales is notified to follow-up with the lead
- A **lead** transforms to a **prospec**t with a saved **Opportunit**y
- Sales **negotiates with the prospect** on quotes, reviews of quotes and eventually placing an order
  - Negotiations are happening
  - CRM activities may include phone calls, meetings or tasks
  - Sales can convert the opportunity to the Quote/Estimate record (several quotes may be created)
- The **Sales Order** is created, the prospect is transformed to a **customer**
  - The Quote/Estimate record is converted to a Sale Order record
  - The Prospect automatically converts to a Customer

Key Sales Tools – Refer to SuiteAnswers

Quick View on Key Records available in all accounts:

- QuickViews are now customizable, based on actions by the administrator**:**
- Especially useful to review lead, prospect and customer records

Last Sales Activity

- A last Sales Activity field is added to all lead, prospect, customer, contact and opportunity records
- Tracks last date a sales activity was performed
- Can be designed as a Dashboard reminder and is configurable

Replying and Forwarding Email from Records and Transactions:

- Useful when communicating with your lead, prospect and customer
- When you view an existing email message, there are three new buttons at the top of the message record: Reply, Reply to All, and Forward

The Enhanced Sales Center SuiteApp

- Provides user interface enhancements to the standard NetSuite Sales Center.
- The new Sales Center is designed to make information that is relevant to sales users easily available to them through better organized tabs, forms, links, and dashboards.

Walkthrough: Lead-to-Qualified Lead

View a Lead

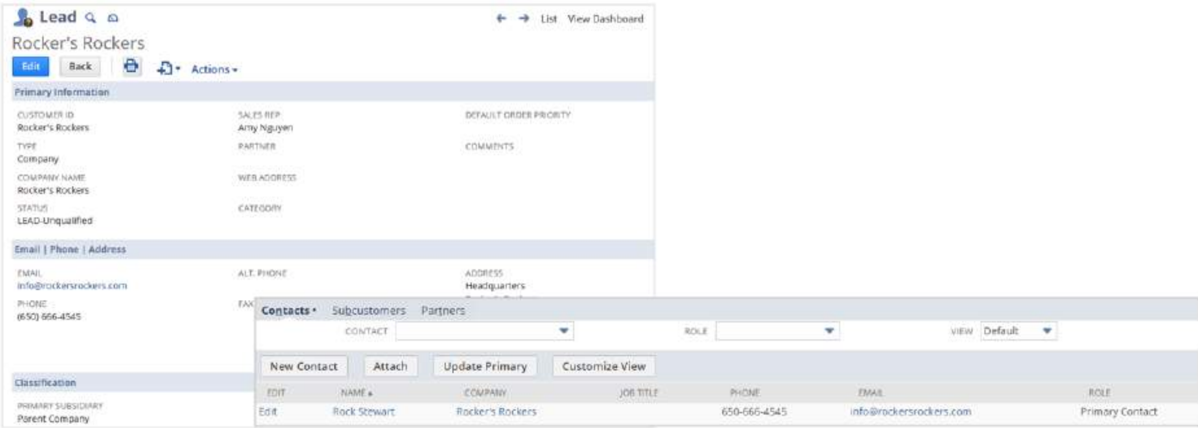
Enter a Lead

Qualify a Lead

Use Case: Sale Force Automation has been set up. You start investigating the use of the lead record and how it transforms in NetSuite.

View a Lead Record

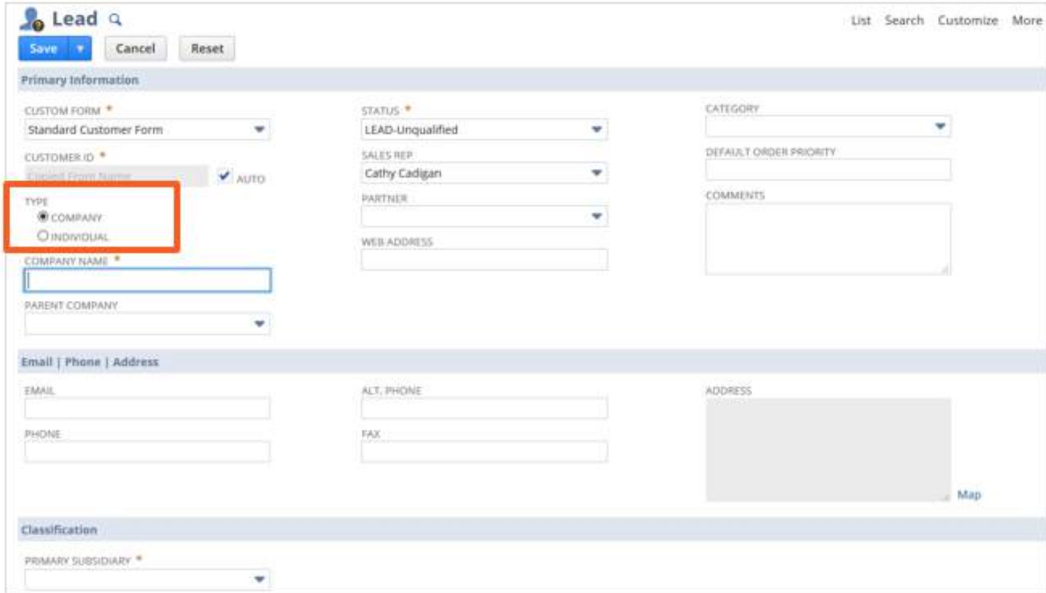
Drill into the lead record from the lists of leads:



- Go to **Lists > Relationships > Leads** and **View** a lead record
- Review the record noting the:
    - Sales rep assignment
    - Contact information
    - Other relevant information.

Enter a New Lead

Navigate to **Lists > Relationships > Leads > New** to access the New Lead form; enter a lead directly into the system:



- Enter in the **Primary Information** and **Classification** section fields:
  - Note that the Type defaults to the setting from **Setup > Company > General Preferences > Default Lead Type:**
    - The user can change it manually, for example change it from **Company** to **Individual**
    - **Type Individual** tracks the customer record by the person's name

Qualify a Lead

A Lead's status can be manually changed:

- **Edit** a Lead record
- In the **Primary Information** section > **Status** field, use the dropdown to set the new status:
  - Status changes should be determined by your sales qualification process

Lead Conversion Overview

Commonly used in business-to-business; companies with more than one contact:

- Facilitates better management of the lead process, in the case when the lead is Type Individual with future requirements for additional contacts
- Lead record is converted into two records:
  - A prospect record tracking information on the company who eventually becomes a customer
  - A contact record tracking information on the individual

Use Case: Your Sales Rep is working with Joe Smith as an individual, who owns Smith Securities. Initially, your sales rep does not anticipate needing other contacts. However, that scenario changes when the sales rep discovers how big Smith Securities is. How can this be accommodated?

- New Lead, **Type Individual**, **Customer Name = Joe Smith**, Company Name = Smith Securities
- Enable **Lead Conversion**
- Lead transform to **Type Company**, **Customer Name = Smith Securities**, Primary Contact = Joe Smith:
  - Now you can add additional contacts

Walkthrough: Lead Conversion

Enable Lead Conversion Feature

Revisit Sales Preferences

View the Lead, Save and Convert

Additional Conversion Tasks

Use Case: The Company may be working with both individuals and companies that represent potential customers. Being able to convert a potential customer, initially represented as an individual, and converting them to a company with a contact will be important.

NETSUITE | SuiteTraining

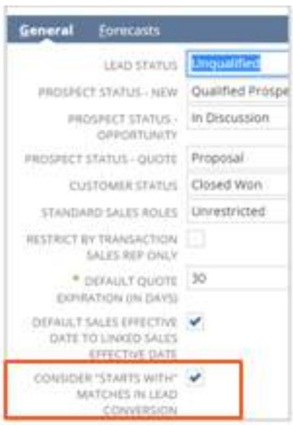
Enable Lead Conversion

The Lead Conversion feature may be enabled to allow converting from an Individual type of customer record, to Company type:

- Go to **Setup > Company > Enable Features > CRM** subtab > **Sales** section
- This feature allows the conversion of leads into prospects, customers, with contacts, opportunities and tasks.

Revisit Sales Preferences

A new preference is available, with the Lead Conversion feature enabled:



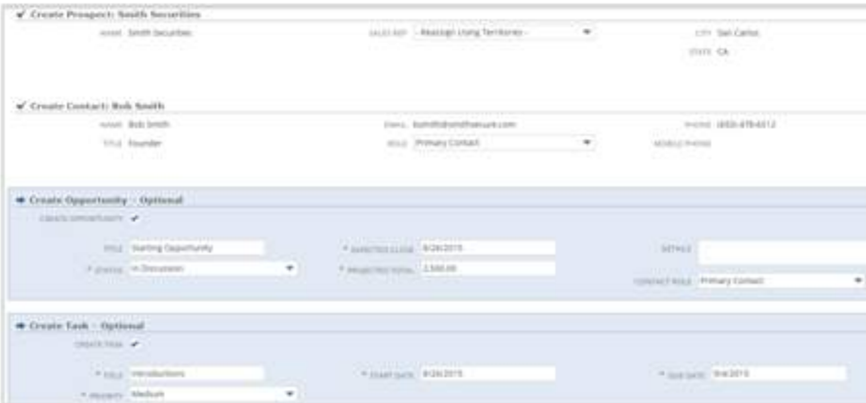
- Go to **Setup > Sales > Sales Preferences**
- **Consider "Starts With" Matched in Lead Conversion**
    - If checked, then NetSuite checks contacts and lead, prospect, or customer records to be considered possible duplicates upon lead conversion

NETSUITE | SuiteTraining

View, Save and Convert the Lead

Go to **Lists > Relationships > Leads** and **View** the lead record:

- Click the **Convert** button to view the **Convert Lead** page:
  - Review **Primary Information, Email | Phone | Address** and **Classification**
  - Go to **Create Prospect** and assign a **Sales Rep**
  - Go to **Create Contact,** confirm the name and select the **Role,** e.g. Primary Contact
  - Continue to **Create Opportunity – Optional**
    - Check **Create Opportunity** and complete required fields
  - Continue to **Create Task – Optional:**
    - Check **Create Task** and complete required fields



  - Click **Submit**
  - The lead record is converted into two records:

    - A prospect record, type company
    - A contact record tracking information on the individual

Walkthrough: Opportunity to Quote Process

- Create an Opportunity
- Manage the Opportunity
- Generate a Quote

Use Case: Let's now look at working with transactions that may be part of the sales process.

