



# NETSUITE

McGeever CR/ARR OneWorld 2014.2

CRM Lite

October 2014

## McGeever CR/ARR OW 2014.2 CRM Lite Demo Script

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2014.2

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### Demo Overview

#### Demo Description

This demo script is an overview of NetSuite's CRM capabilities related to Marketing and Support operations. It shows how NetSuite works seamlessly to support lead generation through marketing campaigns as well as how issues and the related solutions are effectively tracked and communicated.

#### Important Notes to SC

- This demo script will provide you with the process and steps to do a basic CRM demo. It includes marketing campaigns, lead generation, and support case handling.
- What is italicized in this demo script is what you say; what is not italicized is what you do.

#### Intended Audience

This demo is suited for the following audience:

- Marketing executives and staff
- Sales professionals
- Support VP and support reps

#### NetSuite Key Features To Highlight

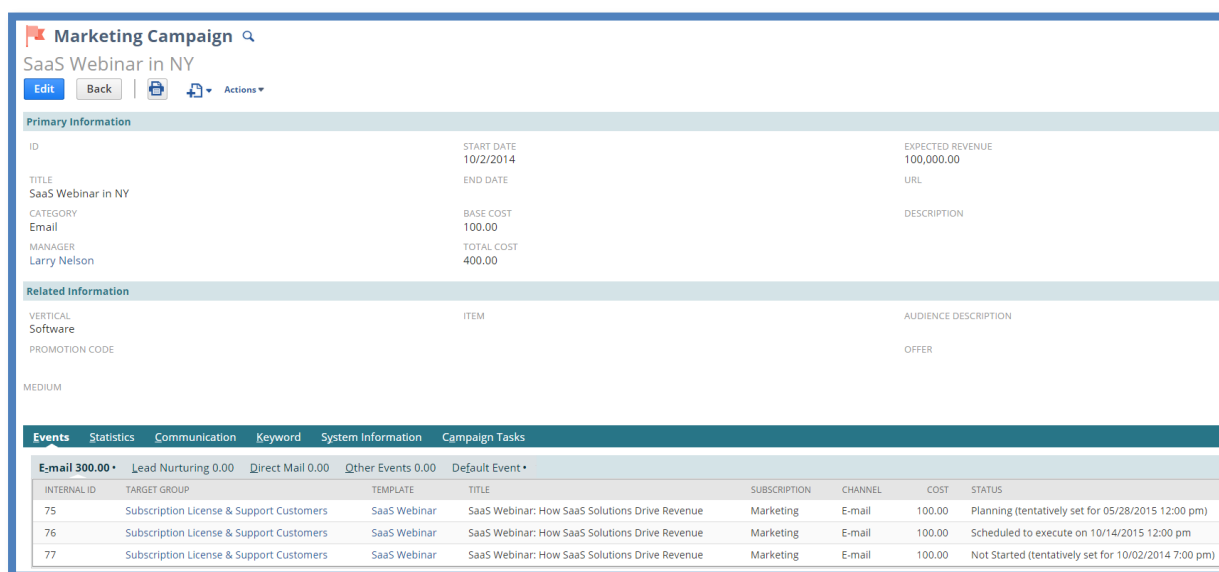
- Drive decision-making with real-time access to marketing and support data
- Generate and manage leads with integrated marketing campaigns and sales force automation
- Enable high-level of responsiveness to customer questions and issues
- Minimize time and effort of data analysis through easily-customized views and reporting
- Ensure accuracy of data with one centralized source of information

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### CRM Lite Demo Marketing

**Note:** Prior to the demo, do the following to set up a marketing campaign event.

- From the Marketing VP – US West role, use the Marketing Campaigns portlet on the Home dashboard to access the SaaS Webinar in NY marketing campaign. Use the arrows on the top left of the portlet to find this campaign in the list. Click Edit on the campaign.
- Change the Start Date of the campaign to today's date (type "T" and hit return in the Start Date field).
- In the Events tab, add a row with the same information as the previous row except for the date. Make the date today's date. Save the campaign.



**Marketing Campaign** 🔍

SaaS Webinar in NY

[Edit](#) [Back](#) [📄](#) [🔍](#) [⚙️](#) [Actions](#)

Primary Information			
ID	START DATE 10/2/2014	EXPECTED REVENUE 100,000.00	
TITLE SaaS Webinar in NY	END DATE	URL	
CATEGORY Email	BASE COST 100.00	DESCRIPTION	
MANAGER Larry Nelson	TOTAL COST 400.00		

Related Information			
VERTICAL Software	ITEM	AUDIENCE DESCRIPTION	
PROMOTION CODE		OFFER	
MEDIUM			

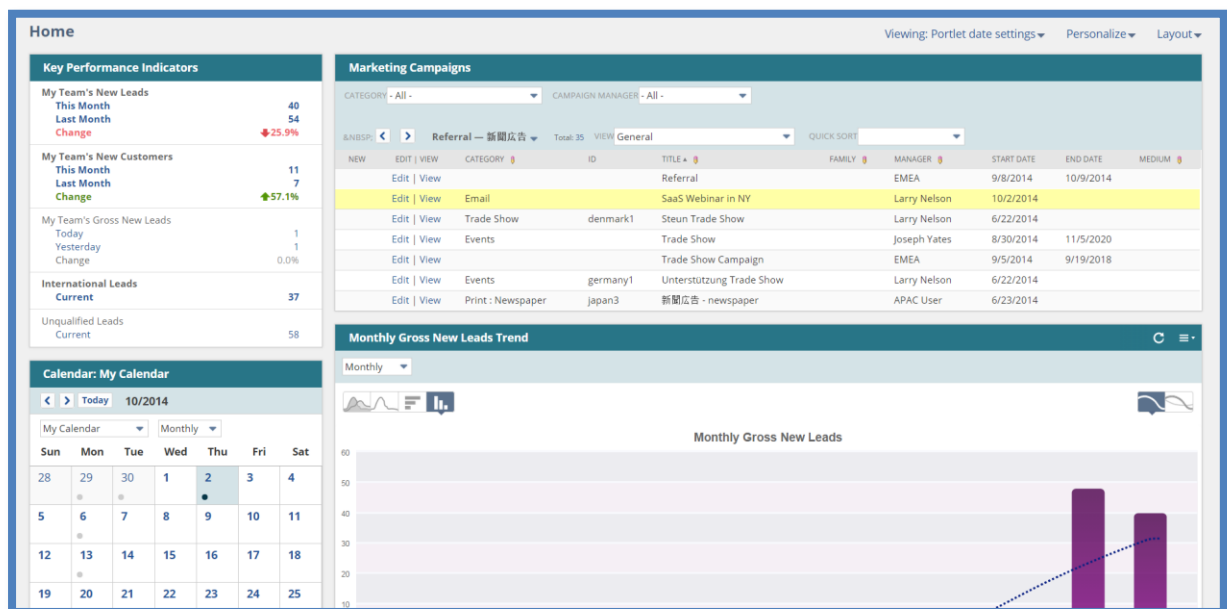
Events								
E-mail 300.00 • Lead Nurturing 0.00 Direct Mail 0.00 Other Events 0.00 Default Event •								
INTERNAL ID	TARGET GROUP	TEMPLATE	TITLE	SUBSCRIPTION	CHANNEL	COST	STATUS	
75	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Planning (tentatively set for 05/28/2015 12:00 pm)	
76	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Scheduled to execute on 10/14/2015 12:00 pm	
77	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Not Started (tentatively set for 10/02/2014 7:00 pm)	

### Marketing VP – US West

1. From the Home dashboard, explain that from this dashboard, you can access whatever information the VP of Marketing needs. *The dashboard is customizable by the user so that the reports, Key Performance Indicators, graphs and reminders can easily be added or removed. The advantage of NetSuite's dashboard capabilities is that each user can define and edit the dashboards that are relevant to their role in the organization. Creating and editing dashboards in NetSuite does not require technical support.*

