Last Sales Activity

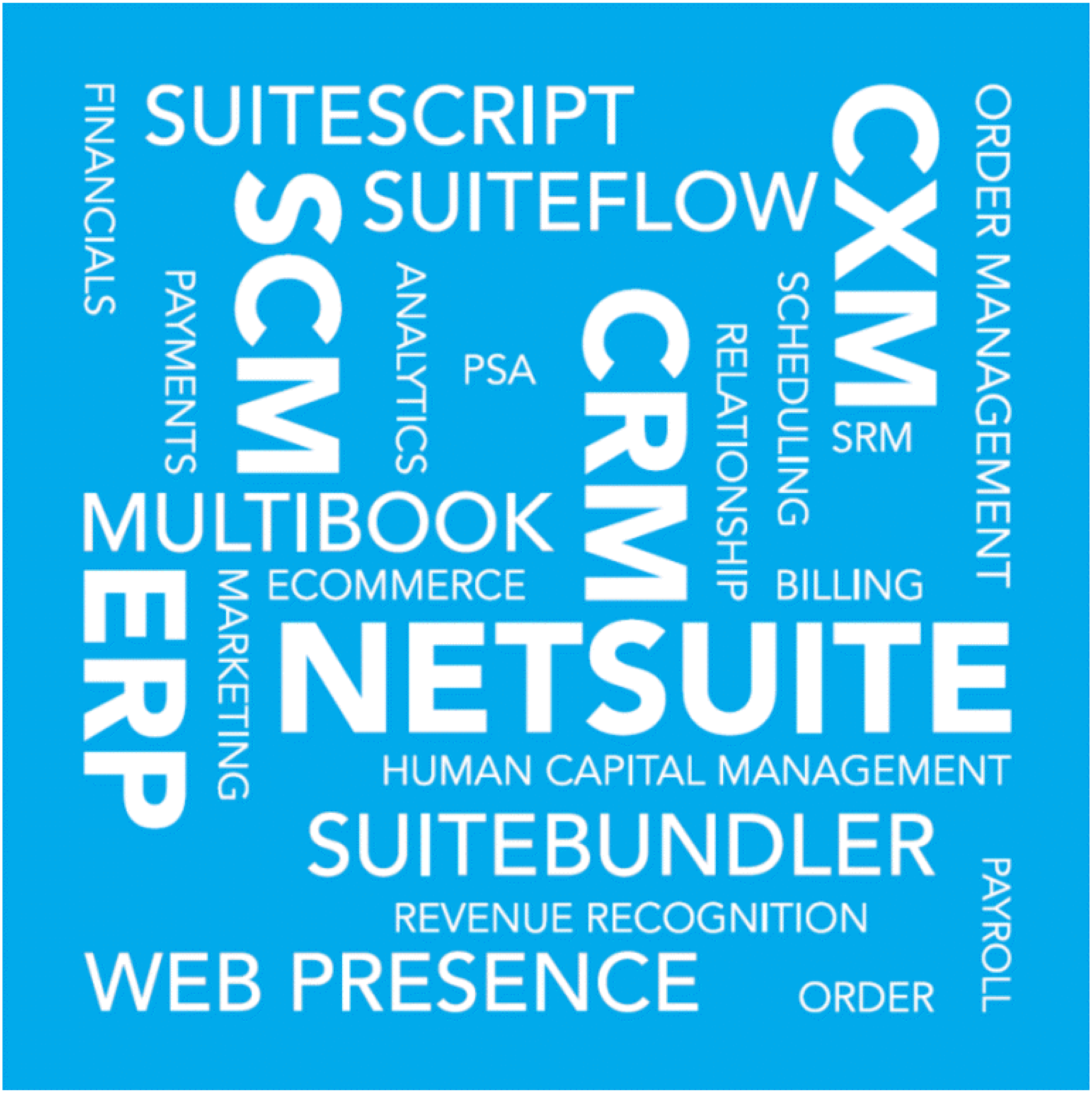

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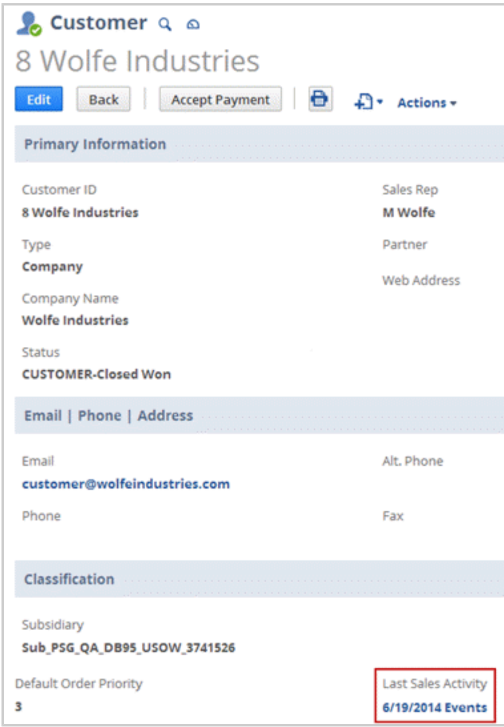
Table of Contents

Last Sales Activity

The Last Sales Activity (LSA) SuiteApp adds a **Last Sales Activity** field on lead, prospect, customer, contact, and opportunity records. The field displays the last date a sales activity updated that record. Click the Last Sales Activity link in the **Last Sales Activity** field to open the record for that activity.



You can also add reminders, key performance indicator portlets, and saved searches to your dashboard. These tools help you determine leads, prospects, contacts, and opportunities with no sales activities in the last week.

Setting Up the Last Sales Activity SuiteApp

Perform these tasks to set up the Last Sales Activity SuiteApp:

- Enabling CRM Features
- Installing the Last Sales Activity SuiteApp
- Setting Last Sales Activity Preferences
- Setting Up the Last Sales Activity Saved Mass Updates

Enabling CRM Features

Ensure that the following CRM features are enabled before you set up Last Sales Activity:

- Customer Relationship Management
- Opportunities
- Marketing Automation

Enable this feature to have the **Last Sales Activity** field track the last marketing campaigns sent to a lead, prospect, customer, or contact. For more information, see the help topic CRM and SFA Features.

Installing the Last Sales Activity SuiteApp

Note: This SuiteApp is currently not available for NetSuite – Japan Edition.