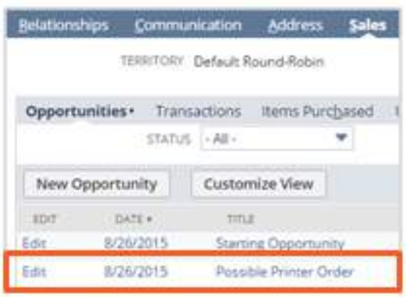
Create an Opportunity

This is an internal document; the customer does not see it. Creating an opportunity from the lead record will populate all the pertinent information:

- In a customer (lead, prospect or customer) record, View or Edit mode
- Go to the **Sales** subtab and click on the **New Opportunity** button

- Review information populated from the Lead record, add and update if necessary:
    - Go to the **Items** subtab, **Items** sublist to add items
    - Review other subtabs, adding information as necessary
- Click **Save,** the Opportunity status is **In Progress**

- This opportunity is now part of the entity's record, Sales subtab



Manage the Opportunity

The Opportunity Status may be manually changed to reflect how likely you are to continue through the sales process:

- **Edit** the opportunity
- In **Primary Information** go to the **Status** field and select from the dropdown list:
  - These statuses have been defined under **Setup > Sales > Customer Statuses**
  - Each status is related to a stage of the customer record, e.g. lead | prospect | customer
  - Describes the progression through the sales cycle

Generate a Quote

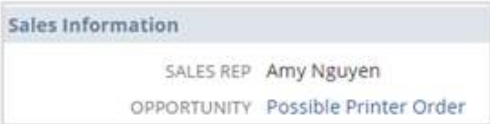
Use the Opportunity as the basis for the quote:

- Populate the quote from the opportunity and edit if necessary
- **View** the opportunity
- Go to the **Sales** subtab, click **Quotes** sublist and click **New Quote:**

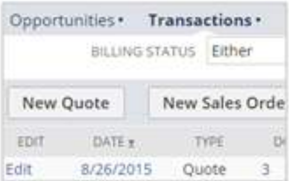
  - Review the populated information; add and update if necessary

  - Add, remove, edit items
  - Review other subtabs, adding information as necessary

- Click **Save,** the **Quote** is saved with a status of **Open:**
  - We have a link back to the Opportunity, which now has a status of **Issued Quote**



- This opportunity is now part of the entity's record, **Sales** subtab, **Transactions** sublist



Walkthrough: Quote-to-Sales Order Process

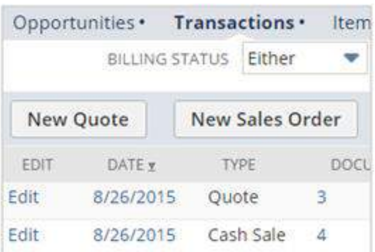
Review the Quote and Convert to a Sales Order

Use Case: Once negotiations have been finalized, move on to the customer's commitment to purchase.

Review the Quote and Convert to a Sales Order

Use the Quote as the basis for an order:

- Populate the order from the quote and edit if necessary
- **View** the Quote
- Review the information:
  - If necessary **Edit** the quote, to add and update, then **Save**
- Click the **Sales Order, Cash Sale,** or **Invoice** button:
  - The corresponding sales transaction opens and may be edited.
  - **Save** the transaction
  - We have a link back to the following:
    - The **Customer** with a status of **Closed – Won**
    - The **Quote** with a status of **Processed**
- This Sales Transaction is now part of the entity's record, **Sales** subtab, **Transactions** sublist



Best Practices and Considerations

Lead-to-Customer:

- Track contacts, activities (including tasks, events, and phone calls), and messages on the Lead record
- Mark leads as qualified when they show interest in purchasing your company's goods or services
- Identify leads as Dead-Leads when they do not have any interest in purchasing your company's goods or services

***OneWorld* Considerations - Do you share customers globally?**

- Review the Multi Subsidiary Customer feature
- Customers are separate entities and separate accounts
- To see a global view across subsidiaries, create parent/child relationships between customer records

Standard Pipeline and Forecast Reports

Pipeline reports help monitor the health of your sales pipeline:

- Identify the projected and weighted totals of open opportunities and estimates for each sales rep, with expected close dates, and totaled by customer
- Open Deals > X% that you want to track
- Reports > Pipeline Analysis

Forecast reports gauge how well the sales reps are doing:

- Identify each sales rep's forecast and quota for a defined period, view each sales rep's calculated and override forecasts for a defined period, and Determine how close each sales team's saved forecast is to actual amount of sales for a period
- Forecast = Open Deals + Closed Deals - Forecast = (Opportunities + Proposals) + (Sales Orders + Invoices)
- **Reports > Forecast**

Now It's Your Turn

01: Work a Lead

02: Generate a Quote from an Opportunity

03: Generate a Sale Order from a Quote

Use Case: Check the customer status and answer these questions:

- Locate your lead and work with your lead
- Allow 10-15 minutes

Exercise 01: Work a Lead

Time: 3-5 minutes

Scenario: Sales reps need to effectively work their leads. We look at editing lead records, as well as converting leads.

In this exercise:

- Edit the lead you created through the online lead form and change the lead status and add an opportunity.
- Enable Lead Conversion and enter a new lead

Locate the Lead (without Lead Conversion enabled)

1 **Navigate to Lists > Relationships > Leads,** the Leads list page displays.

   a. Locate the New York Lead that you just entered. (Create and Online Form Exercise)

   b. Verify that it was assigned to the correct sales rep based on the rules and territories that set up in the previous module.

Change the Lead Status

2 Click **Edit** to update the lead record.

   a. In the **Status** field, change the status to LEAD-Qualified Lead.

   b. In the **Sales Rep** field, verify that a Sale Rep has been chosen.

   c. Click the **Address** subtab, scroll down the page to verify that you have the correct address information (State of New York).

   d. Click the **Company Profile** subtab and select an Industry.

   e. Click **Save**.

Add an Opportunity

3 If you are no longer on the lead, find the record under Recent Records, click the record name, and then click the **Sales** subtab

4 From the **Sales** subtab, go to the **Opportunities** sublist and click **New Opportunity**.

5 The Opportunity page opens.

   a. In the Title field, enter TEST Opportunity.

   b. Select a Warehouse in the U.S.

6 From the **Items** subtab, click the **Add Multiple** button and add the following items:

a. (Quantity) 1 HP LJ 1320 Printer

b. (Quantity) 1 Service for the HP LJ 1320

c. Click **Done** and then click **Save** to save your changes.

d. Notice the Opportunity has a status of IN PROGRESS

Create a Lead (with lead conversion enabled)

7 **Setup > Company > Enable Features > CRM** subtab

a. Under the **Sales** section, check **Lead Conversion**.

b. Click **Save.**

8 Navigate to **Lists > Relationships > Leads > New**, the Leads entry form displays.

9 Use the **Standard Customer Form** and enter the following information:

a. Type: Select **Individual**

b. First Name: **Betty**

c. Last Name: S**myth**

d. Company Name: **TEST DEF**

e. Primary Subsidiary: **Parent Company**

10 Click the **Company Profile** subtab and select an Industry.

11 Click **Save**.

Change the Lead Status and Convert the Lead to a Prospect

12 Click **Edit** to update the lead record.

a. In the **Status field**, change the status to LEAD-Qualified Lead.

b. Click **Save & Convert**.

i. Note: If prompted select the radio button to Create Prospect TEST DEF.

13 In Create **Prospect: TEST DEF** choose Amy Nguyen from the Sales Rep dropdown list.

14 In **Create Contact: Betty Smyth** choose Primary Contact from the Role dropdown.

15 Under **Create Opportunity – Optional,** check Create Opportunity.

a. Enter Test Lead Conversion in the **Title** field.

b. Enter 1000 in Projected **total** field.

16 Under **Create Task – Optional**, check Create Task.

a. Enter **Title**: Call Betty/TEST DEF initial call.

b. **Start Date** is today, **Due date is** one week from today.

c. Change **Priority** to High.

17 Click **Submit** and **view the Prospect** record.

a. TEST DEF is now the customer of Type Company and Betty is the contact.

18 **End.**

Exercise 02: Generate a Quote from an Opportunity

Time: 1-2 minutes

Scenario: In this exercise:

- Convert the opportunity to a quote; populating the information from the opportunity into the quote.

1 Navigate to **Transactions > Sales > Create Opportunities > List**.

   a. Click **View** for the TEST Lead Conversion.

2 The opportunity displays and the Status should be In Discussion.

   a. Under the **Sales** subtab, go to the **Quotes** sublist and click **New Quote** to verify that the status is Proposal with a probability of 50%.

3 A **Quote** form displays:

   a. In the **Classification** section, enter a **Warehouse**

   b. Go to the **Items** sublist, select HP LJ 1320 Printer from the item dropdown list.

   c. Enter **Qty** 10 of HP LJ 1320 Printer.

   d. Click **Add.**

   e. Click **Save**.

   f. The quote is saved and is an open status.

4 End.

Exercise 03: Generate a Sales Order from a Quote

Time: 1-2 minutes

Scenario: In this exercise:

- Convert the estimate/quote into a sales order; populating the information from the quote into the sales order.

1. Navigate to **Transactions > Sales > Prepare Quotes > List**.
2. **Locate the Quote** you just created and click the **View** link next to it.
    a. Click the **Sales Order** button.
    b. Change the Custom Form to **Standard Sales Order**, if necessary.
        i. Note that in the Sales Information section the Create From references our Quote. Review all the information, including the line item.
    c. Click **Save.**
3. **Navigate to Lists > Relationships > Prospects**.
    a. Is the Prospect in this list?
    b. Answer:
4. **Navigate to Lists > Relationships > Customer**.
    a. Is our Prospect in this list?
    b. Answer:
    c. Why? What caused it to convert to a customer?
    d. Answer:
5. **End.**

Solution for Exercise 03: Generate a Sales Order from a Quote

Navigate to Lists > Relationships > Prospects.

Is the Prospect in this list?

Answer: No.

Navigate to Lists > Relationships > Customer.

Is our Prospect in this list?

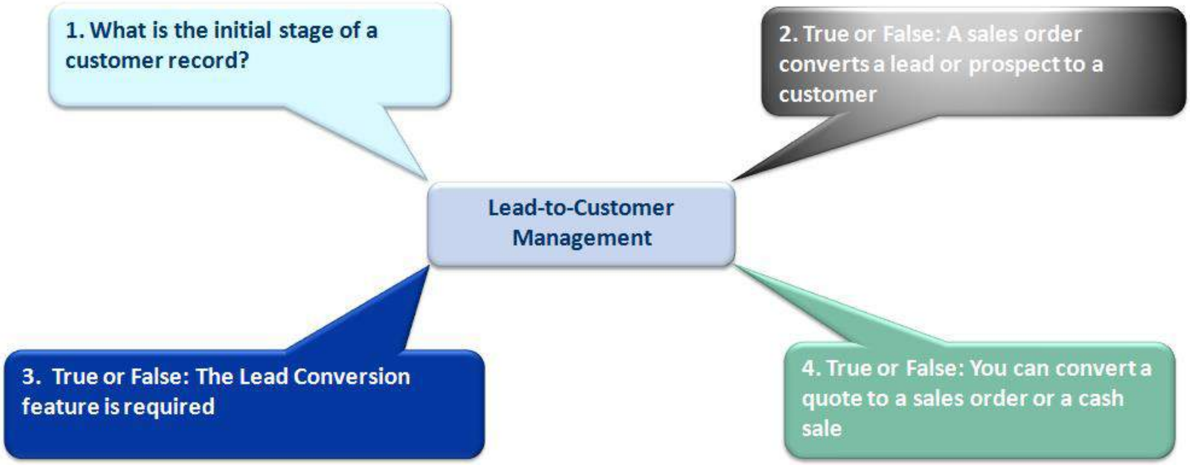
Answer: Yes

Why? What caused it to convert to a customer?

Answer: Creation of a Sales Order.

Activity: Lead-to-Customer Management

After completing the exercises, answer these questions



Need More Information

NetSuite Help Center:

- Sales Concepts and Setup Guide: User Guide

SuiteAnswers Learning Center:

- New Feature Training
- Sales Force Automation
- Implementing Sales Forecasting in NetSuite

View the following video, from the NetSuite Essentials tab in the demo account:

- Lead to Customer Management

NETSUITE | SuiteTraining

Customer Support and Case Management

About this Module

Providing excellent customer service and increasing customer satisfaction is critical to the success of your business. You may be wondering:

- How do we create and manage cases?
- As with lead assignment, can we have automated case assignment?
- Are there other considerations?