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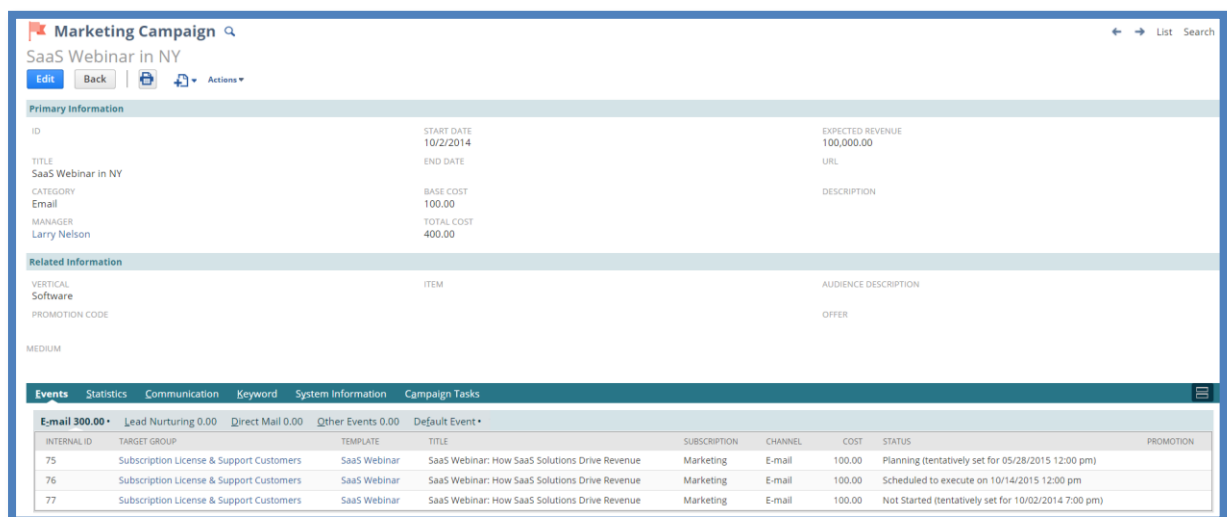
2. **Intacct-Competitive Note:** NetSuite's dashboard flexibility is a significant competitive advantage that former Intacct customers only appreciate after converting from Intacct. The ability to add and edit user dashboards in NS is both flexible and user-friendly. Intacct's dashboard solution requires technical support for additional dashboards and edits to existing dashboards.
3. Mention that there are various elements on the Marketing VP's dashboard that assist him/her in day-to-day analysis and in his/her ability to be proactive and, as necessary, reactive to performance and issues. Mention that the KPIs display real-time results and the reminders are available to assist in completing important tasks.



4. From the Marketing Campaigns portlet, you can access marketing campaigns and events associated with each campaign. Use the right arrow in the portlet to change the display until you see the SaaS Webinar in NY campaign. We have a SaaS Webinar that customers will be invited to via email. The email campaign is scheduled to begin today.
5. **Optional:** Scroll down slightly to show the calendar portlet on the left side of the page. If you have the Calendar portlet on your dashboard, the campaign event (in this case the email launch) will show on the date that the event is set to execute. Hover over the date on the calendar (today's date) to show the event. The calendar must be set up to show campaign events. **Note:** You can set this from within the Setup on the calendar portlet.

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6. Click view on the SaaS Webinar In NY campaign in the Marketing Campaigns portlet. You are on the Marketing Campaign page. *We can create any kind of marketing campaign. Some that you might typically see are TV, radio, magazine and newspaper ads; email campaigns, direct mail, keyword campaigns, trade shows, other events, and referrals. You can set up as many as you need.*
7. **Note:** If you get a message on top of the Marketing Campaign page that some of the recipients in the group experienced hard bounces, explain that the system will prevent you from sending emails to recipients whose email addresses are incorrect or who choose not to receive emails. This lets you know that your campaign is not reaching certain prospects.



The screenshot shows the 'Marketing Campaign' page for a campaign titled 'SaaS Webinar in NY'. The page includes a header with 'Edit', 'Back', and 'Actions' buttons. Below the header, there are sections for 'Primary Information' and 'Related Information'.

**Primary Information:**

ID	START DATE	EXPECTED REVENUE
	10/2/2014	100,000.00
TITLE	END DATE	URL
SaaS Webinar in NY		
CATEGORY	BASE COST	DESCRIPTION
Email	100.00	
MANAGER	TOTAL COST	
Larry Nelson	400.00	

**Related Information:**

VERTICAL	ITEM	AUDIENCE DESCRIPTION
Software		
PROMOTION CODE		OFFER
MEDIUM		

Below the related information, there is a tabbed interface with tabs for 'Events', 'Statistics', 'Communication', 'Keyword', 'System Information', and 'Campaign Tasks'. The 'Events' tab is selected, showing a table of events.

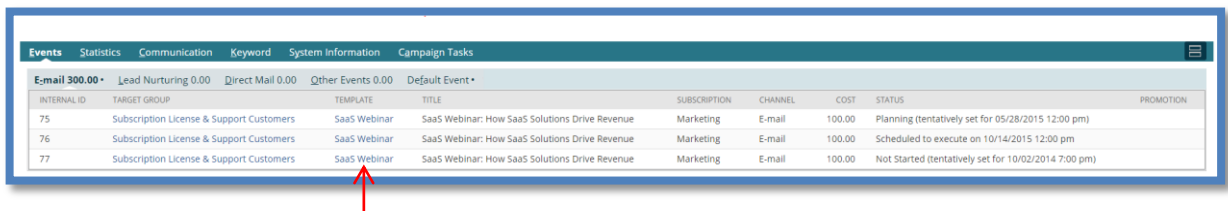
INTERNAL ID	TARGET GROUP	TEMPLATE	TITLE	SUBSCRIPTION	CHANNEL	COST	STATUS	PROMOTION
75	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Planning (tentatively set for 05/28/2015 12:00 pm)	
76	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Scheduled to execute on 10/14/2015 12:00 pm	
77	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Not Started (tentatively set for 10/02/2014 7:00 pm)	

8. Talk about some of the elements on the form and details you can track. Discuss the ability to track cost and expected revenue for the campaign. Open the Statistics tab to discuss how NS tracks total revenue, profit and ROI as well as leads generated and number of purchasers. Explain that having all of this information in one place saves the marketing department time that it would take to gather the data and analyze the results.
9. Open the Events tab and explain that many events can be attached to each campaign. *You'll notice in the Events tab that there are several events attached to this marketing campaign. Each email event can be set up for the same or different target groups.*
10. Explain that this is an email campaign for an invitation to a Webinar in NY. The target group for the event is based on certain criteria. *In NS, you have the flexibility to set up groups that*

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*are static and ones that are dynamic, meaning they are based on certain parameters. You can also use our Upsell Manager to create a group that targets customers who previously purchased a specific product. This is a powerful feature that saves the marketing department time analyzing the likelihood of future purchases based on historical ones.*

11. **Note to SC:** The Upsell Manager is a powerful feature. If appropriate, explain the following to your prospect. For our SaaS Webinar marketing campaign, there is a group (Subscription License & Support Customers) based on customers who might be interested in purchasing professional services because they previously purchased subscription licenses and support. To save our customers time that would be required to do the research, the system used two measures to create the target group. The first measure is the correlation between the percentage of customers who purchased the item we want to upsell and the item they already purchased, and the second measure is the number of customers who purchased both items in the past. Based on these criteria, the system created a group of target customers, called Subscription License & Support Customers. After a group of customers is created by the Upsell Manager, you can then fine-tune the list and choose which customers from this group will constitute the final target group for the marketing campaign. With the Upsell Manager, you can create a list of customers to target, opportunity records for the sales reps to work, or a list of phone calls that display as events on the sales reps' dashboards.
12. Looking again at the email event, mention that this email will be sent to the target group at a planned time and that the user specifies when the system should execute the email.
13. Open the SaaS Webinar template by clicking on the hyperlink for the template of the event you added during demo prep. Open this template in another tab.

