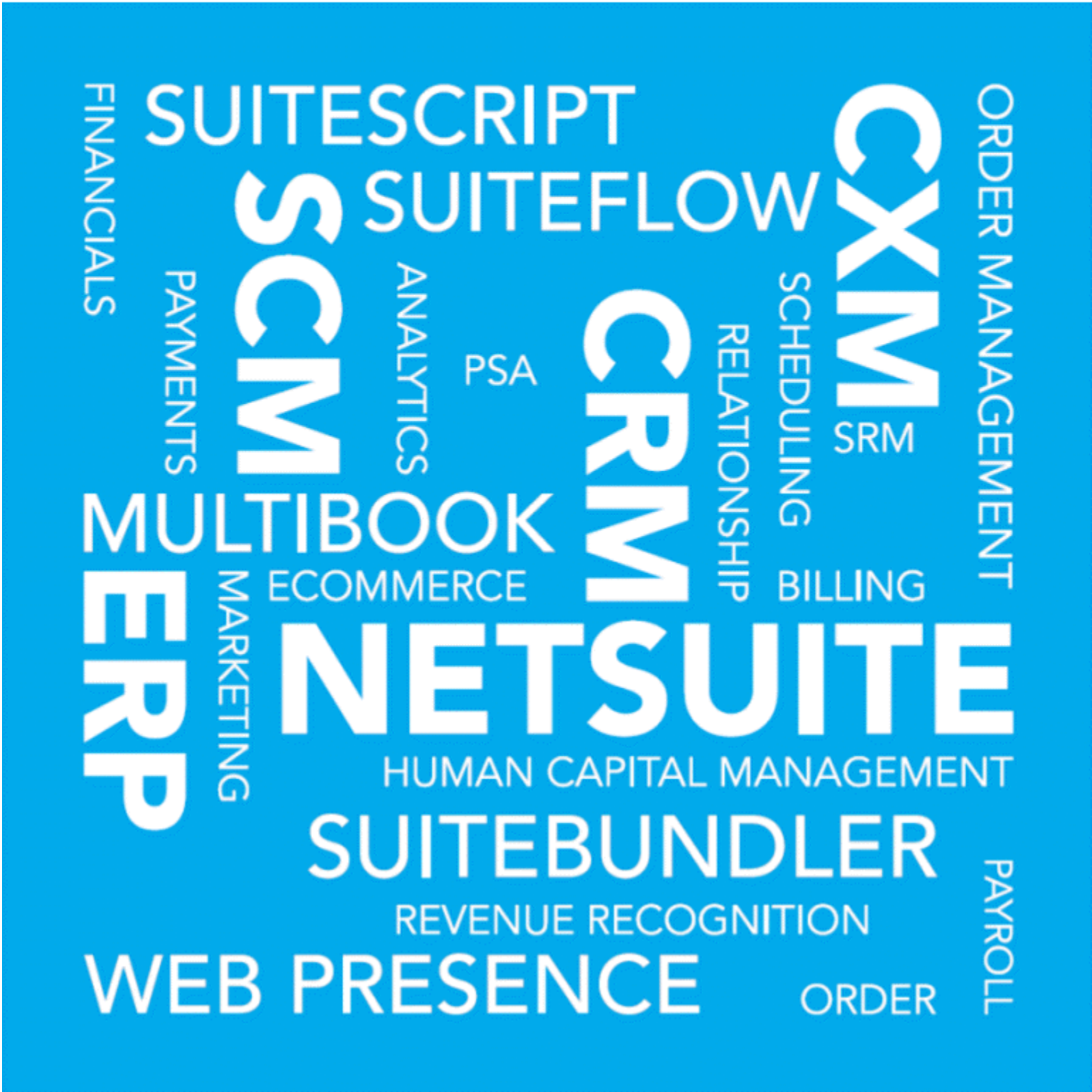


The Enhanced Sales Center SuiteApp



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The Enhanced Sales Center SuiteApp

The Enhanced Sales Center provides user interface enhancements to the standard NetSuite Sales Center. The Enhanced Sales Center makes information that is relevant to sales users available to them through better organized tabs, forms, links, and dashboards.

For more information on the enhancements introduced in the Enhanced Sales Center, see [Sales Center Enhancements](#).

If you are new to NetSuite and you want to find more information about NetSuite's user interface and Standard Centers, see the help topic [Centers Overview](#).

Setting up the Enhanced Sales Center

The following sections provide instruction for setting up the Enhanced Sales Center.

Prerequisites


Before you download and install the SuiteApp, you should ensure that the following features are enabled:

- Customer Relationship Management
- Sales Force Automation

For more information on enabling NetSuite features, see the help topic [Enabling Features](#).