Note: The Last Sales Activity SuiteApp is pre-installed on newly provisioned accounts.

Use the following bundle information to install the Last Sales Activity SuiteApp:

- Bundle Name: Last Sales Activity
- Bundle ID: 53195
- Location: Repository
- Availability: Public

For more information on installing SuiteApps, see the help topic Installing a Bundle.

The Last Sales Activity SuiteApp is a managed bundle and automatically updated whenever there are updates. Issue fixes and enhancements are available after the SuiteApp is updated in your account.

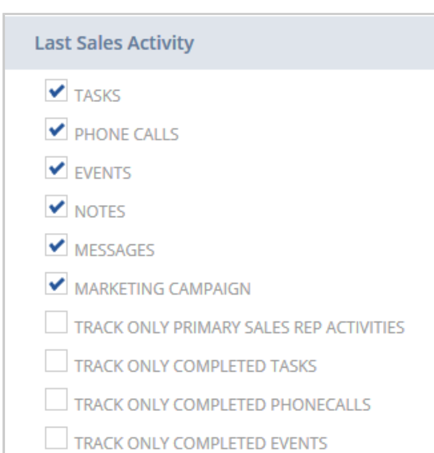
Setting Last Sales Activity Preferences

You must define the specific types of sales activities that you want to track. You can also further narrow down the definition of a sales activity by counting activities with a completed status. You can also count activities performed by the primary sales representative.

Note: The Last Sales Activity SuiteApp tracks sales activities created by or currently assigned to users with a sales role. (You must use the Team Selling feature.) For more information on assigning sales roles with Team Selling, see the help topic Setting Up Team Selling.

The Last Sales Activity SuiteApp also tracks sales activities marked as a sales rep. For more information on marking employees as sales reps, see the help topic Human Resources Information for an Employee.

Note: If employees are set up as a sales rep or have a sales role, Last Sales Activity is tracked when they create the activity. This is true even if they are logged in with a non-sales role.



