Sales Force Automation

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Sales Force Automation Overview

As a sales manager, NetSuite's integrated sales features give you power, flexibility, and convenience in managing your sales team.

You no longer have to juggle separate applications for commission, forecast reporting and contact management. Everything you need is included in NetSuite's integrated SFA and accounting features, saving you the time you would spend exporting data between applications.

NetSuite manages each stage of your selling process from lead generation to lead assignment, from opportunity to order.
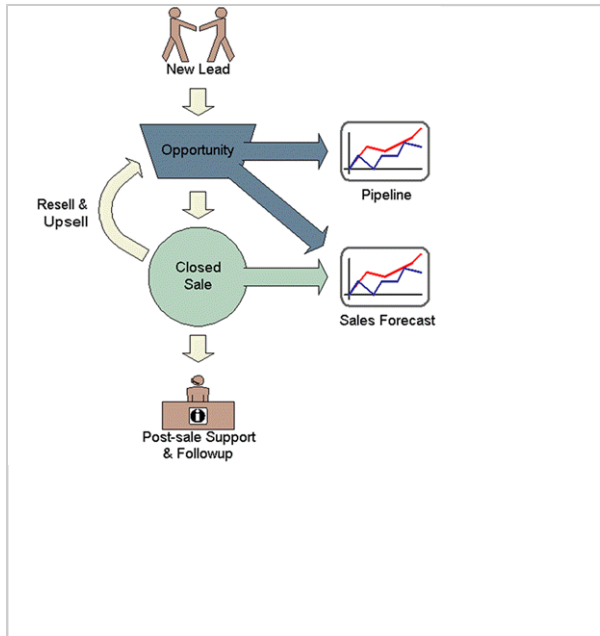
NetSuite's forecast and pipeline tools are unmatched by other software applications, since actual closed sales are included. With Search, customizable reports and KPIs on your dashboard, you will have the knowledge you need to fine tune your selling strategies month after month.

This provides detailed instructions to set up your sales team in NetSuite, including automated lead assignment, forecast, and pipeline management, as well as paying commission to your sales reps.

Managing Your Sales Team

NetSuite's SFA includes all the tools you need to efficiently manage your sales teams.

First, create sales teams to represent the groups of employees that work to make sales. Then, set up automatic lead routing so that new leads and customers are assigned to your reps.

Before your reps start making sales, you can use NetSuite to establish quotas for individual sales reps and managers. Since NetSuite records actual closed sales, you can accurately report on whether your sales reps meet quota from month to month.

Setting Up Sales Teams

The first step in managing sales with NetSuite is to set up your sales teams.

With the Team Selling feature, you can attribute sales transactions to sales teams made up of groups of employees. Each member of a sales team has a sales role that describes their work in making sales. For example, in addition to sales reps, a sales team might have sales engineers that answer technical questions about the products and services you offer.

By entering a contribution percentage for each team member, you can determine the percentage of each deal that is applied towards the quotas and forecasts of reps on the team. Contribution percentages also determine the amount of the deal that is used to calculate commission.

For more information, see Team Selling.

Setting Up Lead Management

NetSuite provides two workflows for the conversion of leads to prospects and then to customers. One workflow enables you to convert leads by changing their status or by entering transactions for them. The second workflow requires the Lead Conversion feature and is best suited for sales organizations that work deals through individuals that are associated with companies.

For more information, see the help topic Lead Management Overview.

NetSuite's automated lead routing lets you distribute leads evenly among your sales reps according to your rules and territories. Defining sales territories lets you channel new leads to the sales reps that are best able to convert them. When leads come in, whether from lists or from your Web site, they are automatically assigned to your sales reps.

For more information, see Sales Territories.

Setting Quotas

Before your team starts selling, you should also set quotas for your reps.

As opportunities are converted to orders, sales managers can monitor how closely sales reps are to meeting quota. The NetSuite quota management feature lets you set quotas categorized by item, class or department.

For more information, see Establishing a Quota.

Measuring Your Success

For a sales manager, the bottom line is whether or not your team meets its quota. NetSuite SFA provides sales managers with the tools necessary to monitor sales numbers during a period allowing you to make timely and effective adjustments.

In NetSuite, you can use opportunities to track your sales. Anyone viewing an opportunity can see the items involved in a deal as well as view a record of all communication regarding the deal.

Opportunities also add another level to your sales process by permitting your sales reps to associate multiple estimates with a single deal while still maintaining accurate forecast and pipeline totals.

NetSuite forecast and pipeline analytics provide up-to-the-minute sales figures so you can make informed decisions about your sales initiatives in time to make quota.

For more information, see Sales Forecasting.

Managing Deals

It is essential for a sales manager to know early in the sales period what needs to be done to meet quota. One of the most useful metrics in managing future sales is the pipeline. In NetSuite, your pipeline amount is equal to the total value of open estimates and opportunities.

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Sales reps track deals they negotiate with prospects by attaching tasks, meetings, phone calls, and contacts directly on the opportunity they are working on. You can get a detailed look at the steps your reps are taking to close specific deals right from the opportunity record.

For more information, see Opportunities and Estimates.

Pipeline Analysis

NetSuite provides all the tools you need to track and manage deals in the pipeline, which helps you maximize the deals you close.

With reports, KPIs, snapshots, and search, you can view information on open estimates and opportunities. This information helps you and your sales reps make the informed decisions that close deals.

For more information, see Pipeline Reports and KPIs.

Forecasting Your Success

At any point during the sales period, it is crucial that you are able to predict your final numbers so you can maintain or adjust your selling strategy.

With NetSuite, you can produce aggregated forecast reports across sales territories and teams that also include actuals and provide accurate, real-time visibility.

For more information, see Sales Forecasting.

Rewarding Your Team

Sales reps are motivated by the commission they can earn on sales. NetSuite sales compensation feature gives you the power and flexibility to award commission based on total sales, quota, profitability, and more. Each sales rep can view the commission they have earned in real time on their personal dashboards, driving them to sell.

If you use NetSuite's payroll feature, you can also pay commission on sales reps' paychecks, letting you manage each step of your sales compensation program.

For more information, see Commissions.

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Setting Up SFA

As a sales manager, the less time you spend keying data, the more time you have to analyze and evaluate your selling process. The automated lead routing feature does that. All new leads and customers are automatically assigned to the appropriate sales rep's leads or customers list.

The first step in the process is to create sales teams. Sales teams are made up of reps and other employees that have a role in closing deals.

Before your team begins selling with NetSuite, you can set up the rules and territories that determine how leads are distributed among your sales reps. You also establish the sales quotas that your reps must meet.

To begin managing your sales force with NetSuite, complete the following tasks:

1. Set up the Team Selling feature.
2. Define Sales Rules and Sales Territories.
3. Set quotas for your sales reps.

   For more information, see Establishing a Quota.

Team Selling

The Team Selling feature lets you associate sales transactions and customers with sales teams comprised of various employees. In addition to sales reps and managers, sales teams can include engineers, account managers and other employees that aid in the sales process.

You can use sales territories to route new leads, prospects, and customers to sales teams for assignment. For more information, see Sales Territories.

To turn on the Team Selling feature, go to Setup > Company > Enable Features > CRM. Check the Team Selling box, and click Save.

When you turn on Team Selling:

- The Sales Rep field on sales transactions and on customer records is replaced with a Sales Team subtab.
- The Sales Rep box on employee records is replaced by a Sales Role field.
- Existing employees marked as sales reps are assigned the Sales Rep sales role.
- A Select Sales Team Members option is added to the Create Group page.
- The Sales by Sales Team Summary and Detail and the Sales Orders by Sales Team Summary and Detail reports are available.
- Sales reports that organize data by sales rep are grouped by sales team by default.

In addition, enabling the Team Selling feature affects existing transactions and customers in the following ways:

- If an existing customer or sales transaction is associated with a single sales rep, that rep is chosen on the Sales Team subtab for the customer or transaction. This rep is marked as the primary sales rep.
- If an existing customer or sales transaction is associated with a sales group created prior to enabling Team Selling, the members of that sales group are selected on the Sales Team subtab. No primary rep is indicated.

If you later stop using the Team Selling feature, NetSuite maintains the sales team data for transactions that were entered while Team Selling was being used. This ensures that commission payments and quota calculation remain accurate.

If, however, the sales rep on one of these transactions is modified, the team selling information is lost and the commission data is updated to reflect the change.

Setting Up Team Selling

Sales teams are created to include all of the employees that work together to close deals. Each member of a sales team is assigned a sales role that describes what they do to aid the sales process.

Creating a Sales Role

Before you create a sales team, you must create sales roles and assign them to your employees.

