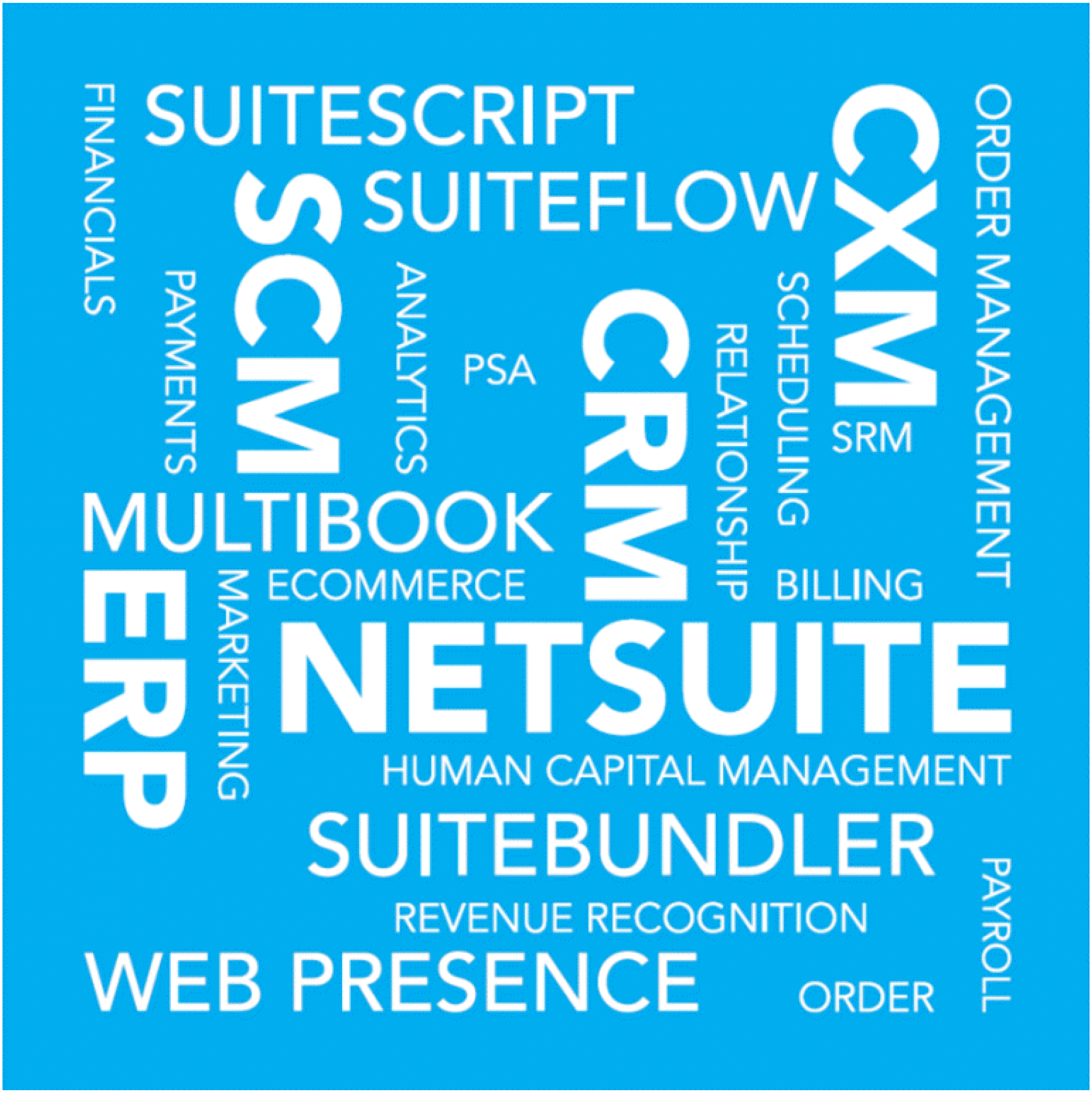
The Enhanced Sales Center SuiteApp



February 28, 2018 2018.1

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Sample Code

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and "as available", for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

No Excessive Use of the Service

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

Beta Features

Oracle may make available to Customer certain features that are labeled "beta" that are not yet generally available. To use such features, Customer acknowledges and agrees that such beta features are subject to the terms and conditions accepted by Customer upon activation of the feature, or in the absence of such terms, subject to the limitations for the feature described in the User Guide and as follows: The beta feature is a prototype or beta version only and is not error or bug free and Customer agrees that it will use the beta feature carefully and will not use it in any way which might result in any loss, corruption or unauthorized access of or to its or any third party's property or information. Customer must promptly report to Oracle any defects, errors or other problems in beta features to support@netsuite.com or other designated contact for the specific beta feature. Oracle cannot guarantee the continued availability of such beta features and may substantially modify or cease providing such beta features without entitling Customer to any refund, credit, or other compensation. Oracle makes no representations or warranties regarding functionality or use of beta features and Oracle shall have no liability for any lost data, incomplete data, re-run time, inaccurate input, work delay, lost profits or adverse effect on the performance of the Service resulting from the use of beta features. Oracle's standard service levels, warranties and related commitments regarding the Service shall not apply to beta features and they may not be fully supported by Oracle's customer support. These limitations and exclusions shall apply until the date that Oracle at its sole option makes a beta feature generally available to its customers and partners as part of the Service without a "beta" label.