If you do not use the Opportunities and Customer Support and Service features, you must disable the Opportunities and Support tabs. These tabs are located in the Enhanced Sales Center. To delete custom center tabs, go to Customization > Centers and Tabs > Center Tabs. Click Edit next to the center tab that you want to delete. On the Actions list, click Delete.

Installing the Enhanced Sales Center

 **Note:** This SuiteApp can only be installed on NetSuite 2012.1 or higher.

Bundle Name: Enhanced Sales Center

Bundle ID: 19656

Location: Repository

Availability: Public

For more information on installing SuiteApps, see the help topic [Installing a Bundle](#).

For updates to the Enhanced Sales Center, an account administrator or a user with SuiteApp Marketplace permission can update the installed bundle. For more information, see the help topic [Installed Bundle Updates](#).

Sales Center Enhancements

The Enhanced Sales Center includes comprehensive changes to the standard Sales Center user interface. These changes provide a more intuitive and convenient interface specifically designed for sales users.

Click these topics for more details on the Sales Center enhancements:

- [Enhanced Sales Center Roles and Permissions](#)
- [Enhanced Tabs, Categories, and Links](#)
- [Enhanced Sales Forms](#)

- [Enhanced Field Labels and Custom Fields](#)
- [Enhanced Saved Search Forms and Search Results List Views](#)
- [Enhanced Dashboards and Portlets](#)

Enhanced Sales Center Roles and Permissions

The following custom roles are available in the Enhanced Sales Center:

- Sales Admin - Enhanced Sales Center
- Sales Mgr - Enhanced Sales Center
- Sales Rep - Enhanced Sales Center
- Publisher - Enhanced Sales Center

Each custom role includes a set of associated permissions. These permissions determine the data sales users can see and the tasks they can perform in the Enhanced Sales Center. If you are a NetSuite Administrator, you can assign these roles to users, as needed. For more information, see the help topic [Assigning Roles to an Employee](#). The roles in the Enhanced Sales Center are locked, but you can customize them, which creates copies that you can edit. For more information, see the help topic [Customizing or Creating NetSuite Roles](#). You can also compare permissions of the standard NetSuite Sales Center and the Enhanced Sales Center roles before you assign the latter to users. For information on comparing roles and permissions, see the help topic [Showing Role Permission Differences](#).

Enhanced Tabs, Categories, and Links

When you access the Enhanced Sales Center roles for the first time, a default set of tabs display. The Enhanced Sales Center includes the standard tabs found in the standard Sales Center. It also includes tabs for the Calendar, Leads & Prospects, Contacts, and Items. The More tab contains the least used links. The default Enhanced Sales Center tabs may vary depending on the role in use.

The Leads & Prospects, Opportunities, Customers, Contacts, Forecasts, and Items tabs include three basic categories: Overview, Reports, and Tools. The links under each category include only information that is most useful to a particular sales role.

You can disable list menus on tabs and categories. For information, see [Setting Up Appearance Preferences](#).

Enhanced Sales Forms

Note: If you are a NetSuite Administrator, ensure that you upgrade your account with the latest form layout enhancements. When you update your account you take advantage of the Enhanced Sales Center field groups, subtabs, and sublists. For more information about the latest form layout enhancements, see Version 2010 Release 2 User Interface Overview. For information about deploying the form layout enhancements, see the help topic [Deploying Upgraded Forms](#).

The default leads, prospects, opportunities, customers, and partners forms display all information in two columns.

The subtabs on sales forms show sections instead of tabs to limit the number of clicks required to get to a specific field or information.

Note: You should set the **Expand Tabs on Entry Forms** preference to Yes to activate this enhancement. For more information, see [Setting Up Appearance Preferences](#).

The forms in the Enhanced Sales Center are locked, but you can customize them, which creates copies that you can edit. You can place your custom fields anywhere in the custom form. You can also customize

the roles provided by the SuiteApp to control access to your customized form. For more information, see the help topic [Custom Forms](#).

Enhanced Field Labels and Custom Fields

Fields on records are renamed to more closely follow typical industry terminology. The following custom fields, which are commonly used in other popular CRM applications, are also included:

- Annual Revenue
- Campaign Category
- Created Date
- Industry
- Last Modified Date
- No. of Employees

The following tables list the fields on the Enhanced Sales Center and their counterpart fields on the standard Sales Center. It also provides the equivalent fields used in other popular CRM applications.