> **Note:** The Sales Rep sales role is included by default. If you allow sales team contributions in excess of 100%, you must also create an adjustment rep sales role. For more information on overassignment, see Overassignment and Adjustment Reps.

To create a sales role:

1. You must enable Team Selling feature in Setup > Company > Enable Features > CRM subtab > Sales section > Team Selling.
2. Go to Customers > Other > CRM Lists. Click **Sales Role**.
3. Enter a name and description for the role.
4. If this is a role assigned to sales reps, check the **Sales Rep** box.

   Employees with sales rep sales roles appear on sales reports and KPIs.
5. Click **Save**.

Next, select the role in the Sales Role field on the **Human Resources** subtab of each employee's record.

Creating a Sales Team

After you have assigned sales roles to your employees, you can create a sales team record.

Sales teams in NetSuite are groups of employees. Each employee in a sales team has a designated contribution percentage. A member's contribution percentage determines how much of a transaction's total is used to calculate:

- commission earned for that transaction
- how much of the transaction counts towards a quota
- how the transaction affects the sales forecast

> For example, a sales rep has a 10% contribution percentage in their sales team. When one of their team's customers completes a transaction, the sales rep earns 10% of the commission that would have been earned had the sales rep been the only rep on the deal.

When creating a sales team, you choose the primary sales member by checking the Primary box next to the member's name. Only the primary sales rep can edit the sales forecast for transactions associated with the team. Additionally, the primary sales rep appears on sales reports in the Primary Sales Rep column.

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To create a sales team:

1. Go to Setup > Sales > Sales Management > Sales Teams > New.
2. Enter the name of the sales team.
3. Select the owner of the group.
4. If this group has an email alias in your email application, enter that address in the **Email** field.
5. On the **Members** subtab, do one of the following to add members to this group:
   - To add individual members, enter part of a member's name in the **Name** column, and press **Tab**. Select a member, and click **Add**. Repeat these steps for each member.
   - Click **Add Multiple,** and hold CTRL to select more than one member from the list.
   - Click **Add With Search** to enter search criteria for the members you want to add.
6. In the **Access Level** column, select the level of access this person should have to the group's calendar and events.
7. The sales role on the employee's record appears in the **Sales Role** column.

   You can change the employees sales role for this sales team.
8. Check the box in the **Primary** column if this employee is the lead for this sales team.
9. In the **Contribution %** column, enter the default contribution percentage for each team member.

   > ⓘ **Note:** Allow Overassignment in Sales Team preference at Setup > Sales & Marketing Automation > Sales Preferences.

   You can later adjust a team member's contribution percentage in the **Contribution %** column on individual sales transactions or customer records.
10. Click **Add**.
11. Repeat these steps for each member of the group.
12. If you allow contribution overassignment, select an adjustment rep for each manager in the sales team. For more information, read Overassignment and Adjustment Reps.
13. Click **Add**.
14. Click **Save**.

Now, you can assign this sales team to customers and sales transactions.

Overassignment and Adjustment Reps

If you allow contribution percentages to exceed 100%, you must create adjustment sales reps for each sales team to ensure that sales reports show proper totals.

Overassignment enables you to permit sales reps to count the full transaction amount when calculating quota, commission or sales forecast, even if other sales reps were involved.

Before you create an adjustment rep record, you must create an adjustment rep sales role. For more info, see Creating a Sales Role.

To create an adjustment sales rep record:

1. Go to Setup > Sales & Marketing Automation > Sales Preferences.
2. Check the **Allow Overassignment in Sales Team** box.
3. At the bottom of the page, enter a name for the adjustment rep.

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Best practice is to name your adjustment reps so that you can tell which sales manager or supervisor they are created for, for example, **AdjustmentRep_Linda Smith**.

4. In the **Sales Role** field, select **Adjustment Rep**.

5. Select the sales manager or supervisor whose sales totals you want this adjustment rep to correct.

6. Click **Add**.

Now, you can add this adjustment rep to a sales team.

To add an adjustment rep to a sales team:

1. Open the sales team group record at Customers > Relationships > Groups > New.

2. On the **Members** subtab, select the adjustment rep for the team's supervisor or manager in the **Name** column.

3. In the **Sales Role** column, select the adjustment rep for this team's manager or supervisor.

4. In the **Contribution %** column next to the adjustment rep, enter the amount in excess of 100% the other sales rep team members contribute.

5. Click **Add**.

6. Click **Save**.

Adjustment reps appear in the sales team on sales reports and KPIs.

Associating Sales Teams with Customers and Transactions

With the Team Selling feature enabled, you can associate sales teams with sales transactions and with lead, prospect, and customer records.

To associate a sales team with a lead, prospect or customer:

1. Edit the record you want to associate with a sales team.

2. Click the **Sales** subtab.

3. In the **Choose Team** field, select the sales team.

   The sales team members are listed on the **Sales Team** subtab.

4. Click the **Sales Team** subtab.

5. You can do the following:

   - Select the primary rep for this record in the **Primary** column.

   - Adjust the contribution percentages for this record.

   - Add additional sales team members for this record.

6. Click **Save**.

Now, when you enter a transaction for this lead, prospect, or customer, the sale is tied to the sales team for the purpose of generating commission, calculating quota, reporting sales, and forecasting. If you view a record, the primary rep is shown in the Sales Rep field with the primary rep's contribution percentage.

When you enter a transaction for a customer, the sales team associated with the customer is selected by default on the Sales subtab. You can adjust the settings for a sales team on individual transactions

by altering the contribution percentages, changing the designated primary rep or adding members to the sales team.

To associate a sales team with a sales transaction:

1. On the transaction, click the **Sales Team** subtab.

   If the customer on the transaction is assigned to a sales team, it is selected by default on the **Sales Team** subtab.

2. If no sales team is chosen by default, select a sales team in the **Sales Team** field.

3. Adjust the sales team as necessary for this transaction.

4. Click **Save**.

Now, the transaction appropriately impacts the sales team's commission, quota, sales, and sales forecast.

For sales reports that are not sorted by sales reps, transactions show only for the primary sales rep listed on a transaction.

Any changes made to a sales team on a transaction do not affect the sales team on the group record or customer record. For information on changing sales teams, see Mass Updating Sales Teams and Updating Individual Sales Teams.

If you want to reassign a sales team using your existing sales territories, edit the customer record. On the Sales Team subtab, remove each member of the sales team. Then, select **Reassign Using Territories** in the Employee column, and set the Contribution % to 100.

Mass Updating Sales Teams

Mass updates are a convenient way of updating an individual employee's (sales rep's) membership of a sales team, across multiple customer accounts. Mass updates are based on saved search criteria and are applied to the employees list on the Sales Team submenu on Company records. There are three types of Sales Team Member updates, with the setup process common to all types. See Sales Team Member Mass Update Types for an explanation of what each type of update does.

> ⓘ **Note:** Administrators should enable the Team Selling feature to utilize Sales Teams.

To perform a mass update of sales team members:

1. Administrators, go to Lists > Mass Update > Lists > Mass Update > Mass Updates.
2. Click **Sales Force Automation** to expand the menu.
3. Select the required type of **Team Member** mass update.
4. Add a name for the update in the **Title of Action** field.
5. Select an **Employee** you want the update criteria to apply to.
6. Select a **Sales Role** from the list.
7. From the **Criteria** subtab, add the required fields to filter the results.
8. Complete fields from additional subtabs as required.
9. Click **Save**.
10. Go to Lists > Mass Update > Saved Mass Updates
11. Click **Preview** alongside the required saved mass update.
12. Click **Perform Update** to amend the selected records.

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Sales Team Member Mass Update Types

There are three types of sales-team related mass updates:

- **Add Sales Team Member** – adds an employee to the sales team assigned to customers. Employees with sales rep roles are added as non-primary sales team members with 0% contribution percentage.
- **Remove Sales Team Member** – removes an employee from sales teams.

  To prevent you from having sales teams with less than 100% sales rep contribution, you can remove an employee with a sales rep role only if the employee's contribution percentage is set to 0%.
- **Replace Sales Team Member** – replaces an existing sales team member with another employee. The employee is awarded the same contribution percentage, sales role and primary or non-primary status as the member who is being replaced.

  When you perform this update, first select the sales team member you are replacing in the Replace Team Member field. This selection filters the search results to show only those customers whose sales team includes the employee who is being replaced.

  No update takes place if the employee that is replacing another team member is already a member of the sales team.

Updating Individual Sales Teams

You can apply changes you make to sales teams to associated transactions or customer records. These changes can include removing sales team members, adding members, or changing roles and contribution percentages.

If you are updating the sales team on a transaction, check the Update Customer box to apply these changes to the sales team on the customer record.