Objectives

1. Define customer support features and terminology
2. Identify implementation considerations and questions; then set up customer service and support features
3. Establish Case Rules and Territories
4. Establish Case Escalation Rules
5. Enable customers to submit support cases online
6. Describe the Case-to-Close business process and perform tasks associated with working a Case
7. Use reports to analyze Case metrics
8. Introduce current support enhancements

Customer Service and Support Overview

Overview:
Handle issues quickly and improve customer relationships:

- Set up required values for rules and territories, support preferences, and define support reps and support groups
- **Case** values include: **Origin, Type, Status**, and **Priority**
- Define **Rules** and **Territories** that facilitate case **Automated Assignment**
  - Alternatively, work with manual case assignment
- Consider **Escalation** routing to get support help from another rep or support group
- **Work** and **Close** cases

Implementation Considerations

Customer support overview and support channels:

- How do you currently track and resolve support cases?
- Do you need to create an online Case form?
- How do your customers communicate support issues to you and how do you communicate with customers when you update a case?
- Do you need a support email alias, such as support@companyx.com

Support teams:

- Do you assign to teams or individuals & can they view each other's cases?

OneWorld:

- How do you handle support procedures across subsidiaries?
- Are there differences depending upon the subsidiary, such as: using logos or the wordings and policies among the different subsidiaries?

Additional Options: *OneWorld*

Options are available for managing customer support in *OneWorld:*

- Enter main support “From” email addresses for each subsidiary
- Maintain notification templates for each subsidiary
- Use different inbound email addresses for each subsidiary with the Email Case Capture feature
- Configure and brand online case forms
- Track cases by subsidiary
- Restrict support rep visibility to cases based on subsidiary

Activity: Your Support and Service Considerations

Which areas will you be using? Comment and concerns?

Area	Comments
Support forms	
Case routing	
Help desk	
OneWorld	
Other	

Walkthrough: Initial Setup

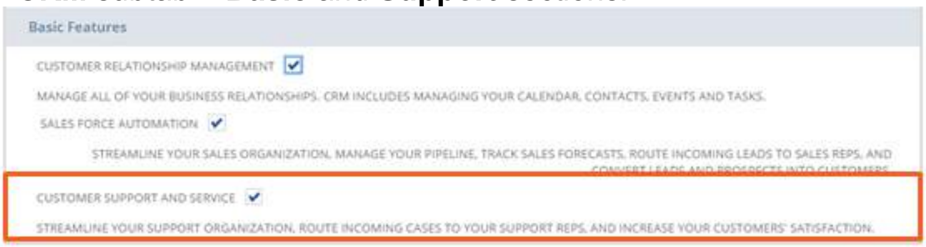
- Enable CRM (Basic & Support) and Employee Features
- Define Support Reps
- Set Up Support Groups

Use Case: This Company has decided to use NetSuite for customer support and services. Time to start configuring and doing initial set up tasks.

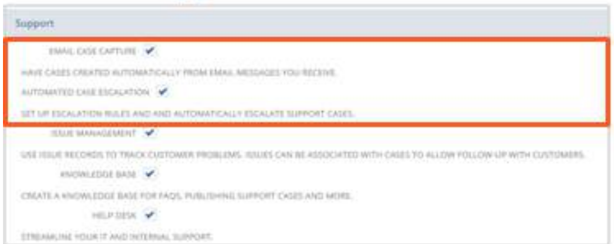
Enable Features

Navigate to **Setup > Company > Enable Features** to define the CRM and Employee features to facilitate support:

- **> CRM** subtab **> Basic** and **Support** sections:

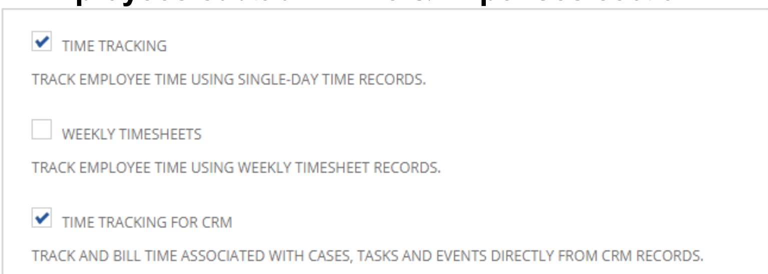


  - Customer Support and Service: route cases



  - Email Case Capture: case creation from received emails
  - Automated Case Escalation: work with escalation rules, for automatic escalation of cases
  - Consider Issue Management and Help Desk – see the Help Topics

- **> Employees** subtab **> Time & Expenses** section:



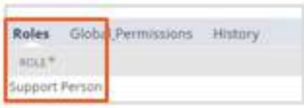
  - **Time Tracking** to track employee time using singe day time records.
  - **Time Tracking for CRM**: track and bill time associated with cases, tasks, and events directly from these records

Define Support Reps

Employees must be selected as Support Reps to assign them in case records:

- Navigate to **Lists > Employees > Employees** and **Edit** the employee record
- Go to the **Human Resources** subtab

  - Select the **Support Rep** check box
- Go to the **Access** subtab, **Roles** sublist
  - Assign a **Support** role



- **Save**
- Displays in the Support Rep or Assigned To fields on Case records, support Territories and Escalation assignments

- Are included on customer support reports and report snapshots

Set Up Support Groups

You may also use support groups to facilitate the resolution of cases:

- Go to **Lists > Relationships > Groups > New**

- Select the kind of group to create, e.g. **Static**
- Select the Members, e.g. **Employee**

- Click **Continue**

  - Enter **the Name, Owner**, and other general information as necessary
  - Check the **Support Group** box to make this group available for assignment on a support case
  - Add in the **Group Members** on the **Members** subtab
- **Save** the group; this group can now be assigned to cases and the group calendar is available on activities

Walkthrough: Set Up Support Values

- Create Case Statuses
- Set Up Case Priorities
- Define Case Types
- Identify Case Origin Types

Use Case: Similar to sales force automation, the administrator can set up values that help tracking and can be used with case rules.

Create Case Statuses

Navigate to **Setup > Support > Cases Statuses > New;** case status indicates phase of Case resolution:

- Enter a name for the **Case Status**
- Define its location in a dropdown list with **Insert Before**

- Select the appropriate **Stage**
- A case status can be indicated as "**On Hold**" to stop the clock
    - A key support metric is turnaround time; there are situations where you do need to stop the clock.
        - For example, waiting on a customer to take some sort of action and report back to you.
- Enter an optional Description
- Check **"Show Awaiting Support Reply"** to track cases needing a reply; display in reports and saved searches
- **Save**

Case Priorities, Types and Origins

Go to **Setup > Support > Case Priorities > New**; priorities determine order of resolution

- Enter a name for the **Case Priority**, select **Insert Before**, enter optional Description

Go to **Setup > Support > Case Types > New**; case types identify what the customer might be reporting to you:

- Enter a name for the **Case Type**, select **Insert Before**, enter optional Description

Go to **Setup > Support > Case Origins Types > New**; case origin type indicates how the case came to you

- Enter a name for the **Case Origin**, select **Insert Before,** enter optional Description

Walkthrough: Rules and Territories

Use Case: To facilitate automated case assignment and automated case escalation, define rules, assign to territories.

Create Case Rules

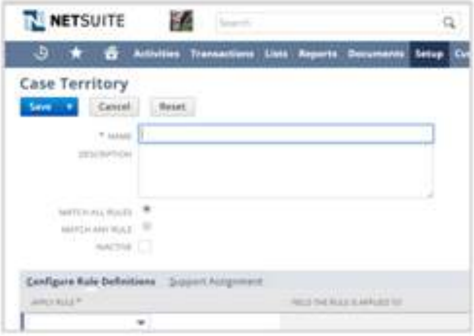
Create Case Rules before creating Case Territories; rules can be grouped on territories:

Use Case: Case rule to be defined by the priority

- Go to **Setup >Support > Case Rules > New** to use standard and custom Case and Customer fields; e.g. Case field - Priority
- Enter a **Name** and provide an optional description
- Specify the **Criteria**, e.g. **any of**
- Select values for **Priority**, e.g. **Urgent Red** and **High**
- **Save**

Define Case Territories

- Automatically assign cases to support reps or support groups:
- Configure Rule Definitions and Support Assignments
- Go to **Setup > Support > Case Territories > New**



  - Enter a **Name** and an optional Description
  - Select either **Match All Rules** or **Match Any Rule**
  - **Configure Rule Definitions** subtab, and add a value for **Apply Rule**
  - **Support Assignment** subtab, add **Support Reps / Support Groups**
  - **Save**
- Default Round-Robin Territory:
  - Automatically distributes Leads evenly among sales reps

Manage Case Territories

Review the support territory stacking to further optimize customer support and service functionality:

- Go to **Setup >Support > Case Territories** and view the **Manage Case Territories** page

- Adjust order of territories, **Move to Top** or **Move to Bottom** or drag and drop, to adjust assignment
  - Default Round–Robin should probably remain last
  - Click on **Default Round-Robin** to **Edit** and add Support Reps
    - Cases not matching case rules are unassigned; they can be assigned manually or distributed by the Round Robin sales territory.
    - Automatically distributes cases evenly among support reps

Create Case Escalation Rules

To use the following functionality, the **Automated Case Escalation** feature must be enabled at **Setup > Company > Enable Features > CRM** subtab > **Support** section.

Escalation Rules can be applied to cases and then assigned to an escalation territory:

Use Case: Escalate cases coming in during non-work hours, weekend. Capture any case that has been in the queue for 8 hours or 480 minutes.

- Go to **Setup > Support > Escalation Rules > New;** use case and customer records, standard and custom fields, e.g. Duration since Case Creation (minutes)
  - Enter the **Name,** optional Description
  - Select **Criteria,** e.g. greater than or equal to
  - Enter **Duration Since Case Creation (Minutes)** as **480**
  - **Save**

Manage Escalation Assignments

Automatically escalate cases to support reps or support groups:

- Configure Rule Definitions and Support Assignments
- Go to **Setup > Support > Manage Escalation Assignments > New**

  - Enter a **Name** and an optional Description
  - **Configure Rule Definitions** subtab, and add a value for **Apply Rule –** e.g. Off Hours Cases, Duration since Case Creation (minutes)
  - **Escalation Assignment** subtab, add **Support Reps**
  - **Save**

Walkthrough: Online Form and Preferences

Create and Publish an Online Case Form

Set Support Preferences

Use Case: Give your customers the option to enter their own support needs, using a form. Consider the support preferences and set up accordingly.