Field Labels on Customer and Prospect Records			
Enhanced Sales Center	Standard Sales Center	Fields used in other popular CRM applications	Search Fields to Use
Sales Rep		Account Owner	
Customer ID / Prospect ID	Name/ID		Name/ID
Customer Name		Account Name	
Parent Customer		Parent Account	
Phone		Phone	
Email		Email	
Fax		Fax	
Website	Web Address	Website	Web Address
	Category	Type	Category
Industry		Industry	
No. of Employees		Employees	
Annual Revenue		Annual Revenue	
Campaign	Marketing > Lead Source		Lead Source
Description	Comments	Description	Comments
Created Date	Date Created	Created By	Date Created
Last Modified Date		Last Modified By	

Field Labels on Lead Records			
Enhanced Sales Center	Standard Sales Center	Fields used in other popular CRM applications	Search Fields to Use
Sales Rep	Sales Rep	Lead Owner	
Lead ID	Name/ID		
Name		Name	
 Note: The Lead Conversion feature must be enabled in your account for the Name field to appear on a new Lead form.			
Company		Company	
Title		Title	
Lead Status	Status	Lead Status	Status
Phone	Phone	Phone	Phone
Mobile Phone	Mobile Phone		
Email	Email	Email	Email
Rating	Qualification > Sales Readiness	Rating	Sales Readiness
Address	Address	Address	Address
Website (not available for individuals)	Web Address	Website	Web Address
Industry		Industry	
No. of Employees		No. of Employees	
Annual Revenue		Annual Revenue	
Description	Comments	Description	
Campaign	Marketing>Lead Source	Lead Source	Lead Source
Created Date	Date Created		Date Created
Last Modified Date			

Field Labels on Contacts			
Enhanced Sales Center	Standard Sales Center	Fields used in other popular CRM applications	Search Fields to Use
		Contact Owner	
Contact ID	Contact		
Customer Name	Company	Account Name	Company
Title	Job Title	Title	Job Title

Field Labels on Contacts			
Enhanced Sales Center	Standard Sales Center	Fields used in other popular CRM applications	Search Fields to Use
Phone	Main Phone	Phone	Phone
Mobile Phone	Mobile Phone	Mobile	
Email	Email	Email	Email
Reports To	Relationships > Supervisor	Reports To	
Mailing Address	Address	Mailing Address	Address
Fax	Fax		Fax
Other Phone			
Assistant			
Asst. Phone			
Description	Comments	Description	Comments
Created Date	Date Created	Created Date	Date Created
Last Modified Date			

Field Labels on Opportunity Records			
Enhanced Sales Center	Standard Sales Center	Fields used in other popular CRM applications	Search Fields to Use
Sales Rep		Opportunity Owner	
Opportunity Number	Opportunity #		Number/ID
Opportunity Name	Title	Opportunity Name	Title
Customer Name	Company	Account Name	Prospect/Customer
Forecast Type	Forecast Type	Type	Forecast Type
Campaign		Primary Campaign Source	
Expected Close Date	Expected Close	Close Date	Expected Close Date
Actual Close			
Stage	Status	Stage	Opportunity Status
Probability (%)	Probability	Probability (%)	Probability
Amount	Projected Total	Amount	Projected Amount
Range	Range		Range - High, Range - Low
Next Step	Action Item	Next Step	Action Item
Rating	Sales > Sales Readiness		Sales Readiness

Field Labels on Opportunity Records			
Enhanced Sales Center	Standard Sales Center	Fields used in other popular CRM applications	Search Fields to Use
Campaign Category			
Campaign	Lead Source	Primary Campaign Source	Lead Source
Description	Details	Description	
Created Date		Created By	
Days Open			
Last Modified Date		Last Modified By	

Enhanced Saved Search Forms and Search Results List Views

The Enhanced Sales Center includes saved searches. You can use them as the default search forms and results list view when you search for the following record types:

- Activity
- Contact
- Customer
- Document
- Event
- Group
- Item
- Opportunity
- Phone Call
- Task
- Transaction

The standard Sales Center, by default, uses a search form with system-defined set of fields that you can use as search filters.