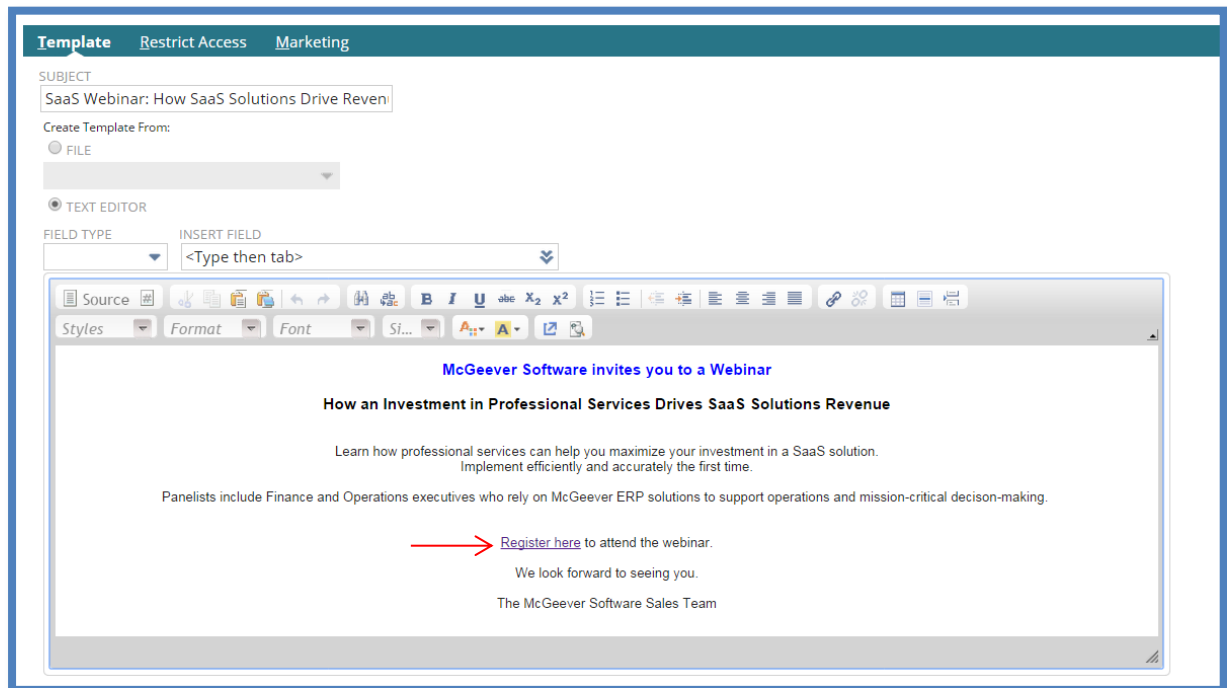


Events								
E-mail 300.00 • Lead Nurturing 0.00 Direct Mail 0.00 Other Events 0.00 Default Event •								
INTERNAL ID	TARGET GROUP	TEMPLATE	TITLE	SUBSCRIPTION	CHANNEL	COST	STATUS	PROMOTION
75	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Planning (tentatively set for 05/28/2015 12:00 pm)	
76	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Scheduled to execute on 10/14/2015 12:00 pm	
77	Subscription License & Support Customers	SaaS Webinar	SaaS Webinar: How SaaS Solutions Drive Revenue	Marketing	E-mail	100.00	Not Started (tentatively set for 10/02/2014 7:00 pm)	

14. On the Campaign Template, click Edit. Focus on the template in the bottom half of the screen. *This is the content of the email that will be sent to customers in the target group. The hyperlink for "Register here" will bring the recipient to an online registration form for the webinar.*



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The screenshot shows the 'Template' editor interface. The subject line is 'SaaS Webinar: How SaaS Solutions Drive Revenue'. The 'Create Template From' section has 'FILE' selected. The 'TEXT EDITOR' is active, showing a rich text editor with a toolbar. The content of the template is as follows:

**McGeever Software invites you to a Webinar**

**How an Investment in Professional Services Drives SaaS Solutions Revenue**

Learn how professional services can help you maximize your investment in a SaaS solution.  
Implement efficiently and accurately the first time.

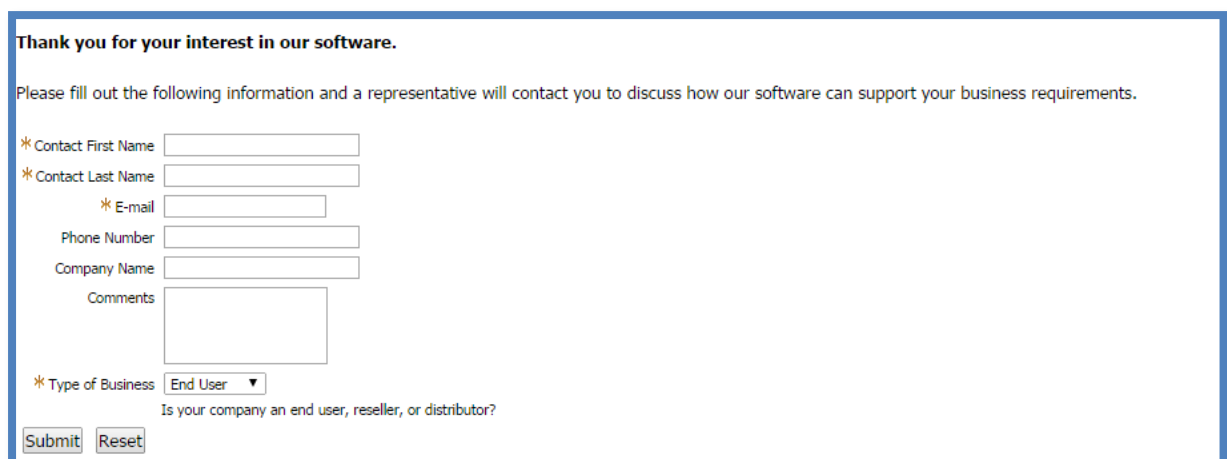
Panelists include Finance and Operations executives who rely on McGeever ERP solutions to support operations and mission-critical decision-making.

[Register here](#) to attend the webinar.

We look forward to seeing you.

The McGeever Software Sales Team

15. *Let's take a look at the online registration form.* Open the shortcut for Online Registration Form. Explain that filling out and submitting information through this form will generate a lead in the system.



**Thank you for your interest in our software.**

Please fill out the following information and a representative will contact you to discuss how our software can support your business requirements.

\* Contact First Name

\* Contact Last Name

\* E-mail

Phone Number

Company Name

Comments

\* Type of Business

Is your company an end user, reseller, or distributor?