Table of Contents

The Enhanced Sales Center SuiteApp

The Enhanced Sales Center 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 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 sections below provide instruction on setting up the Enhanced Sales Center.

Prerequisites

Before you download and install the SuiteApp you need to 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 are not using the Opportunities and Customer Support and Service features, you need to disable the Opportunities and Support tabs, respectively, from 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 Version 2012 Release 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 SuiteBundler 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

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

- Sales Admin - Enhanced Sales Ctr
- Sales Mgr - Enhanced Sales Ctr
- Sales Rep - Enhanced Sales Ctr
- Publisher - Enhanced Sales Ctr

Each custom role includes a set of associated permissions that 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, creating 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 assigning the later 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 are displayed. In addition to the standard tabs found in the standard Sales Center, the Enhanced Sales Center includes tabs for the Calendar, Leads & Prospects, Contacts, and Items. A More tab is also added where the least used links are placed. The default Enhanced Sales Center tabs may vary depending on the role being used.

The Leads & Prospects, Opportunities, Customers, Contacts, Forecasts, and Items tabs are streamlined to include only 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 should disable the tab list. You can click a tab to access the categories and links. For more information on turning off the list menus on tabs and categories, see Setting Up Appearance Preferences.

Enhanced Sales Forms

> **Note:** If you are a NetSuite Administrator, make sure that you have upgraded your account with the latest form layout enhancements. You need to update your account to the enhanced forms to 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 are expanded to show sections instead of tabs to limit the number of clicks required to get to a specific field or information.

> **Note:** You need to change the Expand Tabs on Entry Forms preference to Yes for this enhancement to be activated. For more information, see Setting Up Appearance Preferences.

The forms in the Enhanced Sales Center are locked, but you can customize them, creating copies that you can edit. You can place your custom fields anywhere in the custom form and 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, their counterpart fields on the standard Sales Center, and 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

Field Labels on Customer and Prospect Records			
Enhanced Sales Center	**Standard Sales Center**	**Fields used in other popular CRM applications**	**Search Fields to Use**
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 **Note:** The Lead Conversion feature must be enabled in your account for the Name field to appear on a new Lead form.		Name	
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
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

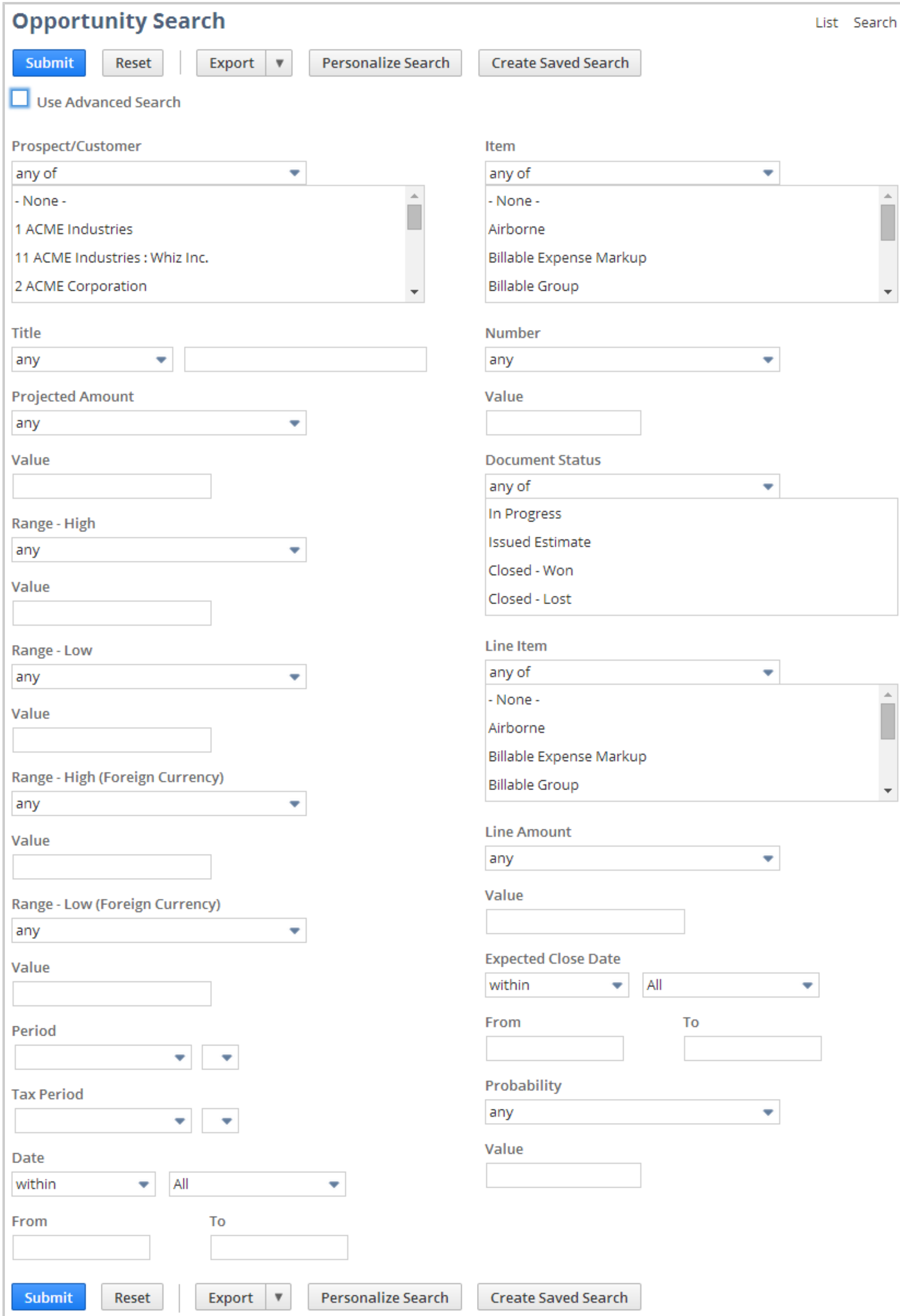
Field Labels on Opportunity Records			
Enhanced Sales Center	**Standard Sales Center**	**Fields used in other popular CRM applications**	**Search Fields to Use**
Next Step	Action Item	Next Step	Action Item
Rating	Sales > Sales Readiness		Sales Readiness
Campaign Category			
Campaign	Lead Source	Primary 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