If you are updating the sales team on a customer record, check the Update Transactions box to apply these changes to transactions entered for this customer.

The following rules apply to these updates:

- Employees with sales rep roles are added with 0% contribution percentages.
- Employees with non-sales rep roles are added with the contribution percentage you enter.
- Employees added to a sales team keep the sales role they were assigned.
- Sales reps are always added as non-primary reps.
- Only the sales team members that are specifically deleted are removed from the updated record or transaction. Employees that do not appear in the sales team you make changes to are not removed from the updated record.
- You can delete non-sales rep employees only if their contribution percentage is 0%.
- These updates are not applied to parent or child records of the updated record.

Sales Rules

A sales rule is a set of parameters for how potential customers are assigned to sales reps. Sales rules are based on standard and custom fields found on lead, prospect, and customer records, such as name, address, and phone number.

Any potential customer that does not match your sales rules is unassigned. These can be assigned manually record, or they can be distributed with the default Round Robin sales territory.

For example, if you have three sales reps in one city, you can make a sales rule of a city and a sales rule for each customer status. When you create the three sales territories, you will select the city rule for each sales rep in that area but choose a different customer status for each sales rep. Now, one sales rep will be assigned leads for that city, one will be assigned prospects, and the other will be assigned customers.

To create a sales rule:

1. Go to Setup > Sales & Marketing Automation > Set Up Sales Rules > New.
2. On the Select a Customer Rule Field page, click the name of the field on which you want to base this rule.

    The type of field you select determines what kind of criteria you can set.
3. On the Customer Field Rule page, enter a name and description for this rule.

    The field you are basing this rule on is shown below the description.
4. Set the criteria you want for this rule.Set multiple subcriteria, if needed. For example, you want to create a zip, postal code rule that includes multiple zip codes.

    The criteria you can set are based on the type of field you are basing this rule on:

    - **Numerical fields** – criteria and subcriteria based on numerical ranges.
    - **Text fields** – criteria and subcriteria based on alphanumerical content.
    - **Box fields** – criteria based on whether the box is checked (is Equal To) or not checked (is Not Equal).
    - **List fields** – criteria based on including or excluding choices in preexisting lists, for example, Lead Source or State.
    - **Custom fields** – criteria based on the information entered in custom fields.
5. Select **Match All Conditions** if you want customers to be assigned by this rule only if they match all criteria and subcriteria you set.
6. Select **Match Any Condition** if you want customers to be assigned by this rule if they meet any of the criteria or subcriteria you set.
7. If you have the option to select subcriteria, set them at the bottom of the page, and click **Add/ Edit**.
8. Click **Save**.

After you have created the sales territory assignment rules, group those rules into territories, and assign the territories to sales representatives. To do this, go to Setup > Sales & Marketing Automation > Manage Sales Territories.

Sales Territories

Sales territories use sales rules to determine how new potential customers are distributed to your sales reps, sales groups, and sales teams.

In NetSuite, sales territories are defined by sales rules. The information in a lead, prospect, or customer's record must match one or all of the criteria of the sales rules to be assigned to that territory.

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> **Note:** Territory assignment works on a first come first served basis. When a successful Sales Territory rule is encountered, and assigns the Lead, the processing of Sales Territory rules stops there. Subsequent rules are not considered and cannot overwrite the initial assignment.

For example, Wolfe Electronics assigns most of their leads to traveling sales reps based on geographic location. The company also purchases lists of leads to cold call that are assigned to telesales reps.

Wolfe sales administrators want leads from purchased lists to be assigned to the telesales team regardless of their geographic location. They set up a specific sales territory that filters all leads that have the lead source **Imported List**.

On the Manage Sales Territories page, the sales administrator gives this territory priority over the geographic territories. This ensures that these leads are separated out before they are assigned based on their location.

When a new lead record is created, if it has the lead source **Imported List**, it is assigned to the internal sales team, even if the lead's address matched the criteria of the Mountain West territory. If it has a different lead source, it is assigned to the geographic sales territory that matches its telephone area code.
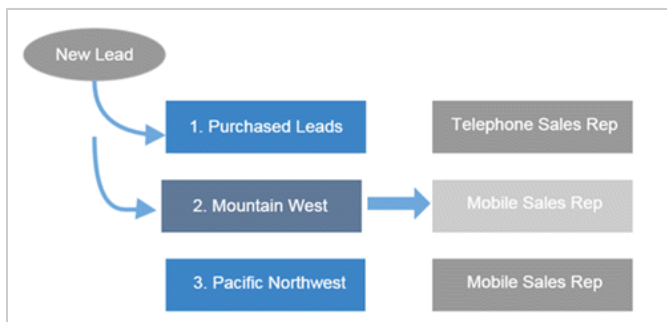
To automate lead prospect and customer assignment, all new leads and prospects should fall within the sales rules you have set up on Setup > Set Up Sales Rules. After the rules are grouped into territories, sales reps and sales groups are assigned to the territories so that new customers are automatically distributed to the correct sales person or team.

Only newly created lead, prospect, and customer records that have not been assigned to a sales rep or sales team are automatically assigned by sales territories. If you want to reassign a lead, prospect, or customer who has been assigned to a rep or sales team, you can use the Reassign Customers by Sales Territory Rules mass update.

By default, customers are assigned to sales reps by a round robin process if they are not assigned by your sales territories.

Setting Up a Sales Territory

To set up a sales territory:

1. Go to Setup > Sales & Marketing Automation > Sales Territories > New.
2. On the Sales Territory page, enter a name for this territory.
3. Enter a description for this territory.
4. Select **Match all rules** if you want customers to meet all the criteria for the rules you select below to be assigned with this territory.
5. Select **Match any rule** if you want customers to be assigned with this territory if they meet any of the criteria for the rules you list below.

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6. On the **Configure Rule Definitions** subtab, in the **Apply Rule** column, select a sales rule to apply to this territory, and click **Add**.

7. Continue adding rules to establish this territory.

8. Click the **Lead Assignment** subtab.

9. In the **sales rep** field, select a sales rep, sales group or sales team to assign this territory, and click **Add**.

   If you do not use the Team Selling features, you can make a sales group appear in this list by checking the **Sales Group** box on an employee group record.

10. For each sales person or group you want assign to this territory, repeat step 9.

    Leads, prospects, and customers that meet these rules are distributed evenly to all the sales reps and groups you select.

11. Click **Save**.

After you have set up the sales territories, you can prioritize them. For more information, see Prioritizing Sales Territories.

Making Changes to Territories

You can make changes to a territory by going to Setup > Sales > Sales Management > Sales Territories and clicking the name of a territory.

On the Rule Definitions, you can add or change the rules included in a territory. On the Assignment subtab, you can change the sales reps assigned to the territory.

Updating Territory Assignments

If your company periodically updates lead, prospect, and customer assignments through your sales territories, there are two other options you can use:

- **Keep Current Sales Rep** – This option lets you choose to maintain the sales rep or team selected on lead, prospects, or customer records.

  For example, if you use scripting to apply your sales rules and territories on a nightly basis, you can choose not to reassign records that meet some sales rules.

- **Clear Sales Rep Assignment** – This option lets you remove the assigned rep or team from leads, prospects, and customers who meet the territory's criteria.

  For example, if you wanted to have all leads who have not been addressed in the last month, you could clear the Sales Rep field, and your sales team could manually reassign them.

You can choose either of these options on the Assignment subtab of a sales territory in the Sales Rep column.

Prioritizing Sales Territories

The order in which territories are listed determines which territory a customer is assigned to if the customer meets the required rules for more than one territory. You can change the priorities at Setup > Sales > Sales Management > Sales Territories (Administrator) on the Manage Sales Territories page. Single click the icon next to the territory name. The cursor will change to a four-headed cursor. You can now click and drag to reorder the list. The position of the item you are moving is indicated by a gray horizontal rule.

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Establishing a Quota

Quotas are goals you set for sales representatives. You can create and track quotas for sales reps by item, class, location, or department.

You can set quotas for sales reps based on company sales goals, and edit forecasts by sales rep to determine how close a sales rep is to their quota. You can also adjust the amount forecasted to reflect deals that do not yet have transactions at .

If you want to track quarterly quotas instead of monthly, an administrator can go to > Forecasts, and check the Forecast Quarterly (vs. Monthly) box.

If you use NetSuite OneWorld, you choose a subsidiary on which to base each quota. Sales associated with the subsidiary you select and sales tied to any child subsidiaries are measured by this quota.

If you have the Commissions feature enabled, you can create commission plans based on quotas. For more on setting up commissions, see Commissions.

