Last Sales Activity

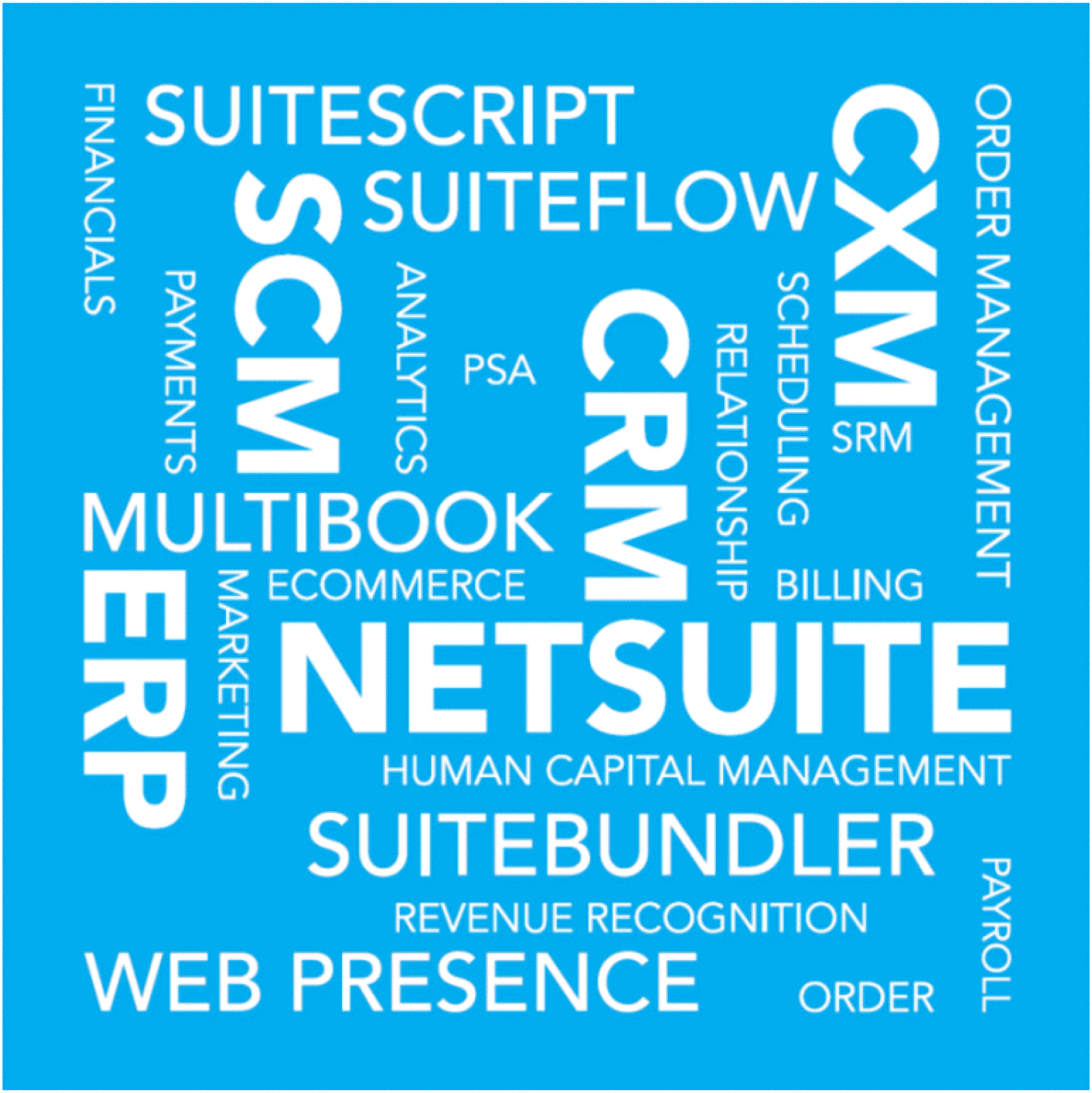

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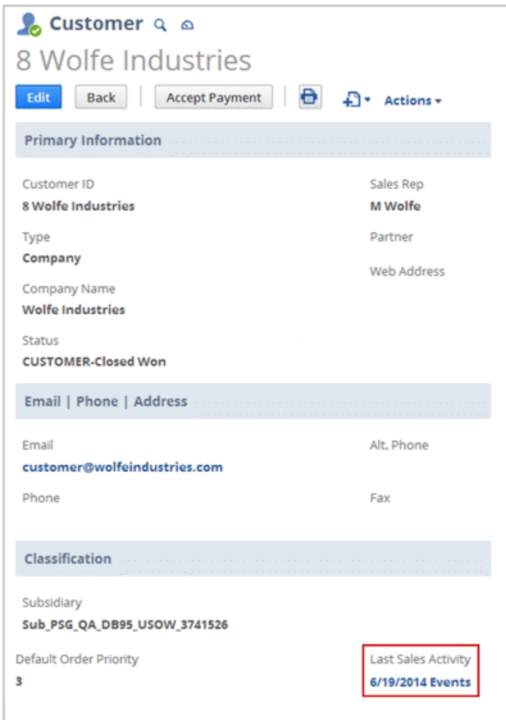
Table of Contents

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 date a sales activity was last performed for 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 to determine leads, prospects, contacts, and opportunities that have not had any sales activities in the last week.