To configure Last Sales Activity preferences:

1. Go to Setup > Company > General Preferences and then click the **Custom Preferences** subtab.
2. On the Last Sales Activity group, check the boxes next to the sales activities types that you want the SuiteApp to track. You can choose to track marketing campaigns, tasks, phone calls, events, notes, and messages.

Activity	Description	Exceptions
Marketing Campaigns	Created on the **Campaigns** subtab of the customer record or at Lists > Marketing > Marketing Campaigns > New. **Note:** The **Last Sales Activity** field is updated when the marketing campaign emails are sent.	▪ Only activities from customers with one of the of the opt-in statuses update the **Last Sales Activity** field. For more information, see the help topic Subscription Management. ▪ Sales campaigns are not included in determining the last sales activity. ▪ Creation of lead nurturing campaigns are not included in determining the last sales activity. Only marketing emails sent as part of a lead nurturing campaign are included in determining the last sales activity. ▪ Marketing campaigns with **Other Events** update the last sales activity when the marketing campaign record is saved.
Tasks	Created on the **Communication** subtab of a customer record or at Activities > Scheduling > Tasks > New.	
Phone Calls	Created on the **Communication** subtab of a customer record or at Activities > Scheduling > Phone Calls > New.	
Events	Created on the **Communication** subtab of a customer record or at Activities > Scheduling > Events > New.	
Notes	Created on the **Communication** subtab of a customer record.	
Messages	Created on the **Communication** subtab of a customer record.	

3. Check the **Track Only Completed Tasks**, **Track Only Completed Phone Calls**, or **Track Only Completed Events** boxes to include those activities with the completed status.

   > **Note:** To narrow the records to only those with a completed status, you must first check the **Tasks**, **Events**, and **Phone Calls** boxes. The completed preferences will then be available.

4. Check the **Track only Primary Sales Rep Activities** box to configure the SuiteApp to track the sales activities of users designated as Primary Sales Rep.

   The following conditions apply when you use the Track only Primary Sales Rep Activities preference in conjunction with the Team Selling feature. For more information, see the help topic Setting Up Team Selling.

   - The Team Selling feature and the Track Only Primary Sales Rep Activities preference are set to true - The Last Sales Activity SuiteApp tracks only activities from the primary sales rep.
   - The Team Selling feature is set to false and the Track Only Primary Sales Rep Activities preference is set to true - The Last Sales Activity SuiteApp tracks only activities from sales users

assigned as Sales Rep. This assignment appears on lead, prospect, customer, opportunity, and contact records.

- The Team Selling feature is set to true and the Track Only Primary Sales Rep Activities preference is set to false - The Last Sales Activity SuiteApp tracks only the activities of sales users who are members of a sales team.
- The Team Selling feature and the Track Only Primary Sales Rep Activities preference are set to false - The Last Sales Activity SuiteApp tracks all sales activities by users with a sales role. It also tracks users marked as a Sales Rep on lead, prospect, customer, opportunity, and contact records.

> **Note:** Sales activities performed for an opportunity or contact that are not linked to a customer record do not update the **Last Sales Activity** field. Last sales activities performed for opportunities and contacts that are not linked to customer records are tracked. However, both the Team Selling feature and the Track Only Primary Sales Rep Activities preference must be set to false.

> **Note:** All marketing campaigns and user notes activities performed for a contact record do not update the customer record's **Last Sales Activity** field. These activities are tracked only on the specific record's **Last Sales Activity** field.

5. Enter a value in the **Activity Duration Filter (Days)** field to set the number of days to filter processed activities that update Last Sales Activity. For example, to process only those entities with activities created or modified within the past week, set the field to 7. To process activities created or modified within the past month, set the field to 30. To process all entities, leave the field blank.

   The default value is 7 days.
6. Check the **Enable LSA Manual Update** box to show the Update LSA button on record pages. This enables you to manually update the Last Sales Activity field on the record.
7. Click **Save**.

> **Note:** When you assign a new sales rep to a record, the **Last Sales Activity** field automatically clears. This field remains blank until the new sales rep creates an activity that can be tracked. You can retain the last sales activity created by the former sales rep. To do this, ensure that the sales rep remains a member of the sales team until the new sale rep creates a sales activity. When you maintain the same membership, NetSuite ensures continuity of tracked sales activities for the record. (The Team Selling feature is set to true.)