To establish quotas:

1. Go to Forecast > Setup > Establish Quotas.

2. In the **Rep** field, select the sales rep for whom you want to set up quotas.

   For an employee to show in this list, go to the employee record at Lists > Employees > Employees. Click **Edit**, and on the **Human Resources** subtab, check the **Sales Rep** box.

   When you select a sales rep, the periods or months for the year selected fill in the columns below.

   > **Note:** If you select a sales manager or sales administrator in this field, the quota you set is for that individual and not for the sales team. To make this a quota for the entire sales team, check the **Team Quota** box.

3. To set a quota for a specific item, department, class, or location, make your selection in the corresponding field.

   You can set a quota based on only one of these options. For example, if you set a quota for an item, you cannot also base that quota on a location.

4. In the **Saved Search** field, select the **Commissionable Item** search on which to base this quota.

5. If you use NetSuite OneWorld, select the subsidiary associated with transactions measured by this quota.

6. In the **Year** field, select the year for which to establish quotas. Quotas can be set five years retrospectively, as well as five years in the future.

7. In the **Total** field, do one of the following:

   - Enter a total sales dollar amount for the year, and click **Distribute** to divide this total evenly to each period.

   - In the **Amount** column for the first period, enter the amount that you want as the quota for each period. Click **Fill Down** for this amount to fill in the **Amount** column for each period. The sum of all period quotas appears in the **Total** field.

   - Enter individual sales quotas for each period below, and the total field fills with the sum of the period amounts.

8. To create a quota for a sales team, select the team manager in the **Rep** field, and check the **Team Quota** box.

9. In the **Target On** field, select from the following options:

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- **Sales** – This quota measures the sales amounts.
- **Alt.Sales Amount** – This quota measures the alternate sales amounts.

  For more information, read the help topic Alternate Sales Amounts.
- **Custom Field** – This option displays the **Custom Field** field through which you choose the amount field on which this quota should be measured.

10. In the **Custom Field**, select the custom transaction column amount field on which this quota should be measured. Custom transaction column fields must be defined by **Type: Currency** and can be based on any standard or custom currency amount field. For more information, read the help topics Creating a Custom Field, Table of Custom Field Type Descriptions, and Transaction Line Custom Field.

11. Click **Save**.

When you set quotas for individual sales reps, you can then set up and view each sales rep's personal forecast in comparison to the quota. Edit and adjust forecasts for sales reps at Forecast > Setup > Edit Sales Rep Forecast.

Use the Sales Forecast vs. Quota report to track how your sales reps are succeeding at reaching these quotas throughout each sales period. This report is updated with each sales transaction so that you and your sales reps can know exactly how close they are to their quotas at any time.

If you use the Alternate Sales Amount feature, the following quota reports are available:

- **Alt. Sales Forecast vs. Quota** – This report replaces the Sales Forecast vs. Quota report.
- **Alt. Sales and Billings Forecast vs. Quota** – This report shows both the ASA forecast and quota and the billings forecast and quota.
- **Billings Forecast vs. Quota** – This report shows the billings forecast and quota.

To view or edit existing quotas, go to Forecast > Setup > Establish Quotas. Select the year and sales rep whose quota you want to view. Select the item, department, location, or class if you have set up quotas based on any of these. The Total field fills when you select your choices in these fields.

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 the NetSuite user interface and Standard Centers, see the help topic Centers Overview.

Setting up the Enhanced Sales Center

Prerequisites

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

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- 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 be installed only 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 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
- 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 Ctr
- Sales Mgr - Enhanced Sales Ctr
- Sales Rep - Enhanced Sales Ctr
- Publisher - Enhanced Sales Ctr

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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 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

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- 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
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 ℹ️ **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	

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Field Labels on Lead Records			
Enhanced Sales Center	**Standard Sales Center**	**Fields used in other popular CRM applications**	**Search Fields to Use**
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			

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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
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 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.

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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 performing any customization to the Enhanced Sales Center:

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

> **ⓘ Note:** Ensure 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** subtab 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 list, 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

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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.

Sales Forecasting

The ability to predict sales is one of the most important requirements for the success of your business. How you compile and calculate your sales forecasts can impact all aspects of your business, from production to inventory to cost, and ultimately to revenue.

Whether you are an executive viewing the company's forecast at month end or a sales rep closing a deal, all of the up-to-the-minute information you need to make sound business decisions is a few clicks away.

If you are a sales rep, read A Sales Persons' Guide to Forecasting to get started using NetSuite accurate forecasting tools.

NetSuite provides a flexible forecasting tool that can be configured to your business' forecasting needs:

- NetSuite provides comprehensive forecast calculation methods and a three-tiered probability system that gives a high degree of accuracy.
- NetSuite includes key performance indicators (KPIs) like Forecast, New Opportunities, and Total Pipeline that you can use to view and manage all aspects of your forecast right from your dashboard.
- The Sales Rep Forecast Editor lets sales reps leverage their experience and knowledge to adjust their forecasts. Entering forecast overrides and updates ensures that the forecast is accurate and reflects the best notions of your sales force.
- NetSuite reporting tools help you compile and slice forecasting data to give you exactly the information you need.

Using NetSuite Sales Forecasting

Sales forecasting is used by the following roles:

- **Sales Reps** – For a sales rep, having an accurate representation of your sales forecast is key to making sure you are on track to meet your quota. As you enter orders and opportunities in NetSuite, your forecast numbers are updated in real time right on your dashboard allowing you to adjust your sales strategy with the certainty that you have accurate numbers at hand.

  Also as a sales rep, you know better than anyone which deals are likely to be closed and when they will close. With NetSuite, you can update and override the forecast calculated by the system with a more accurate number.

  If you are a sales rep, read A Sales Persons' Guide to Forecasting for a short introduction to using NetSuite to manage your forecast.

- **Sales Managers** – Sales managers need the most accurate forecast figures to ensure their teams are meeting quota.

  With forecast reports and KPIs, sales managers can drill down to see how each rep is performing on a customer or transaction level.

  The forecast accuracy reports provide historical data on how well you and your reps have predicted sales. Historical data helps you make adjustments necessary to report accurate forecast amounts to company executives.

- **Executives** – Company executives are constantly in touch with the company sales forecast. Forecast KPIs and reports give an up-to-the-minute picture of the sales forecast that is essential when monitoring your company's performance with respect to revenue goals.

Working With Forecasting

To get started using forecasting:

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- Review the forecasting options available in Setting Up Sales Forecasting.
- Instruct your sales reps to read A Sales Persons' Guide to Forecasting.
- Review the recommendations in Forecasting Best Practices.

Setting Up Sales Forecasting

The NetSuite forecasting feature is simple to use and available with little setup required. As sales reps create opportunities and close deals, NetSuite automatically includes these amounts in your sales forecast.

The Calculated Forecast

NetSuite calculates your sales forecast as the sum of the following:

- Opportunities with no estimates attached or with estimates that are not set to be included in the forecast
- Estimates set to be included in the forecast that have not been converted to closed sales
- Unbilled sales orders that have not been converted to cash sales or invoices
- Cash sales and invoices within the time period you are forecasting

If you use weighted forecasting, the calculated amount for each opportunity or estimate is multiplied by the probability of close. For example, an opportunity with a total of $1000 and a 40% probability of close would have a weighted forecast amount of $400.

Forecasting Updates and Overrides

No one has a better feel for their sales forecast than the sales rep. If the calculated forecast does not match what a sales rep anticipates for their sales numbers, they can use the Forecast Editor to enter a override forecast.

Saving your forecast creates a snapshot of a rep's best prediction of their sales at that point in time. To ensure that the company-wide forecast is accurate, reps should review and update their forecasts on a regular basis.

Sales managers can use the Manager Forecast Editor to enter override forecasts that roll up into the reports viewed by successive levels of your organization. The Manager Forecast Editor uses the judgement and experience of a company's sales managers to know how accurately individual reps are reporting their sales and pipeline.

Manager overrides to a rep's forecast are not seen by the sales rep. Therefore, the sales reps continue to work for the best deal they can close regardless of what the manager thinks is a more likely outcome.

Three-tiered Probability System

When sales reps create opportunities and estimates, they place each record into one of three categories: worst case, most likely, and upside. These categories, which you can rename as required, indicate how likely it is that a deal will close. Worst case is used for deals that are likely to close. Upside is used for deals that are not likely to close. Most likely is used for deals that are somewhere in between the other two categories.

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Using this three-tiered probability system gives the sales rep initial control over how an opportunity is reflected in the forecast, providing a level of accuracy the moment the opportunity is entered.

Forecast KPIs and Snapshots

With NetSuite you can view real-time forecast Key Performance Indicators (KPIs) and Snapshots on your dashboard, including closed sales and recurring revenue as well as the opportunities and quotes in your pipeline.