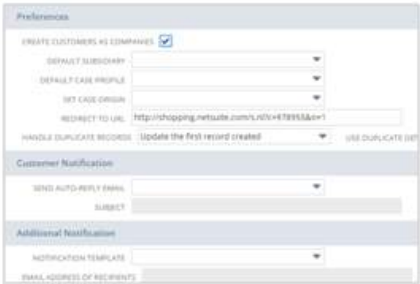
Create and Publish an Online Case Form

Go to **Setup > Support > Online Case Forms > New** to create a form that captures new case information and creates case records:

- **Select Type: Default Form Template**
- **Title:** Displays at the top of the form and the Web tab
- **Message**: Introduction to the form, use rich text editing
- **Enable Online:** Makes form accessible online
- **Select Fields** to add fields needed for your requirements:
    - Also, define the behavior for each field

Setup Workflow

On the **Setup Workflow Subtab,** set the following per your needs:



- **Preferences**, for example**:**
    - Consider the **Create Customers as Companies** setting
    - **Default Subsidiary**
    - **Default Case Profile:** determines from name and email address, and templates for notifications
    - **Set Case Origin**
    - **Redirect to URL**
    - Define **Handle Duplicate Records** and **User Duplicate Detection Criteria**
- **Customer Notification:**
    - **Send Auto-Reply Email:** select a template to use when generating an automatic reply to the customer
- **Additional Notification:**
    - **Notification Template** and **Email Address of Recipients**

Publish Form URL

View a saved online form at **Setup > Support > Online Case Forms:**

- Go to the **External** subtab to view/access the following information
    - **Number of Requests:** number of times the form was accessed
    - **Number of Submits:** number of times the form was submitted
    - **Internal Form URL:** use this to URL to publish the form on a tab inside your NetSuite account; requires user access to your NetSuite account
    - **Publishable Form URL**
        - Use this URL to access the form outside of NetSuite application
        - The **Enable Online** check box must be checked
        - As the administrator, you will use this URL to test the form

Set Support Preferences

Go to **Setup > Support > Support Preferences** and set default support preferences workflow, notifications, and ordering on various subtabs:

- **General: Case Email Setup, Preferences, Defaults, Case Lockout**
    - Under **Case Email Setup**, check **Default Case form to Internal Only** as a best practice. You may need to uncheck Default Case form to Customer, **Save** your changes, and then go back in to select **Default Case form to Internal Only**
- **Notification:** Creation, Inbound Email Case Capture, Assignment, Update, Escalation, Closure
- **External:** External Case Form Redirect URL, Default Customer Case Form, Create New Lead on No Match
- **Inbound Email:** Inbound Email
- **Ordering:** Case Statuses, Case Priorities, Case Types, Case Origins, Case Issues

Please refer to **Help and SuiteAnswers** for detailed information on all the above

Introduction: Support Case Profiles

Introduce Support Case Profiles

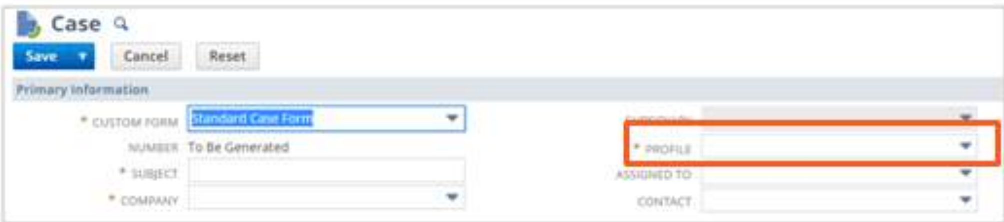
Use Case: Further tailor your usage of support cases

Support Case Profiles

Create case profiles that enable you to apply different configurations to sets of support cases:

- Provides better control over the branding of your support communication
- Case profiles include the following settings:
- Support From name and email address
- Anonymous customers for inbound email and online forms
- Customer and employee case notification templates
- To create new case profiles, go to **Setup > Support > Case Management > Case Profiles > New**

  - Case Profile is a required field on the case form



  - OneWorld accounts can set up case profiles by subsidiary

Please refer to **Help and SuiteAnswers** for detailed information

Now It's Your Turn

01: Enable Customer Service and Support Features
02: Set Up an Employee as a Support Representative
03: Create a Case Status
04: Create a Case Priority
05: Create a Case Type
06: Create a Case Rule
07: Create a Case Territory

Use Case: Investigate the customer service and support set up tasks.

- Allow 20 – 30 minutes

Exercise 01: Enable Customer Service and Support Features

Time: 1-2 minutes

Scenario: Chatham company has decided to work with Customer Support and Service in NetSuite.

In this exercise:

- Enable Customer Service and Support

1. **Navigate to: Setup > Company > Enable Features** and click the **CRM** subtab.
    a. In the **Basic Features** section, the following should be checked:
        i. Customer Relationship Management
        ii. Customer Support and Service
    b. In the **Support** section the following should be checked:
        i. Email Case Capture
        ii. Automated Case Escalation
        iii. Deselect Issue Management if checked.
    c. Click **Save**.
2. **End.**

Exercise 02: Set Up an Employee as a Support Representative

Time: 1-2 minutes

Scenario: In this exercise:

- Setup a current employee as a Support Representative

1. Navigate to **Lists > Employees > Employees**.
2. Locate **Amy Nguyen** and click the Edit link next to the left of record name.
    a. Verify that you are on the Standard Employee Form.
    b. In the Email | Phone | Address section, enter the Email address: anguyen@chatham.com
    c. Click the **Access** subtab
        i. Select the **Access** checkbox.
        ii. Assign the **Support Person role** and click Add.
        iii. Do NOT click any other boxes.
    d. Click the **Human Resources** subtab and ensure that the **Support Rep** box is checked.
    e. Click **Save.**
3. End.

Exercise 03: Create a Case Status

Time: 1-2 minutes

Scenario: Case Statuses indicate where the case is in the resolution process.

- Create new case status to indicate that the Support Representative has responded to a customer and is now waiting for a response from that customer

1 **Navigate to Setup > Support > Case Statuses > New.**

   a. In the **Case Status** field, enter Waiting for Customer Reply.

   b. In the **Insert Before** field, select 3-Escalated.

   c. In the **Stage** field, ensure that Open is selected.

   d. Check the **On Hold** checkbox to “stop the clock” on the case, avoiding excessive resolution time being shown for the case on reports.

   e. Check **Show Awaiting Support Reply** to have this case status show on searches and reports that track cases needing a response from support reps

   f. In the **Description** field, enter: Use this status when waiting for a response from the customer.

   g. Click **Save.**

2 **End.**

Exercise 04: Create a Case Priority

Time: 1-2 minutes

Scenario: Case priorities help prioritized which cases should be worked on first. Users will then be able to more easily identify cases needing immediate attention.

In this exercise:

- Create a new case priority called, Urgent – Red

1 Navigate to **Setup > Support > Case Priorities > New** and enter the following details:

   a. **Case Priority**: Urgent-Red

   b. **Insert Before**: 1-High

   c. **Description:** Use this case priority to identify cases that have been submitted from large customers that have expressed an urgent need for a resolution.

   d. Click **Save.**

2 **End.**

Exercise 05: Create a Case Type

Time: 1-2 minutes

Scenario: Case type helps define what is being reported by the customer and help support reps track the different types.

In this exercise:

- Create a new case type called, Critical Error.

1 Navigate to **Setup > Support > Case Types > New** and enter the following information:

   a. **Case Type**: Critical Error

   b. **Insert Before**: 3-Problem

   c. **Description**: Use this case type when customers report receiving a critical error message.

   d. Click **Save.**

2 **End.**

Exercise 06: Create a Case Rule

Time: 1-2 minutes

Scenario: Case rules are part of automating case assignment. Rules are part of a case territory. Rules may be based on standard and custom fields.

In this exercise:

- Create a case rule to track support cases

1 Navigate to **Setup > Support > Case Rules > New.**

   a. Click the **Priority** link.

   b. Enter or select the following information:

      i. **Name**: Red

      ii. **Criteria:** any of

      iii. **Priority:** Urgent-Red and High

   c. Click **Save.**

2 **End.**

Exercise 07: Create a Case Territory

Time: 3-5 minutes

Scenario: Case territories are defined by rules. If the rule evaluates to true, then the case is automatically assigned to a representative on the territory.

In this exercise:

- Create a case territory and assign the previously created rule
- Assign a support Rep

1 Navigate to **Setup > Support > Case Territories > New** and enter the following information:

   a. **Name**: Urgent Red Responders

   b. Ensure that the **Match all rules** is selected.

2 Go to the **Configure Rule Definitions** subtab:

   a. From the **Apply Rule** dropdown, select Case Rule –Red.

   b. Click the **Add** button.

3 Click the **Support Assignment** subtab.

   a. From the **Support Rep** dropdown, select Amy Nguyen.

   b. Click the **Add** button.

4 Click **Save**.

Test the New Case Territory

5 Navigate to **List > Support > Cases > New** and enter the following information:

   a. **Subject**: Web Server Down

   b. **Company:** TEST ABC

   c. **Profile:** Parent Company

   d. **Contact**: Amy Andrews

   e. **Priority**: Urgent –Red

   f. **Type**: Critical Error

      i. Notice that Type, Status, and Priority values that created are available in the dropdown lists for each of those fields.

      ii. Notice that the Assign to field is blank.

6 Click **Save.**

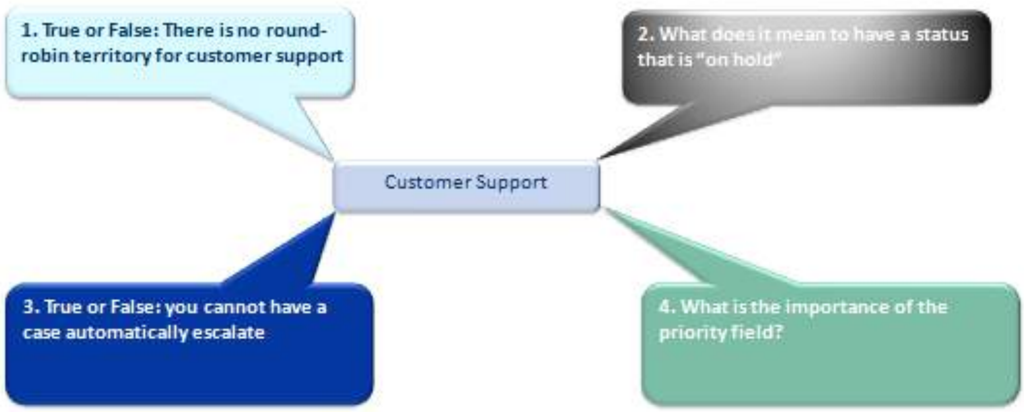
   a. Notice that the Assign to field is now set to Amy Nguyen.

      i. The case was automatically assigned based on the case rule and case territory you created.