16. **Note:** regarding Online Customer Form setup prior to your demo. To customize the look of your registration form for your prospect:

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- In Marketing VP – US West role, navigate to Setup > Sales & Marketing Automation > Online Customer Forms; choose the Online Registration Form;
  - in the Set Up Appearance tab, update color theme and logo for your prospect;
  - in the Set Up Workflow tab, change Redirect To URL to your prospect's url.
17. Fill in the online registration form. *Let's fill in this form so that we can see how this information is automatically set up as a lead in our system.* When you submit the form, you will be redirected to the prospect's url (or to the NetSuite url if you didn't set the Redirect To URL on the Online Customer Form setup). *After submitting the online registration, your prospect is redirected to your website.*
18. From the home dashboard, from the Shortcuts (the Star at the top or the Shortcuts portlet), choose Lead Source Analysis Summary. *With the Lead Source Analysis Summary report, we can see what leads have come in from marketing campaigns, and from our SaaS Webinar campaign, in particular.* Point out the lead from the registration for the SaaS Webinar in NY. Click View Detail to see the lead that was just generated. *Let's now change to a sales rep role and work with this lead.*

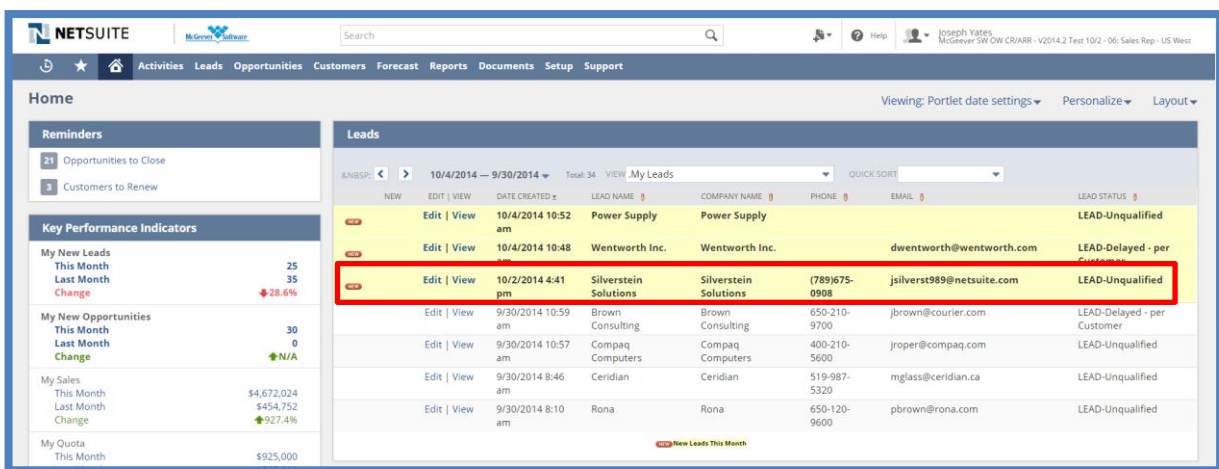
Lead Source Analysis Detail <a href="#">Back to Summary</a>					
Campaign Event	Lead	Company Name	Status	Sales Rep	Lead Date
<input type="checkbox"/> Email <ul style="list-style-type: none"> <li><input type="checkbox"/> SaaS Webinar in NY             <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> SaaS Webinar: How SaaS Solutions Drive Revenue</li> </ul> </li> </ul>	Silverstein Solutions	Silverstein Solutions	Unqualified	Joseph Yates	10/2/2014
<input type="checkbox"/> Events <ul style="list-style-type: none"> <li><input type="checkbox"/> California Launch             <ul style="list-style-type: none"> <li><input type="checkbox"/> - Unassigned -</li> </ul> </li> </ul>	Power Supply International Supplies The Market Place Happy Corner Century Funding Complex Solutions Sampson Cleaning	Power Supply International Supplies The Market Place Happy Corner Century Funding Complex Solutions Sampson Cleaning	Unqualified Unqualified Unqualified Unqualified Closed Won Closed Won Delayed - per Customer	Joseph Yates Sara Torrance Mike Daniels Joseph Yates Joseph Yates Joseph Yates Joseph Yates	10/4/2014 10/4/2014 10/4/2014 10/4/2014 10/4/2014 10/4/2014 10/4/2014

19. Close all but one tab and **switch to the 06: Sales Rep – US West role.**

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### 06: Sales Rep – US West

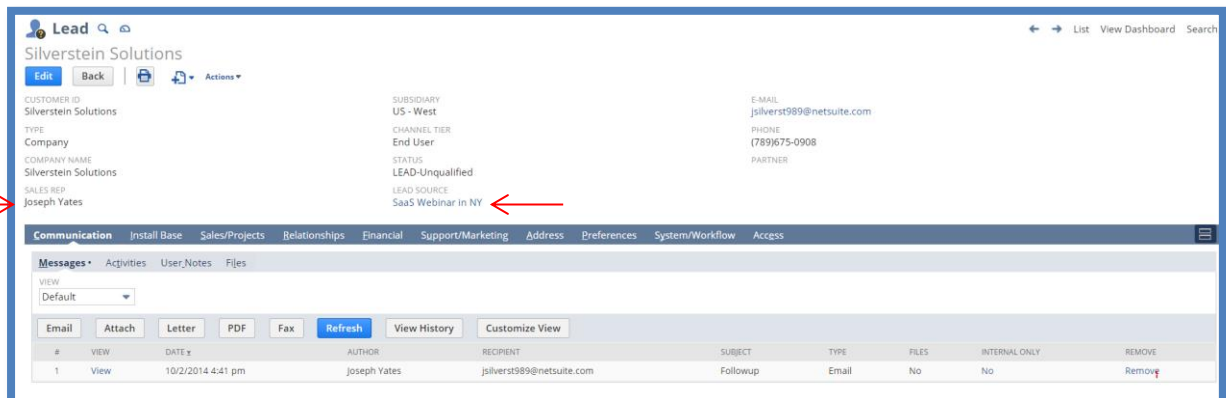
1. Now let's look at the lead that was just created with our online registration form. From the Leads portlet, click on the lead (highlighted in yellow) that you just created. Use the arrows to scroll to the correct date (today's date).



The screenshot shows the Netsuite CRM Home page. On the left, there are reminders and key performance indicators. The main area displays a list of leads. One lead, 'Silverstein Solutions', is highlighted in yellow and red. The lead details are as follows:

DATE CREATED	LEAD NAME	COMPANY NAME	PHONE	EMAIL	LEAD STATUS
10/4/2014 10:52 am	Power Supply	Power Supply			LEAD-Unqualified
10/4/2014 10:48 am	Wentworth Inc.	Wentworth Inc.		dwentworth@wentworth.com	LEAD-Delayed - per Customer
10/2/2014 4:41 pm	Silverstein Solutions	Silverstein Solutions	(789)675-0908	jsilverst989@netsuite.com	LEAD-Unqualified
9/30/2014 10:59 am	Brown Consulting	Brown Consulting	650-210-9700	jbrown@courier.com	LEAD-Delayed - per Customer
9/30/2014 10:57 am	Compaq Computers	Compaq Computers	400-210-5600	jroper@compaq.com	LEAD-Unqualified
9/30/2014 8:46 am	Ceridian	Ceridian	519-987-5320	mglass@ceridian.ca	LEAD-Unqualified
9/30/2014 8:10 am	Rona	Rona	650-120-9600	pbrown@rona.com	LEAD-Unqualified

2. Notice that the information provided through the registration form is displayed here, and the status of the lead is unqualified. Let's go to this lead and look at it further.
3. Click View to go to this lead. Notice that the lead has been assigned to a sales rep (according to territory rules set in the system). Our lead source is captured so that we can track our ROI for the marketing campaign.



The screenshot shows the Netsuite CRM Lead detail page for 'Silverstein Solutions'. The lead information is as follows:

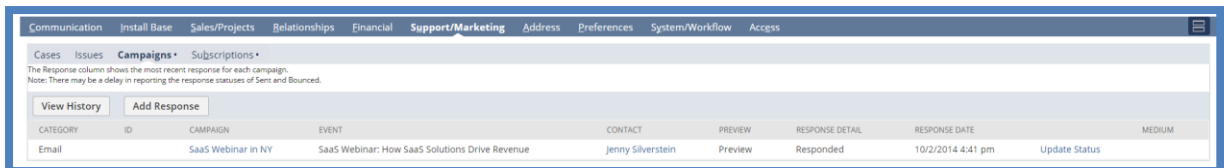
Field	Value
CUSTOMER ID	Silverstein Solutions
TYPE	Company
COMPANY NAME	Silverstein Solutions
SALES REP	Joseph Yates
SUBSIDIARY	US - West
CHANNEL TIER	End User
STATUS	LEAD-Unqualified
LEAD SOURCE	SaaS Webinar in NY
E-MAIL	jsilverst989@netsuite.com
PHONE	(789)675-0908
PARTNER	

The page also shows a list of messages and a communication history table.