You can show a variety of forecast key indicators and snapshots on your dashboard that give you an up-to-the-minute look at your forecast numbers as soon as you log in to NetSuite.

You can view any of the following forecast snapshots on your dashboard:

Snapshot	Description
Total Open Estimates	Shows the estimates (quotes) that are open as of the date you select.
Total Open Opportunities	Shows the opportunities that are open as of the date you select.
Forecast by Status	Shows forecast divided by customer status, providing a sense of where potential sales are in the sales cycle.
Sales Reps by Forecast	Shows the top sales reps by forecast for the date range you choose.

When you are logged in as sales manager, forecast and quota key indicators show the forecast and quota amounts for your team. Sales reps see their personal forecast and quota amounts.

You can also include Historical Metrics in your forecast snapshots and reports.

Sales Management Snapshots

Sales management report snapshots can be added as dashboard portlets to provide real time sales, forecast, and order totals, visible by sales team.

The following portlets are available:

Portlet	Description
Sales Managers by Forecast	Shows the sales forecast for each sales team.
Sales Managers by Sales Orders	Shows the approved sales order totals for each sales team.
Sales Managers by Sales	Shows the sales totals for each sales team.

To show sales management snapshots:

1. On your Home tab, click **Personalize Dashboard**.
2. In the Add Content frame, click on **Report Snapshots**.
3. Click **Sales Management**.
4. Drag the portlets you want to show onto your dashboard.

Click the icon next to a manager to expand or collapse the sales team. Clicking a currency amount or the **View Report** link opens a report relevant to the snapshot. For example, clicking a forecast amount for a sales rep opens the Sales by Sales Rep Detail report.

Forecast Reporting

NetSuite provides extensive Forecast Reports to enable you to manage and report on your forecasting data. The following types of forecasting reports are available:

- **Accuracy Reports** – Forecast Accuracy reports such as the Forecast Accuracy Report and the Calculated Forecast Accuracy Report, provide another layer of checks and balances that you can use to sharpen your forecast based on past performance.
- **Summary Reports** – Summary reports such as the Sales Forecast vs. Quota Report bring together all of your forecast data. For more information, see the help topic Forecast Reports.
- **Detail Reports** – Detail reports such as the Forecast by Sales Rep Summary Report, which lists each sales rep's forecast for the period you define in the footer of the report, provide a granular look at your report data.

A Sales Persons' Guide to Forecasting

Sales forecasting is the process of estimating future sales. Accurate forecasts are essential if your business is to make informed decisions and to plan accordingly for the short and long-terms. Sales forecasting not only impacts the sales department, but provides insight into how a company should allocate its production resources, organize its workforce and manage its cashflow.

NetSuite enables sales personnel to provide your company with accurate and timely sales forecasts.

After logging in to NetSuite as a Sales Person, you see your dashboard. From here you can configure your Key Performance Indicator portlet. This portlet provides a quick and effective way of monitoring your forecast directly from your home screen.

Start by selecting **Set Up** from the menu indicated.
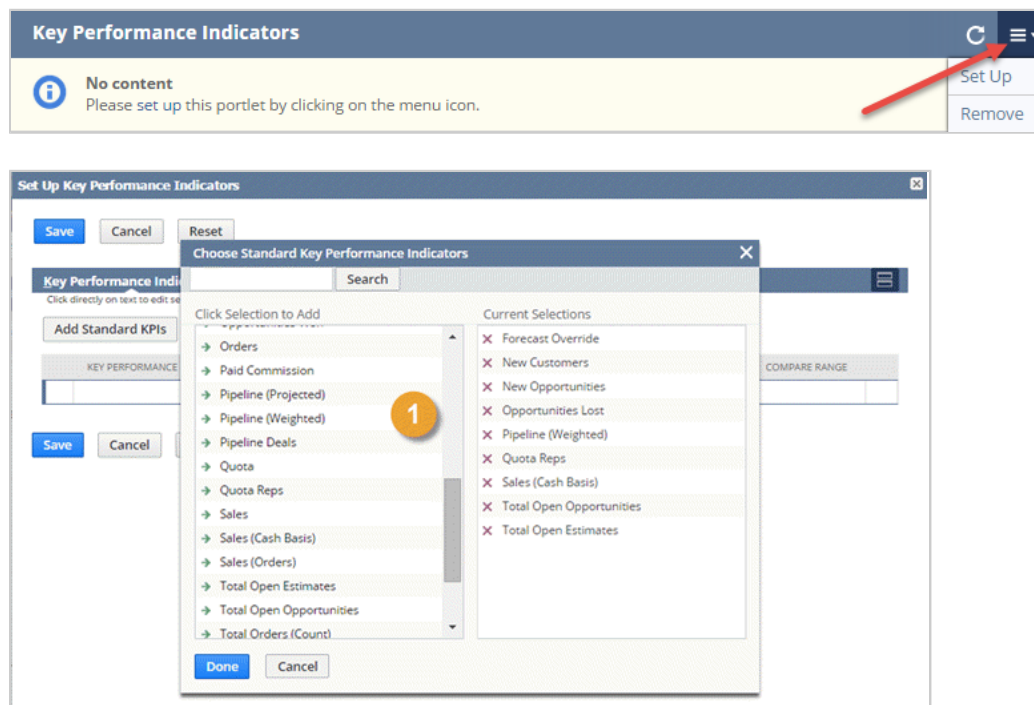
1. Click the **Add Standard KPIs** button. Select items from the left hand column to add to your dashboard. Click **Done** then **Save**.

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1. Your KPIs are set up to show the required forecast information on your dashboard.

As you create new opportunities for the deals you are pursuing, you assign them a status to reflect how far they are in the negotiation process.

1. Each status is automatically assigned a corresponding % probability score, indicating the likelihood of a deal closing. For example **In Negotiation** is awarded 75%. These values are used to determine the **Weighted Forecast**.

2. To ensure your opportunities are shown in the correct forecast scenario, select the category in the **Forecast Type** field.

3. Enter a range of possible projected amounts for the opportunity. Update the field as negotiations progress, to maintain forecast accuracy.

To provide your manager and executives with accurate forecasts, you should regularly review and verify the amounts. **The Sales Rep Forecast Editor** is a single-screen summary of all your opportunities and sales in your forecast. From here you can make adjustments.

Access the Forecast page at Forecast >Setup > Edit Sales Rep Forecast > List. Click **Edit** on the required forecast.

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1. If you think your forecast differs from that calculated by NetSuite, you can manually override the values. These values are the forecast seen by your manager.

2. Select the forecast category for each opportunity: Omitted, Worst Case, Most Likely or Upside.

3. Update the expected close date and status from the lists.

4. Update the range of forecast values for each opportunity.

NetSuite comes pre-configured with a wide variety of forecast reports. If, however, you need to present specific types of information, you can customize the reports.

For example, a Wolfe Electronics sales person wants to see weighted **Pipeline** amounts on the **Forecast by Status** report. This report provides a view of how much of the forecast remains to be closed.

1. Click the **Customize** button to open the **Report Builder**

1. Use **Search Fields** to access the required field. Click the **Pipeline (Weighted)** icon to add the column at the end. You can reorder the columns using the **Move Left** and **Move Right** buttons. Click **Preview** to verify that the required information has been added to the report.

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2. Your customized report will be generated in a new page. Click **Return To Customization** and **Save** to complete the set-up process.
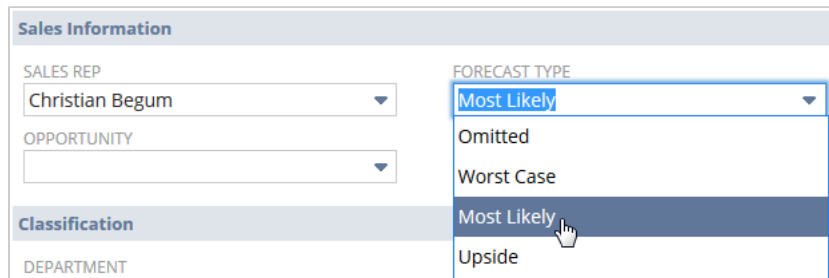
You are ready to begin managing your forecast with NetSuite.

Forecasting Best Practices

Requiring sales reps to place each opportunity and estimate into a forecast category permits managers and executives to view realistic forecast numbers and to get a sense of other open opportunities even if they are considered not likely to close.

To get the most out of your sales forecasting, you should do the following:

- Keep opportunities current. Instruct your reps to make sure their opportunities always reflect the most current developments in the negotiations.

- Make sure sales reps understand how to categorize their opportunities and how to adjust and save their forecasts.

- Require all of your sales reps to manage and update their forecasts on a regular basis.