7 End.

Activity: Set Up Customer Support

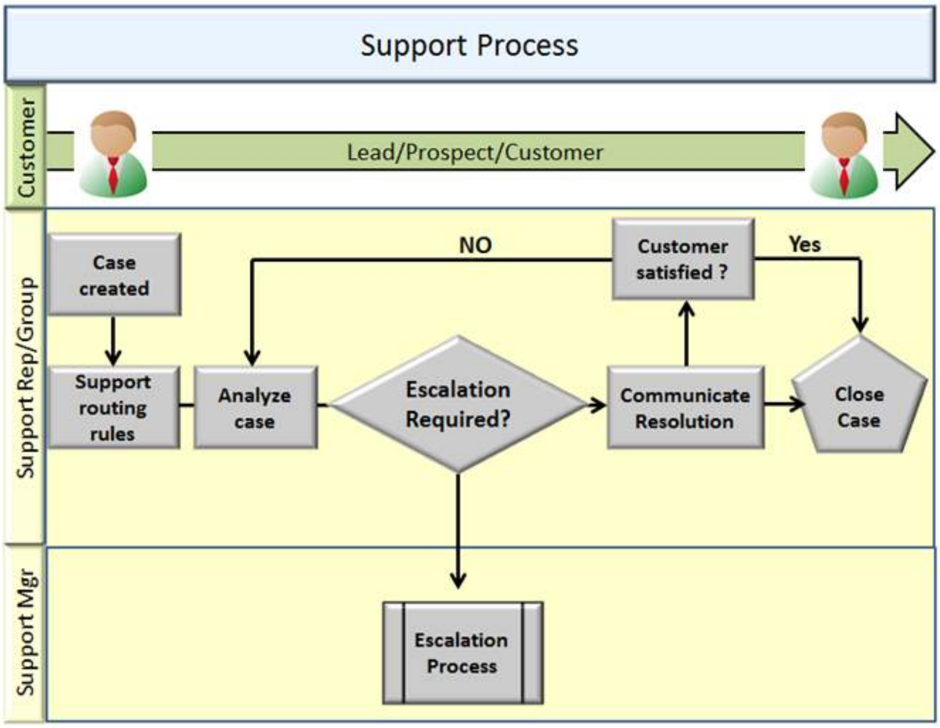
Answer these questions



NETSUITE | SuiteTraining

Case-to-Close Business Process

Customer enters a problem as a Case. Support rep works to resolve the Case. The Case closes when problem or issue is resolved.



The diagram the workflow of the support group/manager and the standard business process that a support representative or support person should follow to complete the tasks of:

- Creating a Case
- Viewing the Case list
- Assigning a Case using automatic assignment and manual assignment
- Grabbing a Case
- Responding to a Case
- Escalating a Case
- Closing a Case

Walkthrough: Working a Case

Use Case: Examine case entry and end-user tasks associated with working a case.

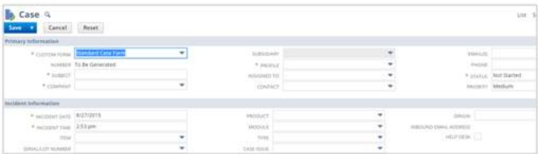
Case Entry Overview

Cases can be entered in four (4) ways:

- Support rep creates Case record in NetSuite for customer who calls in
- Customer completes an online Case form
- Customer sends an email to your support address
- Customer clicks Contact Support link in the Customer Center of your web site and submits an external Case record

Manual Case Entry

Go to **Lists > Support > Cases > New** to manually enter a case into NetSuite:

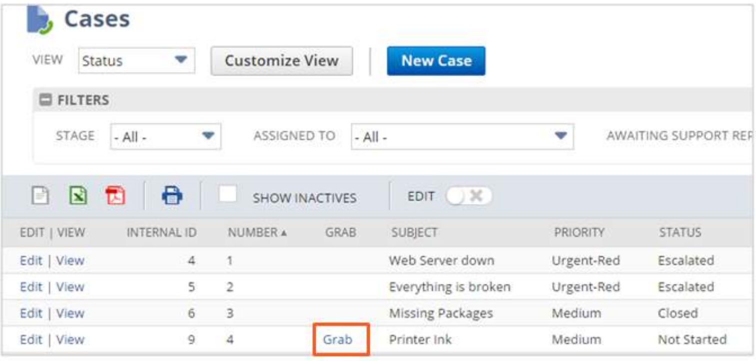


- Complete the **Primary Information** and **Incident Information** section fields
- Go to the Communication subtab to enter Incoming from Customer Message: the details of their problem
    - You can also enter an outgoing message to be sent in response to the case.
    - Go to the File sublist to add Attachments

   - For better customer service, NetSuite provides the ability to attach files such as screenshots, logs, and recordings to the case; ensuring that your support team has access to the information they need to understand and diagnose issues
- **Save** the case
- NetSuite generates Case number when record is saved
   - Can use Case number to search

View the Case List

Monitor cases awaiting assignment and status of assigned cases:



- Go to **Lists > Support > Cases**
- Select the appropriate **View**
   - Use filters to get the view that best fits your needs
      - The Cases list displays all open Cases by default and can be filtered to show only the Cases you want to work with
- Use filters to refine the list display
- Click **Grab** to take the case and assign it to yourself

Assign a Case Automatically or Manually:

Cases may be assigned, automatically, using rules and territories:

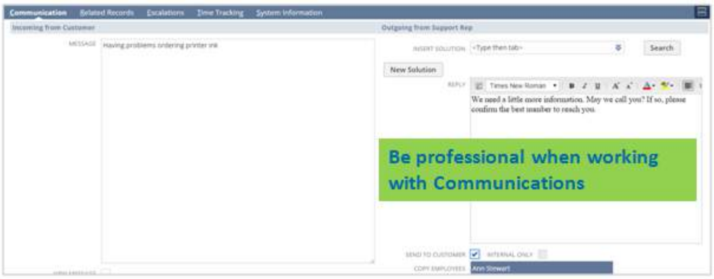
- **Use Case Rules and Territories**: A Case assignment rule is a set of parameters for how support Cases are distributed to support representatives:
   - Rules are based on fields found in the Case record
   - Rules are grouped together as Case Territories
   - Territories are assigned to your support representatives so that new support Cases are distributed automatically
- If you have assigned support reps to the round-robin territory, then the cases will be distributed round-robin style

The Support Manager or designated employee can assign Cases manually:

- In either a new or existing case record he **Assigned To** dropdown lists displays employee, marked as support reps, or a support group

Respond to a Case

Edit the **Case** record, go to the **Communication** subtab:



- Left-hand side is the customer's message, either entered by a support rep or populated from a form
- Go to the right-hand side **Outgoing from Support Rep;** enter a message to the customer, e.g. maybe a request for more details
    - **Send to Customer** is checked
    - **Copy Employee** if required
- **Save** the case: An email is sent to the customer and is captured as part of the communication history on the case record

Escalate a Case

Escalate Case to another support rep or other employee:

- The escalation message is NOT visible to the customer
- Edit the **Case** record, go to the **Escalations** subtab

    - Enter in an **Escalation Message**
    - Go to the **Escalate To** sublist and add the **Escalatee (s)**
- **Save** the case

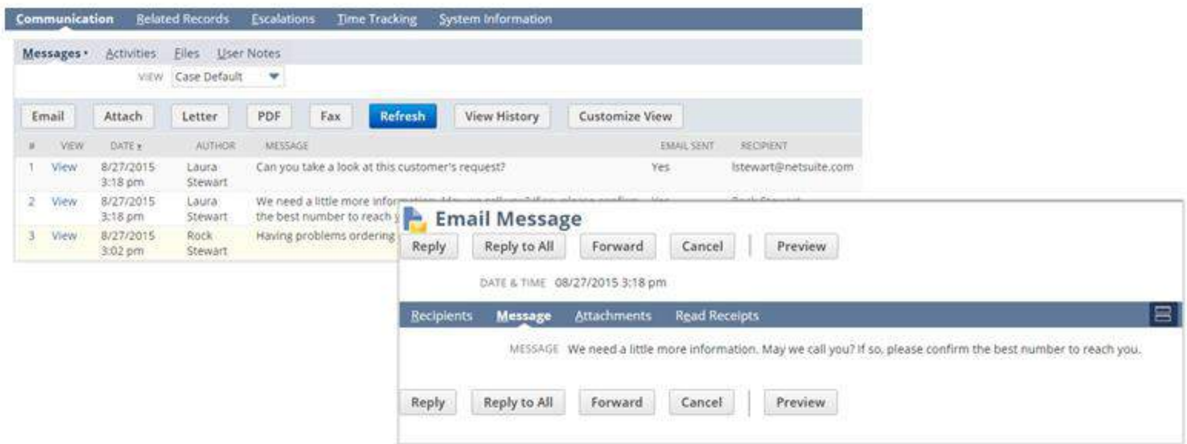
Track Time on a Case

Go to the **Case** record, **Time Tracking** subtab to track time spent working on Case to charge customer:

- Fill in all the necessary information:
- **Save**; this time is now part of the case record

Replying to and Forwarding Case Replies

View the case record; go to the **Communication** subtab and the **Messages** sublist



- Click the **View** line for the message that you want to reply to or forward
- Select the action in the **Email Message** pop-up window by clicking on one of the following:
    - Reply
    - Reply to All
    - Forward
    - Cancel
    - Preview
- A new pop-up window opens and you will need to define the **Recipients**, **Message**, and provide **Attachments** (optional)
- Messages to which you reply are recorded in the message history

Standard Support and Service Reports

Go to **Reports > Cases** to use the Support and Service reports to analyze your levels of service:

Cases
- Open Case Analysis
  - → Detail
- Closed Case Analysis
  - → Detail
- Open Case Escalation
  - → Detail
- Closed Case Escalation
  - → Detail
- Case Activity by Support Rep
  - → Detail

- Monitor Case handling times
- Measure support rep efficiency
- Analyze Case workload and distribution
- Determine Case turnaround time

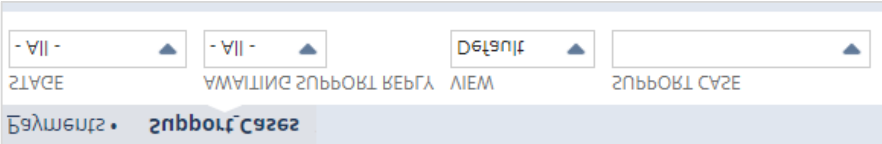
Refer to **Help: Standard Reports**

Activity: True or False

Indicate if the statement is true or false.
1. Cases can only be created manually.
2. Grabbing a case assigns it to "you."
3. Escalating a case transfers ownership of the case.

Current Support Enhancements

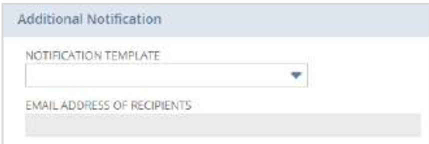
Link Support Cases to Transactions from the **Related Records** subtab, **Support Cases** sublist:



- Seven (7) transactions are supported including sales orders, invoices, and purchase orders; for example, create an invoice for a customer's repair service and the invoice with the support case that originated the service request

Enhancements to Notifications for Online Form Submission:

- Go to **Setup > Support > Online Case Forms > New > Workflow** subtab, **Additional Notification** section



- Set up online case forms to send email notification to a specific list of recipients upon case submission; this is in addition to the customer notification

Please refer to SuiteAnswers for more information

Additional Resources

NetSuite Help Center:
- Support Management

SuiteAnswers Learning Center:
- New Feature Training
- Support

Incorporate Marketing and SuiteCommerce

About this Module

What are other ways to “connect” with the public and extend your NetSuite Functionality? We will introduce how NetSuite can:

- Accommodate multi-channel marketing campaigns
- Help with delivering consistent, engaging and personalized shopping and service experiences from various devices

Objectives

1. Consider the benefits of NetSuite Marketing features
2. Identify NetSuite’s SuiteCommerce features
3. Locate additional NetSuite resources to assist with incorporating marketing and ecommerce into your implementation

Introducing Marketing Automation?