#	VIEW	DATE	AUTHOR	RECIPIENT	SUBJECT	TYPE	FILES	INTERNAL ONLY	REMOVE
1	View	10/2/2014 4:41 pm	Joseph Yates	jsilverst989@netsuite.com	Followup	Email	No	No	Remove

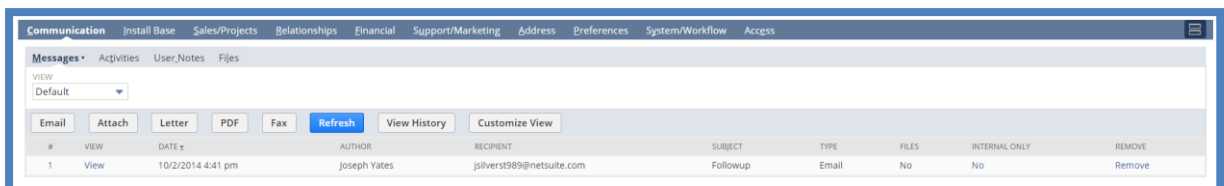
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4. Show the campaign that is stored with this lead. Click on the Support/Marketing tab then on Campaigns subtab. Explain that the campaign is stored with the lead record.



CATEGORY	ID	CAMPAIGN	EVENT	CONTACT	PREVIEW	RESPONSE DETAIL	RESPONSE DATE	MEDIUM
Email		SaaS Webinar in NY	SaaS Webinar: How SaaS Solutions Drive Revenue	Jenny Silverstein	Preview	Responded	10/2/2014 4:41 pm	Update Status

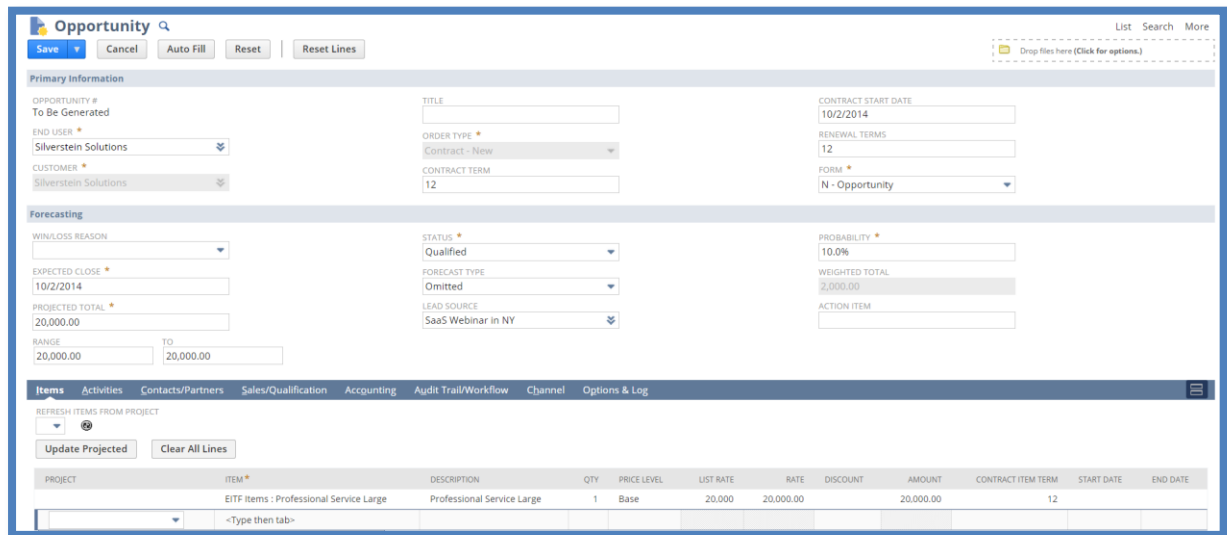
5. Click on the Communication tab and point out that a follow-up message was sent to the person who registered for the Webinar. You can click on View to display the message.



#	VIEW	DATE	AUTHOR	RECIPIENT	SUBJECT	TYPE	FILES	INTERNAL ONLY	REMOVE
1	View	10/2/2014 4:41 pm	Joseph Yates	jsilverst989@netsuite.com	Followup	Email	No	No	Remove

6. *We can easily turn this lead into an Opportunity.* Click on the icon with the plus sign on the top of form. Then choose Opportunity. **Note:** If you receive a message about the Ship To address not being updated, click OK and explain that our demo environment uses Ship To addresses, but we don't need to enter one now.
7. *Notice the status changed to qualified.*
8. *The probability is now 10%.*
9. *Let's say that the sales rep has spoken with the prospect and the prospect is interested in consulting services to ensure the software implementation's success. Let's add an item to this opportunity.* Enter an item (EITF Professional Service Large) and add it.

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**Opportunity** q List Search More

**Save** **Cancel** **Auto Fill** **Reset** **Reset Lines**

**Primary Information**

OPPORTUNITY #  
To Be Generated

END USER \*  
Silverstein Solutions

CUSTOMER \*  
Silverstein Solutions

TITLE

ORDER TYPE \*  
Contract - New

CONTRACT TERM  
12

CONTRACT START DATE  
10/2/2014

RENEWAL TERMS  
12

FORM \*  
N - Opportunity

**Forecasting**

WIN/LOSS REASON

EXPECTED CLOSE \*  
10/2/2014

PROJECTED TOTAL \*  
20,000.00

RANGE  
20,000.00 TO 20,000.00

STATUS \*  
Qualified

FORECAST TYPE  
Omitted

LEAD SOURCE  
SaaS Webinar in NY

PROBABILITY \*  
10.0%

WEIGHTED TOTAL  
2,000.00

ACTION ITEM

**Items** **Activities** **Contacts/Partners** **Sales/Qualification** **Accounting** **Audit Trail/Workflow** **Channel** **Options & Log**

REFRESH ITEMS FROM PROJECT

**Update Projected** **Clear All Lines**

PROJECT	ITEM *	DESCRIPTION	QTY	PRICE LEVEL	LIST RATE	RATE	DISCOUNT	AMOUNT	CONTRACT ITEM TERM	START DATE	END DATE
	EITF Items : Professional Service Large	Professional Service Large	1	Base	20,000	20,000.00		20,000.00	12		

10. Save the opportunity.
11. Explain that this transaction can go through the entire sales process from here to estimate then sales order, invoice and payment without needing to re-key data.
12. Return to the campaign by clicking on the SaaS Webinar in NY in the Lead Source field on the header (and open the campaign in another tab).
13. Show the information in the Statistics tab. *You'll notice that the system is tracking key information about our marketing campaign, like number of leads generated, total revenue, ROI, and profit. If our lead is converted to a sales order that is invoiced, these statistics will reflect that change. And since this is an email event, also show the statistics regarding the email events (e.g. responses, click thru's, bounces, etc.).*

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TITLE SaaS Webinar in NY	END DATE	URL
CATEGORY Email	BASE COST 100.00	DESCRIPTION
MANAGER Larry Nelson	TOTAL COST 400.00	

---

**Related Information**

VERTICAL Software	ITEM	AUDIENCE DESCRIPTION
PROMOTION CODE		OFFER
MEDIUM		

---

**Events Statistics Communication Keyword System Information Campaign Tasks**

TOTAL REVENUE 30,200.00	COST PER LEAD 100.00	LEADS GENERATED 4
RETURN ON INVESTMENT 7,450.0%	COST PER PURCHASER 200.00	UNIQUE VISITORS 0
PROFIT 29,800.00	NUMBER OF PURCHASERS 2	

---

**Event Responses**

[Refresh](#)

EVENT	TYPE	DATE EXECUTED	# SENT	# OPENED	% OPENED	# CLICKED THRU	% CLICKED THRU	# RESPONDED	% RESPONDED	# UNSUBSCRIBED	% UNSUBSCRIBED	# BOUNCED	% BOUNCED
[Default Event]	Default		0	0	0.0%	0	0.0%	1	0.0%	0	0.0%	0	0.0%
SaaS Webinar: How SaaS Solutions Drive Revenue	Email		0	0	0.0%	0	0.0%	3	0.0%	0	0.0%	0	0.0%

14. Return to the opportunity tab and create a sales order by clicking on Sales Order from the icon on the top of the form. If the message about the Ship To address pops up again, click OK.