    NetSuite automatically calculates sales forecasts, but without full participation, your team and company-level forecasts will lack the accuracy required to anticipate sales. For more information, see Saving Sales Rep Forecasts.

- Impose a regular deadline every week by which each rep must save their forecast. This deadline should match the Forecast Accuracy preferences set at Setup > Sales > Preferences > Sales Preferences. For more information, see Forecasting Preferences.

- Establish quotas for your sales reps that are in line with your company's revenue goals. Categorize quotas by class, department, or location, as appropriate. For more information, see Establishing a Quota.

- Manage your sales team goals with team quotas. When a sales manager saves a manager forecast, they see how well the team is performing in the context of their quota. For more information, see the help topic Team Quotas.

- You can rename the forecast categories to fit the terminology of your business at Setup > Sales > Preferences.

Forecasting Preferences

You can set your company forecast preferences at Setup > Sales & Marketing Automation > Sales Preferences. Click the Forecasts subtab.

The following preferences are available:

- **Calculate Forecasts as Weighted** – Check this box if you want forecast totals weighted. Weighted amounts are calculated by multiplying the probability by the projected amount of each transaction.

- **Forecast Quarterly (vs. Monthly)** – Check this box to edit forecasts and establish quotas by quarter instead of by month.

- **Minimum Forecast Probability** (available only when Advanced Forecasting is not enabled) – Enter the minimum probability that an opportunity or estimate must have to be included in sales forecasts.

- **Low Forecast Name** (requires Advanced Forecasting feature) – Enter the name your company uses for the lowest forecast or worst case forecast category. This category is used for the forecast amounts that are very likely to be converted to a sale.

- **Medium Forecast Name** (requires Advanced Forecasting feature) – Enter the name your company uses for the medium or most likely forecast category. This category is used for deals that are likely but not certain to be converted to a sale.

- **High Forecast Name** (requires Advanced Forecasting feature) – Enter the name your company uses for the highest or upside forecast category. This category is used for deals that are early in the sales process or are not likely to be converted to a sale.

- **Default Forecast Type** – Select the forecast type you want set on estimates and opportunities by default. You can change the forecast type for each individual transaction.

- **Use Estimates in Forecast** – Check this box if you want to include estimates in forecast reports, snapshots, and key performance indicators.

- **Multiple Projected Amounts** (requires Advanced Forecasting feature) – Check this box to enter multiple projected amounts on opportunities. When this preference is enabled, you enter a range of projected amounts on opportunities.

- **Forecast Accuracy (Weekly View)** – To determine at which point in the week you want to compare the sales forecast to the actual sales for the period, select the day and time of the forecast you want to show in the report.

  You can set this preference to coincide with a weekly deadline that you set for your sales reps to save their forecasts.

- **Allow Setting Status in Forecast Editor** – Check this box if you want to allow sales reps to adjust the statuses of opportunities and estimates when saving forecasts.

- **Allow Setting Probability in Forecast Editor** – Check this box if you want to allow sales reps to adjust the probability of opportunities and estimates when saving forecasts.

When you are finished, click Save.

Advanced Forecasting

The Advanced Forecasting feature lets you manage and track three categories of sales forecast amounts. These amounts represent your sales team's worst case, most likely, and upside forecasted sales amounts.

Advanced forecasting gives your sales reps more control over their sales forecast and increases the accuracy of your forecast reports and KPIs.

Managing different forecast categories also lets sales managers evaluate how well sales reps are able to predict their sales.

With Advanced Forecasting, you can also enter multiple projected amounts on opportunities that are used to calculated your worst case, most likely, and upside sales forecast. For more information on forecasting preferences, see Forecasting Preferences.

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To enable the Advanced Forecasting feature, an administrator can go to Setup > Enable Features > CRM > CRM > Sales. Check the Advanced Forecasting box, and click Save.

Estimates in the Forecast and Pipeline

With Standard Forecasting, an estimate is included in the sales forecast and pipeline if:

- the estimate's expected close date falls within the period of the report.

  This is true even if the estimate is associated with an opportunity, and the opportunity's expected close date falls within the report's period.

- The estimate's probability of close exceeds the minimum forecast probability set at Setup > Sales > Preferences > Sales Preferences > Forecasts.

> **ⓘ Note:**   This preference is not available if you are using the Advanced Forecasting feature.

- The Include in Forecast box is checked on the estimate.

If you use the Advanced Forecasting feature, estimates are included according to the following rules:

- If the estimate is not associated with an opportunity, the estimate is included in the forecast category selected in the Forecast Type field on the estimate.

- If the estimate is the only estimate associated with an opportunity, the estimate is included in the forecast category selected on the estimate and in each higher forecast category.

- If two estimates are associated with an opportunity, the estimate in the lower category is included in the forecast categories of the other estimate.

Single Estimates with Advanced Forecasting

If the estimate is the only estimate associated with an opportunity, the estimate is included in the forecast category selected on the estimate and in each higher forecast category.

Example

An estimate is created from an opportunity. The estimate total is $100.

Forecast Type	Worst Case Forecast	Most Likely Forecast	Upside Forecast
Worst Case	$100	$100	$100
Most Likely		$100	$100
Upside			$100

If an estimate is in the worst case category, it appears in each forecast. If it is in the most likely category, it is included in the Most Likely forecast and Upside forecast. Upside estimates are included in the Upside forecast.

Multiple Estimates with Advanced Forecasting

If two estimates are associated with an opportunity and both are included in the forecast, the estimate in the lower category is included in forecast categories up to the other estimate.

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Example

The first estimate:

- Forecast Type = Worst Case
- Estimate Total = $100

The second estimate:

- Forecast Type = Upside
- Estimate Total = $300

This table shows how the estimates are included in the forecast:

	Worst Case Forecast	Most Likely Forecast	Upside Forecast
Estimate 1	$100	$100	
Estimate 2			$300

Estimates and Team Selling

If you have enabled the Team Selling feature, an estimate's forecast amount for a sales rep is determined by the sales rep's contribution percentage on the estimate.

For example, a sales rep has a 10% contribution percentage in their sales team. When one of the team's customers is issued an estimate, 10% of the estimate's total is reflected in the rep's sales forecast.

For more information, see Creating a Sales Team.

Opportunities in the Forecast and Pipeline

An opportunity is included in the sales forecast and pipeline if it meets the following requirements:

- The opportunity has not been converted to a sales order, cash sale, or invoice.
- The opportunity does not have an associated estimate marked to be included in the forecast.
- The opportunity's expected close date is within the reporting period.
- The estimate's probability of close exceeds the minimum forecast probability set at Setup > Sales > Preferences > Sales Preferences > Forecasts.

> **ⓘ Note:** This preference is not available if you are using the Advanced Forecasting feature.

If the expected close date of an opportunity differs from its estimate, the estimate's projected close date determines whether it appears on a pipeline or forecast report.

If you use Advanced Forecasting, sales reps choose to assign opportunities to one of three forecast types: low, middle, and high.

The opportunity totals in the forecast depend on if you have set the Multiple Projected Amounts preference at Setup > Sales > Preferences > Sales Preferences > Forecasts.

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Advanced Forecasting With Multiple Projected Amounts

If your company has enabled the Multiple Projected Amounts preference at Setup > Sales > Preferences > Sales Preferences, you can designate a range of projected values for each opportunity.

The lower amount in the projected amount range represents the low, or worst case, forecast amount. The higher amount represents the high, or upside, forecast amount. The amount in the Projected Total field represents the middle, or most likely, forecast amount.

The forecast type you choose for an opportunity determines the amount that is included in the forecast according to the following:

- Opportunities and estimates marked Worst Case are included in each forecast category.
- Opportunities in the Most Likely category are included in the Most Likely and the Upside forecasts.
- Opportunities in the Upside category are included in the Upside forecast.

With the Multiple Projected Amount preference enabled, the projected amount in each category is included in the corresponding forecast category.

The example below explains how an opportunity's total is calculated based on the forecast type you select.

Example 1. Example

A Wolfe Electronics sales rep enters an opportunity record for a customer. After selecting the items the customer is interested in, the projected total for the opportunity is calculated to $2000.

The rep believes the deal could be worth half that amount or potentially worth more. In the Range fields the rep enters a lower amount of $1000 and a higher amount of $3000.

The forecast amounts for this opportunity are:

- Worst case – $1000
- Most likely – $2000
- Upside – $3000

The amount that NetSuite uses to calculate the forecast amount of this opportunity depends on the forecast type the rep assigns to this opportunity.

Forecast type	Worst Case Forecast	Most Likely Forecast	Upside Forecast
Worst Case	$1000	$2000	$3000
Most Likely		$2000	$3000
Upside			$3000

If you track weighted forecasts, the weighted amount of opportunities and estimates in each category is included in the forecast.