Marketing Automation works across many areas of your NetSuite Account, including CRM and SFA:

- Set up **Marketing Automation** and use the associated tools to meet your requirements
- Work with **Lead Management**
- Reach your customers effectively; create targeted and customizable **Templates** for email marketing
- Consider your **Audience**
- Use different marketing **Events**
- Drive your **Sales** and get real-time **ROI** numbers

Streamline and automate your marketing processes:

- Use multi-channel campaigns
- Obtain real-time visibility into the lead-generation to sales-execution processes
- Prime your sales pipeline
- Track the effectiveness of your marketing efforts

Setting Up Marketing Automation

Framing Campaign Automation

- Configure your NetSuite Account, enabling features and defining preferences facilitating marketing automation
- Define marketing preferences and work with different lists of value to manage your campaign data

Building Campaign Components

- Maximize communication avenues using templates and promotional URLs
    - Templates: over and over, a standard look and feel for your marketing
    - Promotional URLs: create short and descriptive Web site URLs (Universal Resource Locator) that link to online forms, and other marketing tools
- Develop leads and sales opportunities:
    - Customer Imports
    - Use an on-line form to get a new lead directly into NetSuite for use by marketing and sales
    - Get more data mining capability through Upsell Manager
- Who is your target audience for your marketing efforts?
    - How about a dynamic group of customers?

Launching Campaigns

- Use various campaign events or channels
  - Email campaigns for targeted and effective marketing communications to your audiences
- What about leveraging from the Web, using Keyword Campaigns?
- Incorporate Lead Nurturing
- Get insight how well you marketing efforts are working

Introducing NetSuite SuiteCommerce

NetSuite's SuiteCommerce lets you provide experiences for B2C and B2B businesses by connecting with order management, customer service, inventory, merchandising, marketing, and financials:

- **Build and deploy** a simple website or a full functionality Ecommerce; set up **the appropriate Web Site**
- Organize and maintain your web presence with content that is always current and easy to navigate
- **Manage your Web presence** with current **Content** and easy **Navigation**
- **Synchronize and improve visibility** across your business to facilitate **Shopping**, **Selling, Accounting** and **Customer Service**
- Capture **Lead** information
- Report on your web activities, along with other reporting functions

Use Case: Web Order to Payment Process

SuiteCommerce Overview

In a single cloud platform, deliver true omnichannel shopping and service experiences combining ecommerce, in-store POS and order management with your back-office systems:

- **360° CUSTOMER VIEW**: A single view of all customer interactions and transactions across all touch points and channels.
- **INTELLIGENT ORDER ORCHESTRATION:** Customers can buy, fulfill and return anywhere; your company maximizes profitability with centralized order management and a single view of inventory
- **INNOVATIVE EXPERIENCES:** Rapidly create unique, personalized and compelling mobile, web and in-store experiences that differentiate your brand and exceed your customer expectations
- **UNLIMITED EXPANSION:** Quickly deploy sites for multiple business models, channels, brands, countries, currencies and languages all on the same platform.

SuiteCommerce Products

SuiteCommerce Advanced Web Sites:

- Implement a web store that includes the full shopping, cart and checkout, and my account experiences for B2C and B2B businesses

Site Management Tools:

- Manage content, add landing pages, and enhance existing pages on your SuiteCommerce Advanced website through a user interface

SuiteCommerce Site Builder Sites:

- Legacy e-commerce solution by NetSuite; includes access to SSP application platform and free access to SuiteApps to add functionality to your e-commerce site and checkout.

NetSuite Point of Sale:

- The in-store register component of the SuiteCommerce product line

SuiteCommerce InStore:

- Web-based point-of-sale application available for the U.S. market

Review of SuiteCommerce Features

Determine whether to use Site Builder or SuiteCommerce Advanced:

- This table compares different Site Builder web sites with SuiteCommerce Advanced

Web Site Components	Site Builder				SuiteCommerce Advanced
	Standard Site	Advanced Site Customization	Hosted HTML	External Catalog Site	SuiteCommerce Advanced Site
Look and Feel	Basic Site Themes and Layouts provided by NetSuite	Limited customization with CSS	Full customization	Full customization	Full customization
Site Setup	Point-and-click Web Site Setup page	Point-and-click Web Site Setup page	Point-and-click Web Site Setup page Uploading HTML pages to file cabinet.	Point-and-click on Web Site Setup page All web development and HTML file hosting outside of NetSuite	Advanced site setup page
Site Templates	Basic templates included	Basic templates included HTML customization capabilities	N/A	N/A	Available for each module included in SuiteCommerce Advanced and fully customizable.
Site Development Tools	Point-and-click	HTML customization capabilities in Themes and Layouts NetSuite Web Site tags	HTML limited JavaScript and SuiteScript	HTML, and JavaScript	Developer Tools based on Node.js and Gulp.js. Developer Tools are delivered with the SuiteCommerce Advanced installation and integrated in a local development environment.
Product Display	Point-and-click	Point-and-click	Add links to NetSuite item records in your custom HTML.	Add links to NetSuite item records in your custom HTML .	Available through Item Search API

Additional Resources

NetSuite Help Center Topics and User Guides:

- Marketing
- SuiteCommerce
- Marketing and SuiteCommerce Guides

SuiteAnswers:

- Marketing
- SuiteCommerce

SuiteCommerce Web Resources:

- Overview: http://www.netsuite.com/portal/products/suitecommerce.shtml

SuiteTraining:

- Contact training@netsuite.com

NETSUITE | SuiteTraining

NetSuite on the Go!

About this Module

NetSuite provides different solutions for mobile access to your NetSuite Account to:

- Drive business performance
- Give users real-time access to needed information with the ability to log in anytime, anywhere
- Gives sales employees access to NetSuite records while traveling

Objectives

1. Look at CRM for mobile devices
2. Describe NetSuite for iPhone capabilities
3. Identify NetSuite for Android capabilities
4. Consider Outlook Integration
5. Identify SuiteSocial capabilities

CRM Access for Mobile Devices

Accounts with CRM+ can give users anytime / anywhere mobile access:

- Supports iPhone, Blackberry or Android
  - Support provided by both NetSuite and NetSuite SuiteCloud partners
- Provides sales users with real-time access to key, business information:
  - Access the latest business reports and business metrics
  - Manage calendar information and accept/decline meetings
  - See customer and opportunity details
- Integrates with social and productivity tools using SuiteSocial platform:
  - Supports cross-departmental collaboration for opportunities, orders and other transactions
- Outlook Integration supports calendar and contact synchronization
- Google Apps (via Celigo) supports calendar and contact synchronization for Gmail
  - The OpenID Single Sign-on feature supports inbound single sign-on to NetSuite from Google Apps
  - A registered Google Apps domain is required to use the OpenID Single Sign-on feature
  - NetSuite Account administrator completes the steps for Setting Up Google OpenID Access to NetSuite,
  - Users complete the steps for Adding the NetSuite Gadget to the Gmail Sidebar
  - Users log in to NetSuite from Gmail by clicking the Login to NetSuite button.

NetSuite for iPhone

The NetSuite for iPhone app; access to your key business information so you can monitor business activities anytime and from anywhere:

- Free to use for all NetSuite customers; requires no set up or special
- View your NetSuite dashboard including KPIs, scorecard, trend graphs, report snapshots, recent records, and reminders
- View calendar activities, accept or decline events, and mark tasks as complete
- Search, view and edit records including contacts, customers, employees, cases, issues, leads, opportunities, prospects, estimates, and sales orders
- Work remotely, placing calls, sending emails, finding locations with Google Maps, and opening Web pages
- Review release notes and SuiteAnswers for recent enhancements

NetSuite for Android

NetSuite for Android allows mobile access:

- Manage expenses and attach copies of receipts. See Tracking Expenses in NetSuite for Android.
- Create and submit expense reports for accounting approval. See Creating and Editing Expense Reports in NetSuite for Android.
- Log and manage billable time effectively. See Tracking Time in NetSuite for Android.
- Manage your NetSuite calendar. See Using the Calendar Feature in NetSuite for Android
- Keep abreast of key business information with complete support for Home and Employee center dashboard portlets. See Dashboard Portlets.
- Log inbound and outbound business calls from your device and assign them to companies and customers. See Logging Calls in NetSuite for Android
- View, edit and attach files to records
- Review release notes and SuiteAnswers for recent enhancements

Outlook Integration

Windows-based application that allows you to save email messages from Outlook into NetSuite and to synchronize your events, tasks, phone calls, and contacts:

- Access the managed **Outlook Integration SuiteApp** from **Setup > Company > Enable Features > SuiteCloud** subtab
- Control the following to allow you to configure the application to work seamlessly with your current business processes:
  - How frequently you sync
  - Which records from your account are synced
  - How conflicts between NetSuite and Outlook are resolved
- Use controls that allow administrators to pre-configure the application to make the setup process easier for users and control how users synchronize their data
- Works with specific operating systems and internet browsers – Review help topics for supported browsers

SuiteSocial – Social Collaboration Tool

More tightly connect social interactions of NetSuite data and track important changes to that data:

- Interactive newsfeeds: Posts and updates by you and colleagues you follow:
  - Real-time posts when relevant NetSuite records are created or edited
  - Easily access records you are following
- Integrate with 3rd party social networking applications, such as Yammer
- Get social collaboration features natively in NetSuite
- SuiteSocial is a SuiteApp built on the SuiteCloud platform:
  - Made up primarily of custom records and client/server SuiteScripts
  - **Setup > Company > Enable Features > Company** subtab, **Social** section

Go Live and Maintain NetSuite

About this Module

Your implementation may be coming up or it may already be in progress. You may be curious about:

- How will the implementation be structured?
- What are key tasks, as the Administrator, which I need to take care of?
- Where do I get information?

Objectives

1. Review the phases of a NetSuite implementation
2. Address User Adoption
3. Define the pre-go live tasks
4. Prepare for the go live date and cutover event
5. Identify the administrators' ongoing tasks
6. Review Roles, Permissions and Centers
7. Find where to vote on enhancements
8. Identify NetSuite resources that can assist you
9. Complete an online, course evaluation

Stages of an Implementation Project

The implementation project is managed through a business process-driven approach and milestone-based approach:

- View the Web Page, outside of your NetSuite account, at: http://www.netsuite.com/portal/services/consulting/methodology.shtml

NetSuite One

		Phase Objective	Key Deliverables
Initiate	→	"Getting organized"	• Project objectives • Functional scope
Analyze	→	"What are the needs of your business"	• Business requirements • Project workplan
Design	→	"How NetSuite addresses your business needs"	• Customization Solution Design • Integration Design
Configure	→	"Adapting NetSuite to your business"	• NetSuite customizations • Data migration details
Validate	→	"Are you ready to run your business on NetSuite?"	• A production ready solution
Deploy	→	"Run your business on NetSuite"	• Migrate Data • End-user training
Optimize	→	"Learn from your implementation"	• Transition to NetSuite support

Implementation Project Plan

Develop and follow a project plan to communicate the schedule, duration, and ownership of project activities:

% Compl		Task Name	Duration
[illegible]		Configuration Phase 2	[illegible]
5%		NetSuite Implementation	619 days?
0%		3. Configure	584 days?
0%		Configure Application	584 days?
0%		Company and Organizational Structure	15 days
0%		Custom Forms/Form Layouts	10 days
0%		Session Content	5 days
0%		Entity Forms	5 days
0%		Address Form	5 days
0%		Transaction Forms	5 days
0%		Transaction Form Layouts	5 days
0%		Review Form Requirements List based on BRD	5 days
0%		Product/Service Offerings and Pricing Structure	13 days
0%		Basics	8 days
0%		Session Conent	5 days
0%		Non-Inventory, Service, Other Charge	5 days
0%		Item Groups, Kits and Subtotals	5 days
0%		Discounts and Markups	5 days
0%		Item Costing	5 days