15. On the Sales Order, enter T (for Today) on the header in the Contract section for Start Date.

Sales Order

SO3160

IN PROGRESS

[Save](#)
[Cancel](#)
[Reset](#)
[Reset Lines](#)
[Allocate Multi-element Sales Revenue](#)
[Actions](#)

Drop files here (Click for options.)

---

**Primary Information**

DATE * 10/2/2014	ORDER # SO3160	MEMO
END USER * Silverstein Solutions	STATUS * Pending Approval	FORM * N - Sales Order
CUSTOMER * Silverstein Solutions	SUBSIDIARY US - West	

---

**Contract**

ORDER TYPE * Contract - New	END DATE 10/1/2015	CONTRACT
START DATE * 10/2/2014	RENEWAL TERMS 12	FROM CONTRACT
CONTRACT TERM 12		

---

**Summary**

SUBTOTAL	20,000.00
DISCOUNT	0.00
TAX ITEM	
TOTAL	20,000.00

---

**Items Channel Accounting Billing Shipping Activities Audit Trail/Workflow Contacts Sales Team**

REFRESH ITEMS FROM PROJECT

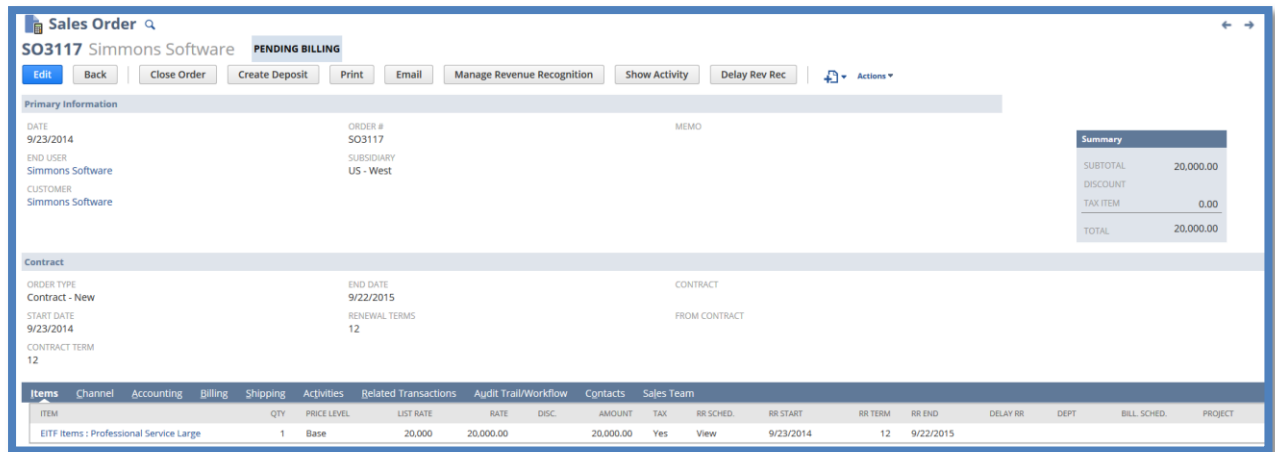
[Clear All Lines](#)

ITEM *	QTY	PRICE LEVEL	LIST RATE	RATE	DISC.	AMOUNT	TAX	RR SCHED.	RR START	RR TERM	RR END	DELAY RR	DEPT	BILL. SCHED.	PROJECT
ETTF Items : Professional Service Large	1	Base	20,000	20,000.00		20,000.00	Yes	Exact Days - Sales Order Date							

16. Save the Sales Order.

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17. Approve the sales order.



**Sales Order** SO3117 Simmons Software **PENDING BILLING**

Buttons: Edit, Back, Close Order, Create Deposit, Print, Email, Manage Revenue Recognition, Show Activity, Delay Rev Rec, Actions

**Primary Information**

DATE 9/23/2014	ORDER # SO3117	MEMO
END USER Simmons Software	SUBSIDIARY US - West	
CUSTOMER Simmons Software		

**Summary**

SUBTOTAL	20,000.00
DISCOUNT	
TAX ITEM	0.00
TOTAL	20,000.00

**Contract**

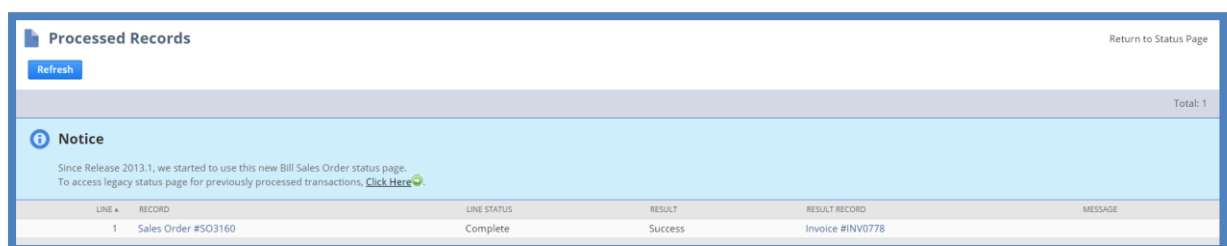
ORDER TYPE Contract - New	END DATE 9/22/2015	CONTRACT
START DATE 9/23/2014	RENEWAL TERMS 12	FROM CONTRACT
CONTRACT TERM 12		

Items	Channel	Accounting	Billing	Shipping	Activities	Related Transactions	Audit Trail/Workflow	Contacts	Sales Team						
ITEM	QTY	PRICE LEVEL	LIST RATE	RATE	DISC	AMOUNT	TAX	RR SCHED.	RR START	RR TERM	RR END	DELAY RR	DEPT	BILL. SCHED.	PROJECT
ETTF Items : Professional Service Large	1	Base	20,000	20,000.00		20,000.00	Yes	View	9/23/2014	12	9/22/2015				

18. Go to the 05: AR Specialist role.

### 05: AR Specialist

1. Explain that we can now bill this sales order. *The AR Specialist is going to bill the sales order. We have a reminder on Specialist's Home dashboard for Sales Orders to Bill. From the Reminders portlet, choose Sales Order to Bill. Sort on the Order #. You might have to click twice on Order # to see the most recent on the top of the list. The SO just created will be on top. Check the box for this one and click submit.*
2. **Note to SC:** This step might take a minute. Refresh the screen a few times, then click the link for Complete.
3. On the next page, click the invoice number. *Let's go to the invoice.*



**Processed Records** Return to Status Page

Refresh

Total: 1

**Notice**

Since Release 2013.1, we started to use this new Bill Sales Order status page. To access legacy status page for previously processed transactions, [Click Here](#).

LINE #	RECORD	LINE STATUS	RESULT	RESULT RECORD	MESSAGE
1	Sales Order #SO3160	Complete	Success	Invoice #INV0778	

## McGeever CR/ARR OW 2014.2 CRM Lite Demo Script

4. Now that the sales order has been invoiced, this revenue has been added to the SaaS Webinar marketing campaign.
5. NS has a number of reports related to marketing campaigns. Let's look at the Sales by Lead Source Summary. Open the shortcut for the Sales by Lead Source Summary. The report date is set to this month to date. This is a report of all the leads that came in and the campaigns that generated the leads for this month to date. We see our lead that was converted to a sales order.