Setting Up the Last Sales Activity SuiteApp

Setting Up the Last Sales Activity SuiteApp involves the following tasks:

- 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 setting up Last Sales Activity:

- Customer Relationship Management
- Opportunities
- Marketing Automation (Enable this feature if you want the **Last Sales Activity** field to 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:** You do not need to install the Last Sales Activity SuiteApp to new NetSuite accounts. This 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.

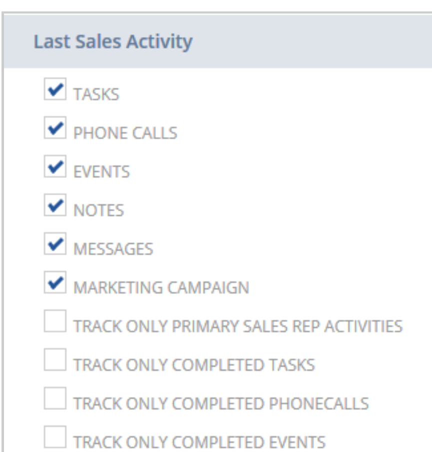
The Last Sales Activity SuiteApp is a managed bundle and automatically updated whenever there are updates. These issue fixes and enhancements are available after the SuiteApp is updated in your account.

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 only counting activities with a completed status or only activities performed by the primary sales representative.

> **Note:** Only sales activities created by or currently assigned to users with a sales role (if you use the Team Selling feature) or is marked as a sales rep are tracked by the Last Sales Activity SuiteApp. For more information on marking employees as sales reps, see the help topic Entering Employee Human Resources Information. For more information on assigning sales roles with Team Selling, see the help topic Setting Up Team Selling.

> **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, 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 click the **Custom Preferences** subtab.

2. On the Last Sales Activity group, check the boxes next to the types of sales activities that you want the Last Sales Activity 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 only 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 become available.

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

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

- When both the Team Selling feature and the Track Only Primary Sales Rep Activities preference are enabled, only activities from the member of the sales team marked as the primary sales rep will be tracked by the Last Sales Activity SuiteApp.
- When the Team Selling feature is disabled and the Track Only Primary Sales Rep Activities preference is enabled, only activities from sales users assigned as Sales Rep on lead, prospect, customer, opportunity, and contact records will be tracked by the Last Sales Activity SuiteApp.
- When the Team Selling feature is enabled and the Track Only Primary Sales Rep Activities preference is disabled, only the activities of sales users who are members of a sales team will be tracked by the Last Sales Activity SuiteApp.
- When both the Team Selling feature and the Track Only Primary Sales Rep Activities preference are disabled, all sales activities by users with a sales role or users marked as a Sales Rep on lead, prospect, customer, opportunity, and contact records will be tracked by the Last Sales Activity SuiteApp.

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

> **Note:** All marketing campaigns and user notes activities performed for a contact record will not update the customer record's **Last Sales Activity** field. These activities will be 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 activities processed when updating 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 is automatically cleared. This field remains blank until the new sales rep creates an activity that can be tracked. To retain the last sales activity created by the former sales rep, ensure that the sales rep remains a member of the same sales team until the new sale rep creates a new sales activity. Maintaining the same membership ensures the continuity of tracking sales activities for the record when the Team Selling feature is enabled.

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 installing the Last Sales Activity SuiteApp.

To save the Last Sales Activity Mass Updates:

1. Go to List > Mass Update > Saved Mass Updates. The Saved Mass Updates list is displayed.

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 sales activity that was last 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 or not.

For activities that were not completed, the following dates are displayed 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 are displayed 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

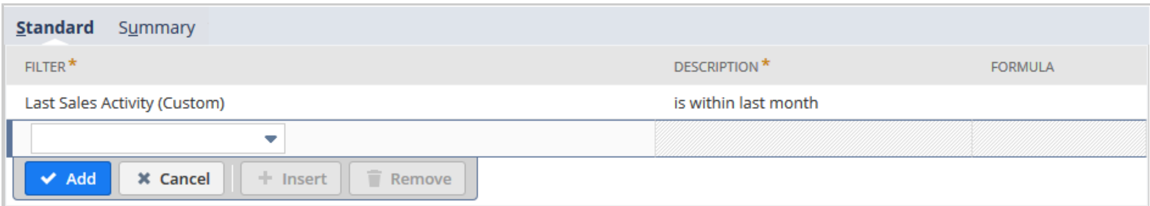
The Last Sales Activity SuiteApp includes the following custom reminders, KPIs, and saved searches that you can use to receive notifications and summaries of leads, prospects, contacts, and opportunities that do not have sales activities for at least a week:

- 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, or 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, select Last Sales Activity in the Last Sales Activity Filter field and 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 and update them simultaneously:

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

The Last Sales Activity mass updates are scheduled to automatically run daily. Alternatively, 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.