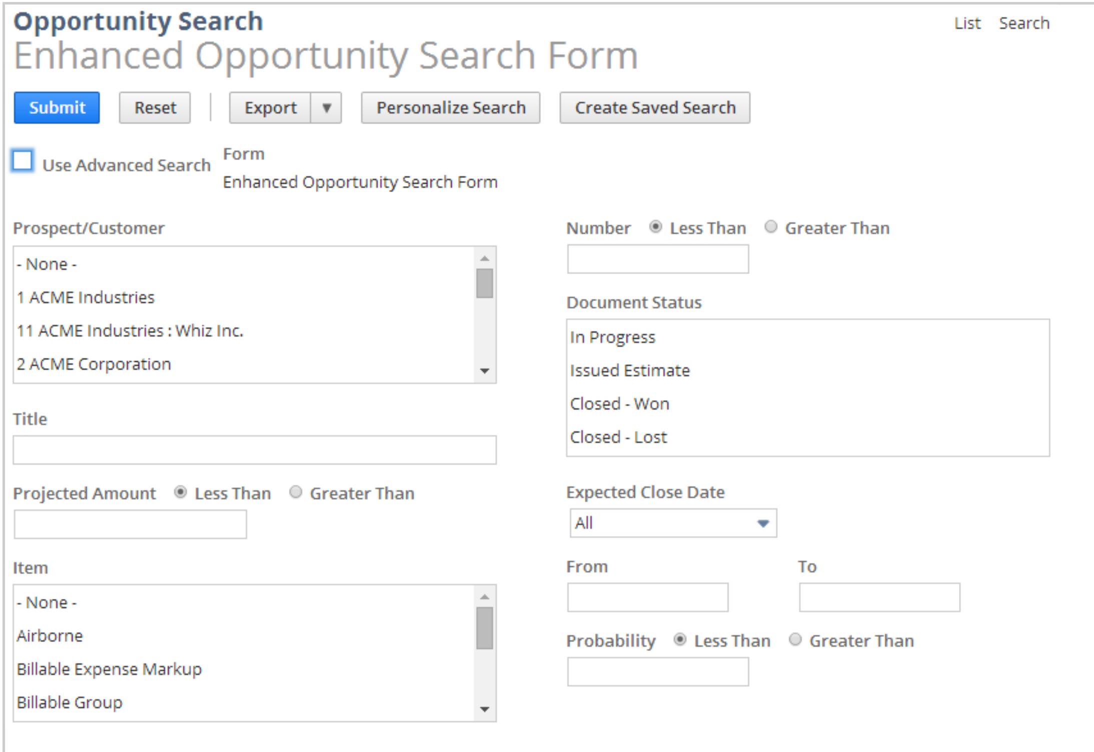
The Enhanced Sales Center includes saved searches that you can use as the default search forms and results list view when searching for the following types of records:

- 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 can be used as search filters.



The Enhanced Sales Center saved search forms include only search filters that are commonly used by sales persons when searching 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 need to familiarize yourself with the following concepts before performing any customization to the Enhanced Sales Center:

- Assigning Roles to an Employee
- Dashboard Personalization
- Publishing Dashboards Overview

> **Note:** Make sure that you have assigned Enhanced Sales Center roles to Admin users before performing 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 in the Enhanced Sales Center.

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 have 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 dropdown, select **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 create them again. You cannot edit the custom categories that you added to tabs on the standard Sales Center and duplicate them for use in the Enhanced Sales Center. To create custom categories, go to Setup > Customization > Center Categories > New, and then 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 takes users to other pages within NetSuite, custom records, Suitelets, or external websites. You can add links previously used 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.