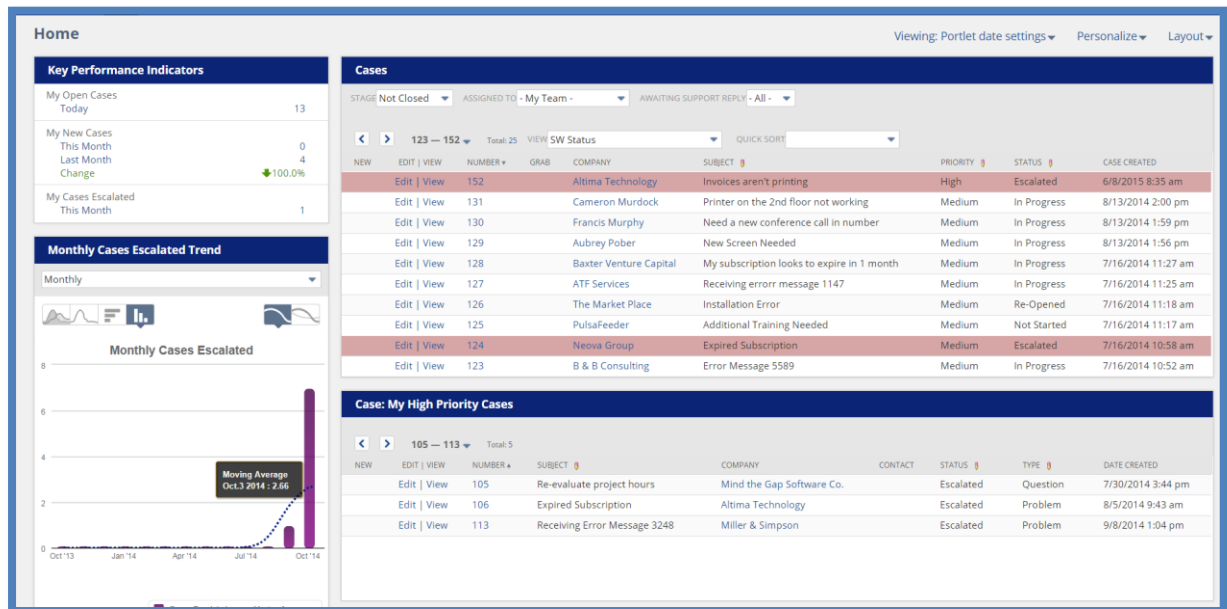
Sales by Lead Source Summary <a href="#">View Detail</a>	
Lead Source	Transaction Total
<input checked="" type="checkbox"/> Email	
SaaS Webinar in NY	\$20,000.00
Total - Email	\$20,000.00
<input checked="" type="checkbox"/> Events	
California Launch	\$72,500.00
Trade Show	\$98,040.00
Total - Events	\$170,540.00
<input checked="" type="checkbox"/> Keyword - Paid	
Google-Prospect Letter	\$1,500.00
Total - Keyword - Paid	\$1,500.00
<input checked="" type="checkbox"/> Partner	
Customer Referral	\$41,775.00
Total - Partner	\$41,775.00
<input checked="" type="checkbox"/> Print	
Ad	\$37,600.00
Total - Print	\$37,600.00
<input checked="" type="checkbox"/> - Unassigned -	
-- No Lead Source --	\$494,675.50
Total - Unassigned -	\$494,675.50
<b>Total</b>	<b>\$766,090.50</b>

DATE this month to date FROM 10/1/2014 TO 10/2/2014 COLUMN Total



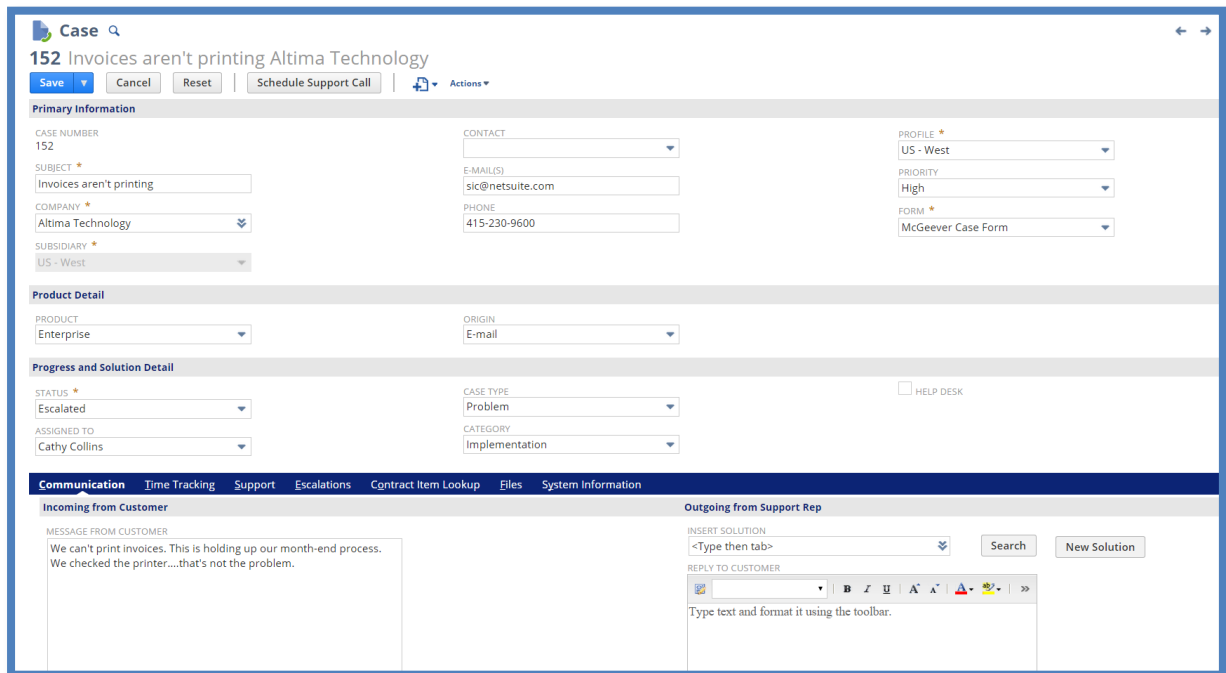


## McGeever CR/ARR OW 2014.2 CRM Lite Demo Script



2. Support cases can be created in four different ways in NS, giving your customers the ability to easily connect with you for their support needs:
  - A support rep can create a case record for a customer who calls in.
  - A customer can complete an online case form.
  - A customer can send an email to your support address.
  - A customer can click the Contact Support link in the Customer Center of your Web site and fill out an external case record.
3. Focus on Case 152. The cases that have a status of escalated are highlighted in the portlet.
4. Explain that any column with a pencil on the column heading means that you can modify the content in that column. For instance, you can change the priority or status. Click on the status of Escalated to show that you can change the status.
5. Go to Case 152 by clicking Edit on the case record in the portlet.