Advanced Forecasting Without Multiple Projected Amounts

If your company does not use the Multiple Projected Amounts preference, each opportunity has a single projected amount.

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The forecast type chosen on the opportunity determines the forecast categories an opportunity is included in the forecast according to the following:

- Opportunities and estimates marked Worst Case are included in each forecast.
- Opportunities in the Most Likely category are included in the Most Likely and the Upside forecasts.
- Opportunities in the Upside category are included in the Upside forecast.

With the Multiple Projected Amounts preference disabled, the projected amount of the opportunity is applied to each forecast category according to the rules above.

The example below explains how an opportunity's total is calculated based on the forecast type you select.

Example

A Wolfe Electronics sales rep enters an opportunity record for a customer. After selecting the items the customer is interested in, the projected total for the opportunity is calculated to $2000.

The forecast category this opportunity appears in is determined by the forecast type chosen on the record.

Forecast type	Worst Case Forecast	Most Likely Forecast	Upside Forecast
Worst Case	$2000	$2000	$2000
Most Likely		$2000	$2000
Upside			$2000

If you track weighted forecasts, the weighted amount of opportunities and estimates is included in the forecast.

Opportunities and Team Selling

If you have enabled the Team Selling feature, an opportunity's forecast amount for a sales rep is determined by the sales rep's contribution percentage on the opportunity.

For example, a sales rep has a 10% contribution percentage in their sales team. When an opportunity is created for one of the team's customers, 10% of the opportunity's total is reflected in the rep's sales forecast.

For more information, see Creating a Sales Team.

Saving Sales Manager Forecasts

Managers can use the Manager Forecast Editor to:

- view the calculated forecast for your team
- enter and save an override forecast amount for the team
- view the saved forecast amounts for each rep in your team
- enter new override amounts for individual sales reps in your team
- view a sales rep's sales forecast in detail

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Override forecast amounts are entered to account for deals that have not yet been entered as transactions. Sales managers can use the forecast override to adjust the forecast amounts of sales reps based on each rep's previous success at predicting their sales.

If a manager overrides a forecast amount entered by a sales rep, this override amount shows when the sales rep views forecast reports and KPIs.

Override amounts entered for the entire sales team do not show on the reports and KPIs viewed by sales reps.

If you use NetSuite OneWorld, you can save one forecast for a sales manager per subsidiary. For example, if your company has three subsidiaries, a sales manager could save a different forecast for each of these subsidiaries.

To edit the forecast for a sales team:

1. Go to Forecast > Setup > Edit Sales Rep Forecast.

2. If you are using NetSuite OneWorld, select the subsidiary you are saving this forecast for.

   If you select a parent subsidiary, this forecast represents the forecast for this subsidiary and all of its child subsidiaries. You can only save one forecast for a sales team per subsidiary.

3. Select the manager of the team whose forecast you want to edit and save.

4. Select the start date of the period you want to view the forecast for.

5. Check the **Alt.Sales** box if this is an alternate sales amount (ASA) forecast.

   The team's quota shows in the Quota field. You can establish team quotas at Forecast > Setup > Establish Quotas.

   The Calculated and Override forecast amounts for the team are shown. The calculated forecast for the team is the sum of the override forecasts of each sales rep.

   If you use the Advanced Forecasting feature, you can see forecast amounts in each forecast category.

6. You can enter Override amounts on this forecast.

   Override amounts appear on forecast reports in addition to the forecast calculated by NetSuite. The calculated forecast appears by default as the Override forecast until you enter an override forecast.

7. At any time, you can click **Restore Calculated** to change the Override forecast to match the calculated forecast amount.

   On the **Forecasts** subtab, the sales reps in this team are listed along with their override forecast amounts.

   You can enter an override forecast amount for any rep in the team.

   The override amounts you enter update the override amounts for the team.

8. Click **Save**.

After you have saved a manager forecast, your forecast reports show the updated forecast amounts.

You can edit a saved manager forecast by going to Forecast > Setup > Edit Manager Forecast. Click Edit next to the forecast.

Saving Sales Rep Forecasts

Sales reps can use the Forecast Editor to:

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- view the transactions that make up their sales forecast
- enter an override forecast, if necessary
- adjust the probability and status of opportunities in the forecast

If you use NetSuite OneWorld, you can save one forecast for a sales rep per subsidiary. For example, if your company has three subsidiaries, a sales rep could save a different forecast for each of these subsidiaries.

If you have enabled the Team Selling feature, sales reps can only edit transactions for which they are the primary sales rep. For more information, see Team Selling.

To edit a sales rep forecast:

1. Go to Forecast > Setup > Edit Sales Rep Forecast.
2. If you use NetSuite OneWorld, select the subsidiary you are saving this forecast for.

   If you select a parent subsidiary, this forecast represents the forecast for this subsidiary and all of its child subsidiaries. You can only save one forecast for a sales team per subsidiary.
3. In the **Sales Rep** field, select the sales rep whose forecast you want to edit and save.

   The sales reps that appear in this field depend on the permissions granted to the role you are logged in with.
4. Select the start date of the period you want to view the forecast for.
5. Check the **Alt.Sales** box if this is an alternate sales amount (ASA) forecast.

   The sales rep's quota shows in the **Quota** field. You can establish quotas at Forecast > Setup > Establish Quotas.

   The **Calculated** and **Override** forecast amounts are shown. If you use the **Advanced Forecasting** feature, you can see forecast amounts in each forecast category.
6. You can change the **Override** amounts on this forecast.

   Override amounts appear on forecast reports in addition to the forecast calculated by NetSuite.
7. At any time, you can click **Restore Calculated** to change the **Override** forecast to match the calculated forecast amount.
8. On the **Opportunities** and **Estimates** subtabs, you can do the following:
   - change the forecast type for a transaction

     > **Note:** Changing the forecast type for a transaction affects which forecast types it is included in. For more information, see Opportunities in the Forecast and Pipeline.

   - click the date to view the transaction
   - change a transactions expected close date
   - change a transactions probability of close
   - change the projected amounts for any transaction
   - adjust the status or probability of a transaction

     > **Note:** Setting Probability in Forecast Editor preferences at Setup > Sales & Marketing Automation > Sales Preferences. Click the Forecasts subtab.

9. On the **Unbilled Orders** and **Actuals** subtabs, you can click the date to view a transaction.
10. Click **Save**.

After you have saved a forecast, your forecast reports show the updated forecast amounts.

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> ⚠ **Important:** Created Opportunities are updated automatically in the Sales Rep Forecast, but **not** in the Sales Manager Forecast to prevent the forecast becoming overwhelmed with tentative opportunities. To include a created opportunity in the Sales Manager forecast, the rep should first update their forecast in edit mode and save the forecast. The figures will then be carried over into the Manager forecast.

Historical Metrics

The Historical Metrics feature lets you save forecast, pipeline, and other valuable sales data for future comparison.

When you enable the Historical Metrics feature, NetSuite automatically begins storing the monthly and quarterly amounts for the following KPIs. You can enable the feature at Setup > Company > Setup Tasks > Enable Features. Click the CRM subtab.

- Forecast
- Forecast (Alt. Sales)
- Forecast Override
- Forecast Override (Alt. Sales)
- Pipeline (Alt. Sales Projected)
- Pipeline (Alt. Sales Weighted)
- Pipeline (Projected)
- Pipeline (Weighted)
- Pipeline Deals
- Total Pipeline (Alt. Sales Projected)
- Total Pipeline (Alt. Sales Weighted)
- Total Pipeline (Projected)
- Total Pipeline (Weighted)
- Total Pipeline Deals

> ⓘ **Note:** Only the amounts for each of these KPIs are saved. The calculation for each of these KPIs is not maintained. For example, if transaction amounts changed after the metric was saved, the historical KPI is not updated with the new information.

When you set up your KPIs for comparison, you can then choose to compare them to any prior month or quarter that you have saved historical data for.

Opportunities and Estimates

Routing leads and setting up quotas are the first steps toward successfully managing your team with NetSuite. As soon as your reps have leads, you want to make sure they are entering opportunities, following up with customers and making sales.

In NetSuite, your reps create opportunity records that give sales managers and executives visibility into the pipeline and sales forecast, providing reps with a central record for tracking and organizing sales activity.

Opportunities and estimates also give you the capabilities you need to manage potential deals for the purpose of calculating the sales forecast and managing your sales team.

Opportunity Records

An opportunity in NetSuite is used to record all the details of a particular deal you are working on with either a prospect or customer. In its simplest form, it is used to record what items your prospect or customer is interested in purchasing from you, along with the expected order value and the date when the deal will likely close. However, it is not necessary to attach specific items and forecasted amounts to create an opportunity record.