- A project plan is an essential part of a successful implementation
- Use a tool of your choice, such as “MS Project”

Walkthrough: User Adoption

Review the User Adoption Tools in SuiteAnswers

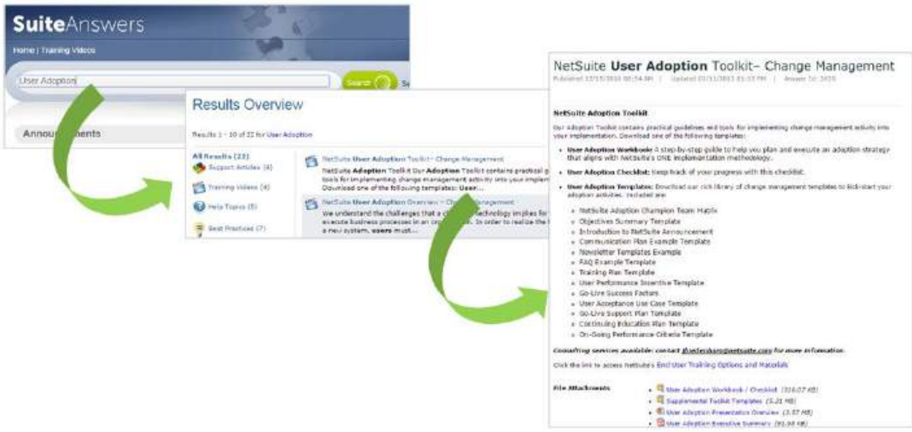
Use Case: Drive successful user adoption through repeating a cycle of:

- **Alignment** – Ensure your objectives, benefits, management team and end users are strategically positioned around the change initiative.
- **Communication** – Create a strong communication plan to promote awareness and minimize surprises.
- **Training** – Educate users on fully tested technology using a role-based, day-in-the-life approach to drive appropriate system usage.
- **Support** – Create a support plan to promote user proficiency and continuing education.
- **Measurement** – Motivate users through incentives and predetermined performance

When introducing a new technology to your users you can use:

- Guidelines
- Tools
- Change management activities

User Adoption in SuiteAnswers



Now it's Your Turn

Access the NetSuite User Adoption Tools

Time: 1-2 minutes

Scenario: Familiarize yourself with tools; in this exercise, you:

- Access the **NetSuite User Adoption Toolkit** from SuiteAnswers and confirm that you can open it

1 Go to your **Support** tab, S**uiteAnswers** portlet and **Go to SuiteAnswers**

2 In **SuiteAnswers**, click on **Training Videos**

3 In the left-hand list, scroll down and click **User Adoption**

4 Select **NetSuite User Adoption Toolkit:**

   a. Scroll down to **File Attachments** and download the NetSuite User Adoption Toolkit
   b. **Open the zip file** to view the PDFs, Excel worksheets and PPT.
   c. Try accessing the **NetSuite User Adoption Quick Guide**

5 **Confirm your success with the instructor**

6 **End.**

Our adoption toolkit provides templates and easy- to- follow steps that infuse your project with practical change awareness activities that promote user adoption, and allow you to realize a quicker return on your NetSuite investment.

- **Adoption Workbook**: Step-by-step guide to help you plan and execute an adoption strategy.
- **Adoption Checklist**: Checklist to keep track of your progress.
- **Adoption Templates**: Rich library of change management templates to support your adoption activities.
- ***Note:*** Education Services Consulting Available.

Go Live Checklist

Before your go live, review the project plan to ensure all action items are complete and validate that:

- All forms and layouts have been configured
- Check have been ordered
- A cycle count of all inventory has been completed
- All opening balances have been entered for accounts and inventories
- All test data has been deleted and real data has been entered/imported
- You have reviewed and ensured that all users have the appropriate Roles and Permissions
- A training strategy has been defined and is ready to begin (if it has not already)
- User acceptance testing has been completed and approved

Go Live Date and Cutover Event

When determining the go live date:

- Schedule the cutover to provide sufficient time for any last-minute changes
- Assume an increased level of support will be needed during the days and weeks around the cutover period:
    - The NetSuite standard implementation includes two weeks of cutover support
        - You can choose to extend this period if necessary
    - Onsite cutover support is also available
        - You have access to real-time Support to issue resolution

After Rollout

Often the entire NetSuite application is not installed in the initial project, for example:

- Phase 1: CRM and SFA
- Phase 2: Financials
- Phase 3: Customer Support

When implementing different areas, at different times, it is important to:

- Review the successes and challenges of the NetSuite implementation to improve future projects
- Plan for on-going support of the application
- Identify and address unresolved issues and items

Administrator's Typical On-going Tasks

What are some of the key administration, on-going responsibilities?

- Maintenance and daily management of the NetSuite account
- Technical and system administration, including data integration with multiple systems: e-mail marketing solution, member data mart, Web site and inventory management system
- Planning, reviewing and customizing NetSuite as needed to meet needs of staff; update roles, permissions, dashboards, etc. as your business requirements change
- Stay informed about new enhancements and features and utilize as they become available in new releases:
  - Use the New Release portlet in the account
  - In SuiteAnswers, review: **Webinar: Preparing for NetSuite's Major Release**
    - This Webinar addresses a previous release, but also speaks to the general process of preparing for a NetSuite Release
- Providing front line support with regards to all aspects of NetSuite and data maintenance and primary point of contact to NetSuite Support

Review Roles, Permissions and Centers

Implementation projects can be working up against tight deadlines. Sometimes roles and permissions may not have received the proper attention. Now might be a good time to review this area.

Users must have the correct role, permissions, and center:

- Check before go-live and validate when adding new users after go-live or as people's jobs change
  - Review your custom roles; review all the tasks users tackle and match to required permissions
  - Remember that using Standard roles is NOT recommended
- Review the permissions of each custom role created:
  - Reference the **Standards Roles Permission Table** in **Help**
  - Compare roles: Go to **Setup > Users/Roles > Show Role Differences**
- Evaluate any potential need for a custom center
- Educate users, with multiple roles, the need for switching roles to match the tasks being attempted:
  - Using the appropriate role, with the defined access to records, is another way to protect the data and conform with the requirement to have a segregation of responsibilities

Revisit Password Management

Administrators may need to revisit password management, which was discussed in the Navigation module – in your Getting Started Workbook:

Administrator, go to **Setup > Company > General Preferences:**

- **Password Policy**: enforces specific requirements
    - **Strong:** minimum length of 10 characters, at least 3 of these four character types —uppercase letters, lowercase letters, numbers, non-alphanumeric characters – this is the default setting
    - **Medium**: minimum length of 8 characters, at least 2 of these four character types: uppercase letters, lowercase letters, numbers, non-alphanumeric characters
    - **Weak** (Not Recommended): minimum length of 6 characters
    - All three password policies continue to enforce validation against these basic criteria: significant difference from previous password, use of only legal characters.
- **Maximum Password Length**: dictated by the password policy defined
    - The default value for this field is determined by the selected password policy.
    - You can, if desired, make the minimum password length value longer than the minimum required by the policy. You cannot make this value shorter.
    - Passwords for new users logging in with the Customer Center role, and for web site shoppers, require a minimum of six (6) characters. Passwords for Customer Center users and web site shoppers who existed before that release were not affected by this change.
- **Password Expiration**: number of days a login password can be used before a user is prompted to change it
    - Days are calculated from the date that each user last changed their password, not from the date that the company preference is changed.
    - It is strongly recommended that administrators set this value to a minimum of 180 days.
        - The maximum number of days will take a very large number, which should accommodate most companies.
    - To comply with Payment Card Industry (PCI) standards, employees with access to view unencrypted credit card numbers are automatically required to reset passwords every 90 days, unless the limit set here is shorter.

NetSuite Account Security

We provide enterprise-class data management, security & availability:

Application security:
- Role-level access and idle disconnect
- Strong 128-bit encryption
- Access only to the NetSuite application, not the underlying database
- IP address restrictions
- Strong password policies

Operational security:
- Comprehensive security certifications
- Continuous security monitoring
- Managed physical access
- Fully guarded premises
- Continuous data center performance audits

Data Management:
- Multiple levels of redundancy to guard against failure
- Disaster Recovery protocols
- "Hot Backups" to restore your data rapidly and reliably
- Offsite backups
- Scalability to address increased volume and transactions

Availability:
- Multiple data centers
- Completely redundant internet connections and backup power systems
- HVAC systems, Fire suppression and Seismic engineering

Energy efficiency using cost-effective and sustainable practice

Please refer to our SuiteCloud Infrastructure Web page for more information:

http://www.netsuite.com/portal/platform/infrastructure.shtml

Access Enhancement Voting

Customers, who have purchased NetSuite Support and have the Support Center role, can vote on enhancement requests:

- Go to **Support** tab, click the **Go to SuiteIdeas** in the **SuiteIdeas** portlet
  - If not visible, contact your administrator to add the permission to your role
- Click one of the following links within the SuiteIdeas site:
  - **Search** to see if your idea has been requested by others.
  - **Browse** for ideas by categories.
  - View new ideas, the most recently updated ideas, and ideas that have received the most votes.
  - View the ideas you have voted for.
  - Clicking an idea opens it in a new window.
- If you find the idea you are looking for, click **Vote for this Idea**.
- Rate the idea, and click **Submit Vote**.

NetSuite Resources

NetSuite provides various resources to you:

- **Help Center**
- **SuiteAnswers** provides:
  - Announcements, Release Information, Trending Now, New Answers
  - Help topics, Support Articles, Training Videos and recorded Webinars
  - **Phone Support**
    - You can get your NetSuite Account number when you choose to contact support by phone
  - **Additional Resources**
    - E.g. Contact NetSuite Training
- Join the **User Group** from your **Support** tab, **User Group** portlet:
  - Communicate with other customers and Certified Consultants to ask questions and trade tips

SuiteSupport

Contact Support if you need a "**How do I**_______?" question answered

You have the various support options; complemented by an extensive library of detailed online help and other resources such as:

- FAQs, online user guides, sneak peeks at upcoming releases, and tips that will help you get the most from **your NetSuite application**

	Silver	Gold	Platinum
Coverage Hours	M-F 8AM-6PM (Customer local time)	Toll-free 24x7 (Severity 1 & 2) M-F 8AM-6PM Customer local time (Severity 3 & 4)	24X7 Case Submission (All severity levels) M-F 8AM-6PM Customer local time (All other services)
Access to SuiteAnswers Technical Support Portal	Standard	Standard	Standard
Online Case Submission	✓	✓	✓
Telephone Case Submission		✓	✓
Authorized Support Contacts in Your Organization	2	4	6
Dedicated Platinum Team			✓
Support Account Manager			✓

- View more information at: [SuiteSupport](http://www.netsuite.com/portal/services/support.shtml) or http://www.netsuite.com/portal/services/support.shtml

Note: Work with Professional Services for the "How SHOULD I" type of question

Authorized Contacts for Support

To improve NetSuite Support response times and develop a scalable Customer Support, NetSuite has adapted the Authorized Contacts process in line with your Terms of Support Service:

- NetSuite Terms of Support Service: http://www.netsuite.com/portal/resource/terms-of-support-services.shtml
- The number of Authorized Contacts will be based on the Support Type
- Review the Supplemental Support Terms and Support Offering Comparison Chart

SuiteSupport - Supplemental Terms and Support Offering Comparison - 2/27/12				
	Silver	Gold	Platinum - Netsuite	Platinum - OpenAir
Coverage hours	8AM-6PM (customer local time) on Business Days	24X7 Severity 1 & Severity 2	24X7 All Severity Levels	24X7 All Severity Levels
Access to SuiteAnswers Technical Support Portal	Standard	Standard	Standard	Standard
On-line Case Submission	Y	Y	Y	Y
Telephone Case Submission	N	Y	Y	Y
Authorized Support Contacts	up to 2	up to 4	up to 6	up to 6
Dedicated Platinum Team	N	N	Y	Y
Platinum Support Manager*	N	N	Y	Y
Release Preview Testing Assistance (up to 10 key user processes)	N	N	Y	N/A

*The Platinum Support Manager is the NetSuite contact that can facilitate monthly update calls to review support usage, observations and recommendations.