## McGeever CR/ARR OW 2014.2 CRM Lite Demo Script



The screenshot shows the Netsuite CRM interface for a Case record. The title is "152 Invoices aren't printing Altima Technology". The interface is divided into several sections:

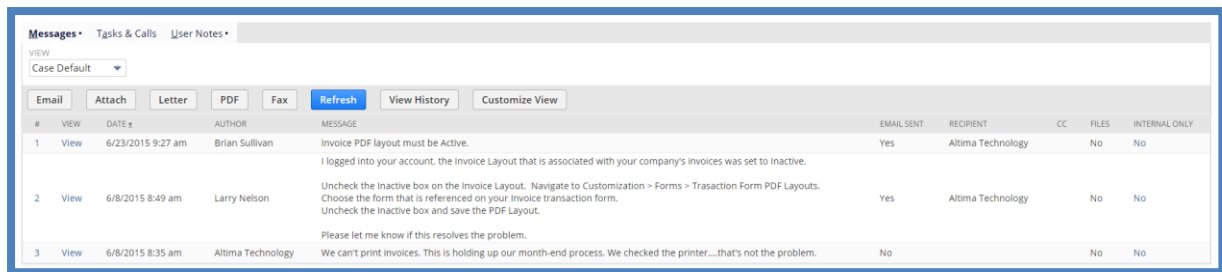
- Primary Information:** Contains fields for Case Number (152), Subject (Invoices aren't printing), Company (Altima Technology), Subsidiary (US - West), Contact, E-MAIL(S) (sic@netsuite.com), Phone (415-230-9600), Profile (US - West), Priority (High), and Form (McGeever Case Form).
- Product Detail:** Contains fields for Product (Enterprise) and Origin (E-mail).
- Progress and Solution Detail:** Contains fields for Status (Escalated), Assigned To (Cathy Collins), Case Type (Problem), and Category (Implementation). There is also a checkbox for "HELP DESK".
- Communication:** A tab at the bottom showing "Incoming from Customer" and "Outgoing from Support Rep". The "Incoming from Customer" section shows a message from the customer: "We can't print invoices. This is holding up our month-end process. We checked the printer....that's not the problem." The "Outgoing from Support Rep" section shows a field for "INSERT SOLUTION" with a search button and a "New Solution" button. Below this is a "REPLY TO CUSTOMER" section with a rich text editor toolbar and a text area.

6. *This is a problem reported by a customer. Show the drop down on the Case Type field in the Progress and Solution Detail section. You can choose from these defaults or add your own types.*
7. *In the Communication tab, you can add communications between your customer and your support reps. There is a great deal of flexibility in the way that communication about cases is handled. You can keep specific employees informed about progress; you can send emails to customers or just to employees; you can insert solutions from your company's knowledgebase into messages to your customer and/or employees.*
8. *If you check the Help Desk box, this means that the case was reported by an employee in your company.*
9. *Mention that you can associate this case with related cases and issues and that support reps can log the time they work on a case through Time Tracking.*
10. *If you need to escalate a case, you can do so and it will be available for searches that can be placed on dashboards for the appropriate people. If we go to to the Escalations tab, we see*

## McGeever CR/ARR OW 2014.2 CRM Lite Demo Script

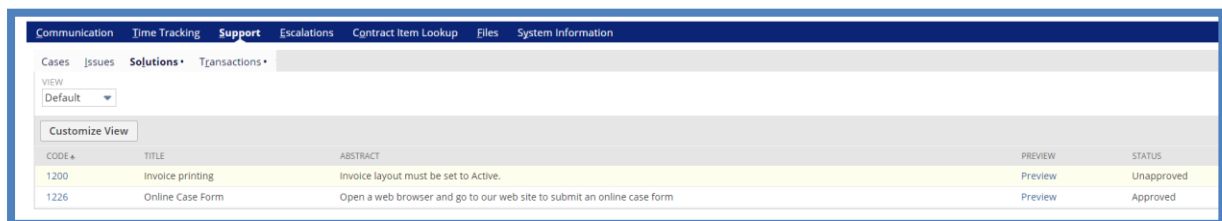
*that this case was escalated. Click on the Escalations tab. You can de-escalate this case now if you know that the problem has been resolved. Otherwise, the appropriate person will de-escalate the case after they resolve the issue.*

- Click on the Communication tab and then the Messages subtab. Here you see messages from the customer and replies from your employees.



#	VIEW	DATE	AUTHOR	MESSAGE	EMAIL SENT	RECIPIENT	CC	FILES	INTERNAL ONLY
1	View	6/23/2015 9:27 am	Brian Sullivan	Invoice PDF layout must be Active. I logged into your account, the Invoice Layout that is associated with your company's invoices was set to Inactive.	Yes	Altima Technology	No	No	No
2	View	6/8/2015 8:49 am	Larry Nelson	Uncheck the Inactive box on the Invoice Layout. Navigate to Customization > Forms > Transaction Form PDF Layouts. Choose the form that is referenced on your Invoice transaction form. Uncheck the Inactive box and save the PDF Layout.	Yes	Altima Technology	No	No	No
3	View	6/8/2015 8:35 am	Altima Technology	Please let me know if this resolves the problem. We can't print invoices. This is holding up our month-end process. We checked the printer....that's not the problem.	No		No	No	No

- Support reps can search for solutions in your company's knowledgebase or create new solutions that will be added to it. These solutions can be either approved or unapproved, and you can tell the system whether or not unapproved solutions can be linked to a support case. To see the solutions that were attached to this case, click the Support tab and Solutions subtab.



CODE	TITLE	ABSTRACT	PREVIEW	STATUS
1200	Invoice printing	Invoice layout must be set to Active.	Preview	Unapproved
1226	Online Case Form	Open a web browser and go to our web site to submit an online case form	Preview	Approved

- Note: This is a new feature in V2014.2 and the attaching to a transaction is not working consistently.** It is safest to only show the example that is seeded here. Also, this field doesn't use any logic to determine what transactions should or shouldn't be associated with a case. You can associate a support case with a transaction. In the Support tab and Transactions subtab, make sure the view is A/R – A/P. You see that a transaction can be associated with a case. If a customer is withholding payment because of an open case, you can attach that invoice to this case form. From this hyperlink, open the invoice in another tab. Open the Related Transactions tab, Support Cases subtab. We see that the support case is cross-referenced with this invoice.

## McGeever CR/ARR OW 2014.2 CRM Lite Demo Script

Communication Time Tracking **Support** Escalations Contract Item Lookup Files System Information

Cases Issues Solutions **Transactions**

BILLING STATUS: Either VIEW: A/R - A/P TRANSACTION TYPE: Sales Order TRAN NO.: <Type then tab>

New Attach Customize View

EDIT	DATE	TYPE	NUMBER	PO/CHECK #	AMOUNT	AMOUNT PAID	AMOUNT REMAINING	TERMS	DUE DATE/RECEIVE BY	DAYS OVERDUE	RMA HEADER START DATE	END USER	CONTRACT	ORDER TYPE
Edit	11/13/2014	Invoice	INV0713		2,050.00	0.00	2,050.00	Net 30	12/15/2014	0		Altima Technology		Contract - New

**Invoice** INV0713 Altima Technology OPEN

Edit Back Accept Payment Actions

**Primary Information**

DATE 11/13/2014	INVOICE # INV0713	DUE DATE 12/15/2014
END USER Altima Technology	APPROVAL STATUS Approved	TERMS Net 30
CUSTOMER Altima Technology		

**Summary**

SUBTOTAL	2,050.00
DISCOUNT	
TAX ITEM	0.00
TOTAL	2,050.00
AMOUNT DUE	2,050.00

**Contract**

ORDER TYPE Contract - New	END DATE	CONTRACT
START DATE	RENEWAL TERMS	FROM CONTRACT
CONTRACT TERM 12		

Items Billing Channel Accounting Contacts Shipping Activities Audit Trail/Workflow Sales Team **Related Transactions**

Payments **Support Cases**

STAGE: All - AWAITING SUPPORT REPLY VIEW: Default SUPPORT CASE:

New Case Attach Customize View

EDIT	SUBJECT	NUMBER	STATUS	LAST MSG. DATE	PRIORITY	ASSIGNED TO	CONTACT	SUPPORT LEVEL	HELP DESK CASE TYPE	REMOVE
Edit	Invoices aren't printing	152	Escalated	6/23/2015 9:27 am	High	Cathy Collins		Platinum		Remove