Setting Up the Last Sales Activity Saved Mass Updates

You must save the Last Sales Activity Mass Updates for the schedules to take effect.

> **Note:** You need to perform this procedure only one time after you install the Last Sales Activity SuiteApp.

To save the Last Sales Activity Mass Updates:

1. Go to List > Mass Update > Saved Mass Updates to view the Saved Mass Updates list.
2. Click one of the following Last Sales Activity Mass Updates:
   - **LSA Contact Mass Update**
   - **LSA Customer Mass Update**
   - **LSA Opportunity Mass Update**

3. Click **Save**.
4. Repeat steps 2 to 3 for the other two Last Sales Activity mass updates.

Using the Last Sales Activity SuiteApp

Read the following sections to understand the Last Sales Activity SuiteApp.

The Last Sales Activity Field

You can view the **Last Sales Activity** field on lead, prospect, customer, contact, and opportunity records. The field displays the last sales activity performed for those records. Click the Last Sales Activity link to open the sales activity record.

The date for each sales activity displayed in the **Last Sales Activity** field is determined by whether they were completed.

For activities that were not completed, the following dates display in the **Last Sales Activity** field:

- Task – Start date
- Phone call – Date
- Event – Date
- Note – Date of creation
- Message – Date of creation

For activities that were completed, the following dates display in the **Last Sales Activity** field:

- Task – Date of completion
- Phone call – Date of completion
- Event – Date
- Note – Date of creation
- Message – Date of creation

Click **Update LSA** at the top of the record page to manually refresh the Last Sales Activity field on the record.

Sales Activity Reminders, KPIs, and Saved Searches

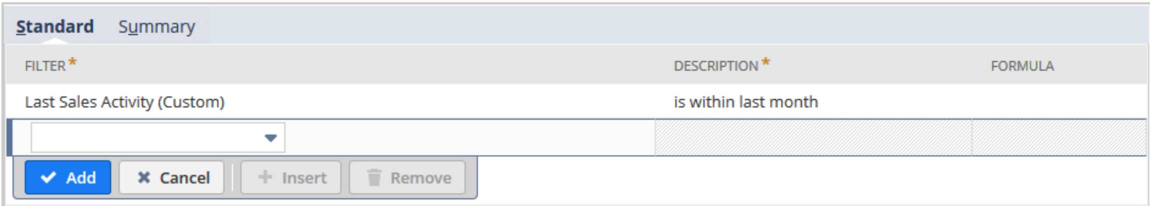
The Last Sales Activity SuiteApp includes the following custom reminders, KPIs, and saved searches. Use these to receive notifications and summaries of leads, prospects, contacts, and opportunities that do not have sales activities for at least a week:

- Contacts Without Sales Activity in the last week
- Leads, Prospects, and Customers Without Sales Activity in the last week
- Opportunities Without Sales Activity in the last week

Set up your dashboard to use the custom reminders and KPIs. For more information, see the help topics Setting Up Reminders and Setting Up the Key Performance Indicators Portlet.

Go to Reports > Saved Searches to access these saved searches. For more information, see the help topic Saved Searches.

Using Last Sales Activity Criteria for Searches



You can search for leads, prospects, customers, contacts, and opportunities based on Last Sales Activity.

You can define a date filter for a search based on a named time period such as last fiscal year. You can also define a date filter based on a custom date range with a specific start date and end date.

To include last sales activity date in a search, on the **Results** subtab of the search page, select Last Sales Activity Fields. In the popup window, select Last Sales Activity in the Last Sales Activity Filter field. Then, set the date criteria.

Last Sales Activity Saved Mass Updates

You can use the following saved mass updates to find contacts, customers, and opportunity records with outdated Last Sales Activity field values. Then you can update them simultaneously:

- LSA Contact Mass Update
- LSA Customer Mass Update
- LSA Opportunity Mass Update

NetSuite automatically schedules the Last Sales Activity mass updates to run daily. However, you can manually run the mass updates to update the **Last Sales Activity** field on contact, customer, and opportunity records. For more information, see the help topic Mass Changes or Updates.