  - Also, found in this link http://www.netsuite.com/portal/resource/terms-of-support-services.shtml
- Manage Authorized Contacts via NetSuite Account Center
- Administrators are not automatically set up as authorized contacts
  - Authorized users are people specified by their company and can have any role, including the Administrator role.
  - To ensure continued world-class customer support, please make sure that you are set up as one of the Authorized Contacts in your NetSuite account before calling and/or submitting a case online.

Please review SuiteAnswers for additional FAQs:

- https://netsuite.custhelp.com/app/answers/detail/a_id/38154/kw/authorized%20contacts

Revisit Best Practices

Access a list of **Best Practices**, developed by NetSuite Professional Services and other subject matter experts:

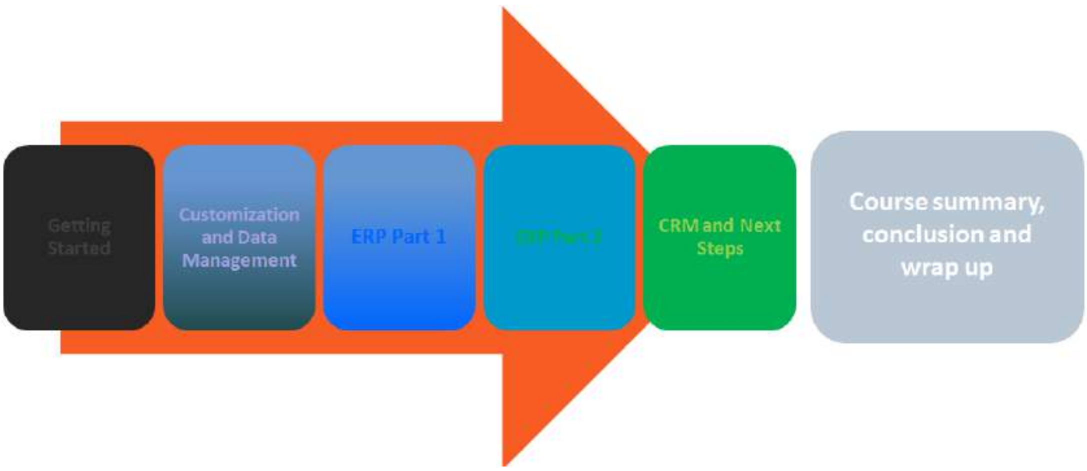
- Go to the **SuiteAnswers** type in “Best Practices” in the search box
- The **Results Overview** will list various types of results:
  - Support Articles
  - Training Videos
  - Help Topics
  - SuiteWorld Presentations

NetSuite Evaluation

Your feedback is important to us, so please take a few minutes to complete an online evaluation:

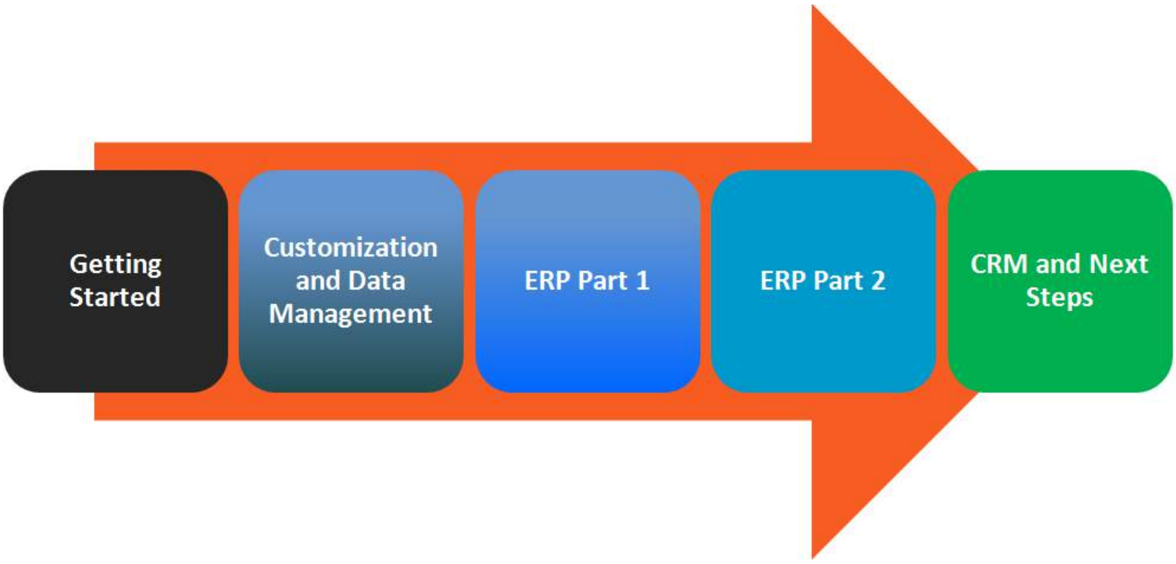
- Course Name: **Essentials**
- Start Date:
- Location: Virtual
- Instructor

CRM and Next Steps is done, next the Course Summary



Summary and Wrap Up

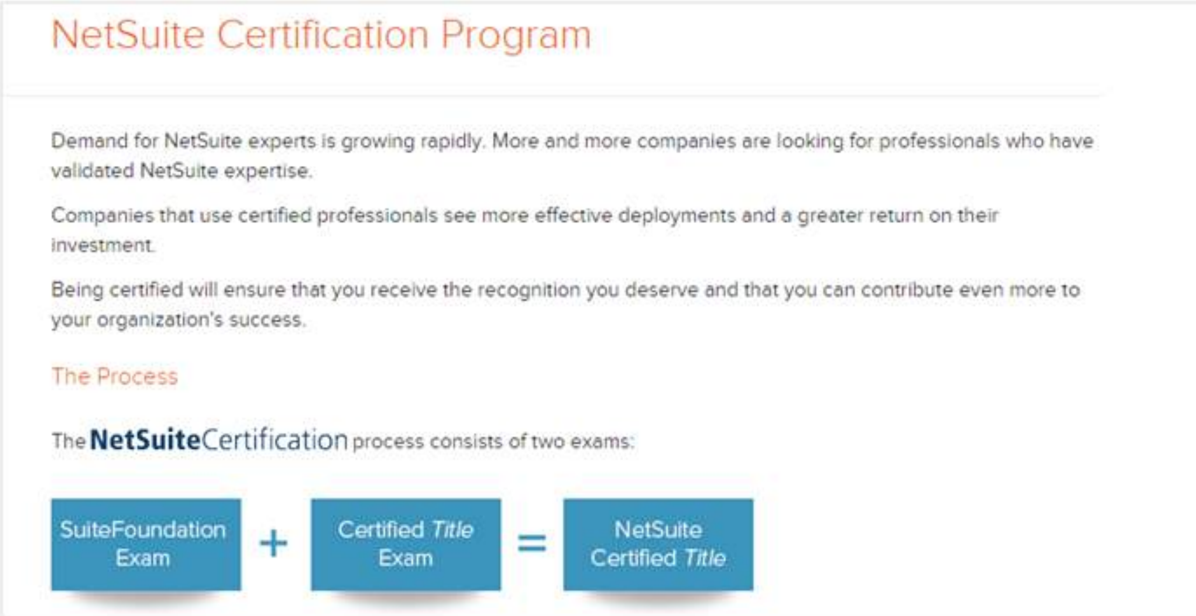
The Path You Have Travelled



NetSuite Certification

NetSuite ERP Consultant Certification Program:

- Become a certified in various areas of NetSuite
- Complete and pass two exams; certification fees may be applicable for each exam
- **Please refer to the Certification Program page:** http://www.netsuite.com/portal/services/training/certification.shtml for more information
    - You can also navigate from the NetSuite Visitor page, under the Services menu



You are DONE!

Thank you for your participation:

- If you have not already done so, please complete the online evaluation
- Have a successful implementation

This is the end of the topics and exercises; the appendix follows.

Workbook Appendices

The following section is for you reference.

Register for the NetSuite User Group

<u>Do not complete these steps during class</u>

Time: 1-2 minutes

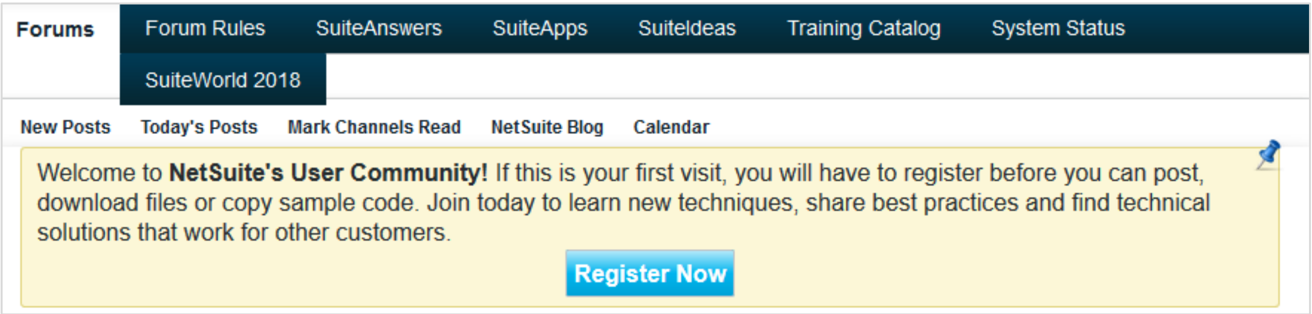
Scenario: The NetSuite User Group can be another resource for finding and sharing information. Use the following steps to submit a request to join.

Within 24 to 48 hours, the NetSuite User Group Administrator will notify you through Email that your User Group account has been setup.

1. If you are the administrator, go to **Setup > Company > Company Information**
    a. On the right-hand side, copy your **Account ID**
2. If you are not an Administrator, then navigate to the **Support** tab:
    a. In the **SuiteAnswers** portlet, click on the **Go to SuiteAnswers**
3. The **SuiteAnswers** home page, opens in a new browser tab:
    a. On the right-had side of the page, click Contact Support by Phone
    b. The Contact Us By Phone page displays your **NetSuite Account Number**. Make note of this.
    c. Close the pop-up window.

4 Go back to the **NetSuite Support** tab and click on the **NetSuite User Group** link.

a. The User Group page opens



b. Click the **Register Now** button.

c. Complete all fields

d. Agree to the site's **terms and rules**

e. Click **Complete Signup**

5 It will take some time for your registration to be approved.