Opportunity Search List Search

☐ Use Advanced Search

<p>Prospect/Customer</p> <p>any of <input type="text"/></p> <p>- None -</p> <p>1 ACME Industries</p> <p>11 ACME Industries : Whiz Inc.</p> <p>2 ACME Corporation</p>	<p>Item</p> <p>any of <input type="text"/></p> <p>- None -</p> <p>Airborne</p> <p>Billable Expense Markup</p> <p>Billable Group</p>
<p>Title</p> <p>any <input type="text"/></p>	<p>Number</p> <p>any <input type="text"/></p>
<p>Projected Amount</p> <p>any <input type="text"/></p>	<p>Value</p> <p><input type="text"/></p>
<p>Value</p> <p><input type="text"/></p>	<p>Document Status</p> <p>any of <input type="text"/></p> <p>In Progress</p> <p>Issued Estimate</p> <p>Closed - Won</p> <p>Closed - Lost</p>
<p>Range - High</p> <p>any <input type="text"/></p>	<p>Line Item</p> <p>any of <input type="text"/></p> <p>- None -</p> <p>Airborne</p> <p>Billable Expense Markup</p> <p>Billable Group</p>
<p>Value</p> <p><input type="text"/></p>	<p>Line Amount</p> <p>any <input type="text"/></p>
<p>Range - Low</p> <p>any <input type="text"/></p>	<p>Value</p> <p><input type="text"/></p>
<p>Value</p> <p><input type="text"/></p>	<p>Expected Close Date</p> <p>within <input type="text"/> All <input type="text"/></p>
<p>Range - High (Foreign Currency)</p> <p>any <input type="text"/></p>	<p>From <input type="text"/> To <input type="text"/></p>
<p>Value</p> <p><input type="text"/></p>	<p>Probability</p> <p>any <input type="text"/></p>
<p>Range - Low (Foreign Currency)</p> <p>any <input type="text"/></p>	<p>Value</p> <p><input type="text"/></p>
<p>Value</p> <p><input type="text"/></p>	
<p>Period</p> <p><input type="text"/> <input type="text"/></p>	
<p>Tax Period</p> <p><input type="text"/> <input type="text"/></p>	
<p>Date</p> <p>within <input type="text"/> All <input type="text"/></p>	
<p>From <input type="text"/> To <input type="text"/></p>	

The Enhanced Sales Center saved search forms include only search filters that are commonly used by sales persons when they search for sales records.

Global and quick search results for the above records will use the saved search list view that is included in the SuiteApp.

For more information on setting the default search forms and results list view, see the help topic [Set Search Defaults](#).

For general information about views, see the help topic [Working with List Views, Sublist Views, and Dashboard Views](#).

Enhanced Dashboards and Portlets

The links portlets are streamlined to include only links that sales users are most likely to access.

The following new saved searches are set as the default dashboard views on their corresponding center tabs:

- My Tasks
- My Phone Calls
- My Leads
- My Prospects
- My Opportunities
- My Customers
- My Contacts,

For general information about views, see the help topic [Working with List Views, Sublist Views, and Dashboard Views](#).


The Setup tab contains a links portlet with links for Sales & Marketing Automation, Customization, User/Roles, Import/Export in place of the standard NetSuite Setup Manager.

The More tab contains a links portlet with links to least used sales information.

Customizing the Enhanced Sales Center

If you are new to NetSuite, you should familiarize yourself with the following concepts before you customize the Enhanced Sales Center:

- [Assigning Roles to an Employee](#)
- [Dashboard Personalization](#)
- [Publishing Dashboards Overview](#)

 **Note:** Ensure that you assign Enhanced Sales Center roles to administrator users before you perform the following configuration tasks.

Setting Up Appearance Preferences

You should set up the following appearance preferences for each Enhanced Sales Center role to take advantage of the user interface enhancements.

To set up appearance preferences:

1. Go to Home > Set Preferences.
2. Click the Appearance tab and select the following values for the following fields:

Preference	Setting
Color Theme	Custom: New Sales Color Theme
Screen Font	Arial
Limit Entry Forms to Two Columns	Yes
Expand Tabs on Entry Forms	Yes

3. Click **Save**.

Duplicating Custom Center Tabs

If you added custom center tabs to your sales center, you can make copies of these tabs to add to the Enhanced Sales Center. For more information, see the help topic [Creating Center Tabs](#).

To duplicate a center tab:

1. Go to Customization > Centers and Tabs > Center Tabs.
2. Click **Edit** next to the name of the custom tab that you want to duplicate. The Custom Center tab form is displayed.
3. In the **Center** field, change the selection from **Classic Center** to **Enhanced Sales Center**.
4. Under the **Save** button, click **Save a Copy**.

Recreating Custom Categories

If you created custom categories in the standard Sales Center that you want to use in the Enhanced Sales Center, you must recreate them. You cannot edit the custom categories that you added to tabs

on the standard Sales Center. To create custom categories in the Enhanced Sales Center, go to Setup > Customization > Center Categories > New. Enter the values to the Custom Center Category fields. For information on how to create Custom Categories, see the help topic [Creating Center Categories](#).

Adding Custom Center Links

Center links take users to other pages within NetSuite, custom records, Suitelets, or external websites. You can add previously used links in the standard Sales Center categories to the Enhanced Sales Center categories.

To add center links:

1. Log in to NetSuite using the Enhanced Sales Center - Publisher role.
2. Click the tab you want to add the link to.
3. On the upper-right corner, below the tabs, click **Edit Custom Tab**.
4. Click **Save**.
5. If you are prompted to submit an unchanged record, click **OK**.
6. Click **Edit** next to the center category you want to add the link to.
7. Add the links that you previously used in the standard Sales Center.
8. Click **Save**.

For more information, see the help topic [Creating Center Links](#).