Sales reps can use opportunities to record the build-up to a deal: related tasks, events, files, notes, and messages from the customer can all be attached to the record and provide a complete view of the deal as it evolves. Competing companies can also be tracked, as well as being able to provide reasons why you won or lost the deal.

Opportunities appear in sales forecast reports and open opportunities reports. When an estimate has been created from an opportunity record, the estimate is included in the forecast instead of the opportunity. If multiple estimates are created from the same opportunity, you can denote on the estimate record which one you would like included in the forecast.

Creating an Opportunity Record

When a sales rep first speaks with a prospect or customer about a deal, the sales rep creates an opportunity record and indicates which sales items the customer is interested in. The sales rep also enters a probability that the deal will be closed that is used to calculate a projected total. As the negotiations continue, the sales rep can create multiple estimates relating to the deal.

The most critical piece of pipeline information entered on an opportunity by your sales rep is the probability that the deal will close. Probability determines the weighted amount of the deal, which shows on pipeline and forecast reports.

The weighted total is determined by multiplying the probability by the total amount of the items on the opportunity.

Adding up the total weighted amount for all open estimates and opportunities can give an accurate indication of the revenue you will realize by the end of the period. This amount is the pipeline total.

To delete a saved opportunity, from the Actions menu, select Delete. Forecast data will be adjusted accordingly.

> **ⓘ Note:** This is a non-posting transaction.

To create an opportunity:

1. Go to Opportunities > Transactions > Opportunities > New.

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2. If you use custom opportunity forms, select the form to use in the **Custom Form** field.

3. Under Primary Information:

    1. In the **Title** field, enter a name for this opportunity.

        NetSuite assigns a number to the opportunity. You can change this number.

    2. Select the customer or prospect in the **Company** field.

    3. Select a status for the opportunity.

        If a transaction other than an estimate is included in the opportunity, the status is automatically set to **Closed – Won**.

    4. Enter a probability that the deal will close. This probability is used to determine the weighted total of the opportunity.

        - If you selected the status **Closed Lost**, the probability is automatically set to **0%.**

        - If you selected the status **Closed Won**, the probability is automatically set to **100%.**

    5. Enter the date you expect this opportunity to close.

    6. Select a win or loss reason. You can use this list to close an opportunity.

4. Under Forecasting:

    1. The projected total is calculated in one of the following ways:

        - If there are no items selected on the **Items** subtab and there are no estimates or transactions included in the opportunity, you can enter a projected total.

        - If the opportunity has items selected on the **Items** subtab, but no estimates or other transactions included in the opportunity, the total of the items selected appears as the projected total.

        - If there is one estimate associated with the opportunity, and the estimate is marked to include in forecasts, the total of the estimate is shown as the projected total.

        - If there are multiple estimates associated with the opportunity, the projected total is the sum of all the estimates marked to include in forecasts.

        If you manually enter a projected total, that total appears until you click Update Projected on the **Estimates** subtab.

    2. If you are using the Advanced Forecasting feature, you can enter the range of amounts this deal might be worth. First, you must enable the Multiple Projected Amounts preference at Setup > Sales & Marketing Automation > Sales Preferences on the Forecast subtab.

        - The low amount entered must be lower than or equal to the projected amount in the **Projected Total** field. This amount is the Worst Case projected total.

        - The high amount must be greater than or equal to the Projected Total amount. This amount is the Upside projected total.

    3. If you use the Advanced Forecasting feature, in the **Forecast Type** field, select the forecast category you want this opportunity included in. For more information on forecast types, read Opportunities in the Forecast and Pipeline.

        The weighted total of the opportunity shows in the **Weighted Total** field.

        The weighted total is calculated by multiplying the projected total by the probability of close.

5. Under Classification:

    If you track departments, classes, or locations, make the appropriate selections for this opportunity.

> **ⓘ** **Note:** If you use NetSuite OneWorld and the selected customer is shared with multiple subsidiaries, you can choose any subsidiary assigned to the selected customer. For information about sharing customer records with multiple subsidiaries, see the help topic Assigning Subsidiaries to a Customer.

6. On the **Items** subtab, this customer or prospect's currency is shown in the **Currency** field.

7. The exchange rate for this currency appears in the **Exchange Rate** field. You can enter a new exchange rate for this for this transaction only, or you can update the currency's record with the exchange rate you enter here.

8. In the Item column, select the item the customer is interested in, and enter the quantity and other information for this item.

9. Click **Add.**

10. Repeat these steps for each item.

11. On the **Relationships** subtab:

    1. Select a contact in the **Contact** field.

    2. In the **Decision Maker** field, select the contact associated with this customer who is responsible for approving this purchase.

    3. Click **Add.**

    4. Repeat these steps for each contact you want to associate with this opportunity.

12. On the **Partners** subtab:

    1. The partner associated with this customer or prospect appears in the **Partner** field. You can choose a different partner for this opportunity.

       If you have enabled the Multi-Partner Management feature, you can associate partners with this transaction on the **Partners** subtab. For more information, see Associating Sales Teams with Customers and Transactions.

13. On the **Competitors** subtab:

    1. In the Name column, select a company that is competing with yours for the deal, and click **Add.**

       You can create new competitor records at Lists > Competitors.

    2. Click **Add**

    3. Repeat these steps for each competitor.

14. On the **Communication** subtab:

    1. Create any events, tasks, or phone calls you want to associate with this opportunity.

    2. On the **Files** subtab, attach any files you want to associate with this opportunity.

    3. On the **User Notes** subtab, enter any internal notes related to this opportunity.

15. On the **Sales** subtab:

    1. The lead source associated with this customer or prospect is shown in the **Lead Source** field. You may select a different lead source.

    2. Associate sales reps with this transaction in one of the following ways:

       - If you do not use the Team Selling feature, select the sales rep or sales group in the **Sales Rep** field.

         The sales rep or sales group associated with the customer on this transaction is chosen by default.

       - If you use the Team Selling feature, click the **Sales Team** subtab.

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Select the sales team for this transaction. For more information, see Associating Sales Teams with Customers and Transactions.

3. On the **Qualification** subtab, you can enter information regarding the ability and interest level of the customer to make the purchase. For more information, see the help topic Qualifying Leads.

16. Click **Save**.

As soon as you have saved an opportunity record, you can attach tasks, events, and other information related to the opportunity. You can also create estimates, sales orders, cash sales and invoices to associate with the opportunity.

If you have the inline Edit enabled, you can also edit opportunity records from the Opportunities list. Click the information you want to change and make you changes. These changes are automatically saved on the record. For more information about editing inline, read the help topic Using Inline Editing.

As you work with opportunities, you can refine the projected total of the deal by adding or removing items, by changing the probability and status, and you can identify competitors for the deal. For more information on working with opportunity records, read Using Opportunities.

Open opportunities appear on sales forecast reports, open opportunities reports and sales forecast by quota reports.

Using Opportunities

After an opportunity record has been saved, sales reps can attach information related to the opportunity and create estimates and other transactions for the deal.

Attaching Information to Opportunities

To add information to an opportunity record, go to Opportunities > Transactions > Opportunities. On the Opportunities list, click the date for the opportunity you want to add information to.

You can add information to an opportunity record on the following subtabs under the Communication subtab:

- **Messages** – Click Send Email to send an email to contacts associated with this company. To send email to a contact, the contact's record must include a valid email address. Click Save Message to record a message that you receive from a contact associated with this opportunity. You can copy and paste an email message or record information received from a phone call or fax.
- **Activities** – Enter the title and other information for each activity, and click Add. For information about adding contacts, see the help topic Sending Event Invitations.
- **Files** – Select a file in the Attach File column and click Add to attach a file from your file cabinet to the opportunity. Select New to upload a new file to your file cabinet.
- **User Notes** – Enter a title, memo, date, and other information to create a note about this opportunity.

On the **Relationships** subtab, attach contacts, partners, and competitors to your opportunities.

- **Contacts** – Select a contact in the Contact field, select that contact's role, and click Attach to attach an existing contact record to the opportunity. To create a new contact for this opportunity, click New Contact.
- **Partners** – Select a partner you want to associate with this opportunity, choose the partner's role and contribution percentage, and click Attach.
- **Competitors** – Select a competing company in the Name column, and click Add. When you edit the opportunity, you can check the box in the winner column on the Competitors subtab in the event that another company closes the deal.

Creating Estimates and Other Transactions for an Opportunity

When agreement is reached over one of the proposals, the sales rep creates an order from the opportunity, and the opportunity is closed and considered won.

To convert an opportunity to an order, click the Create New Button, and select New Sales Order, New Cash Sale, or New Invoice.
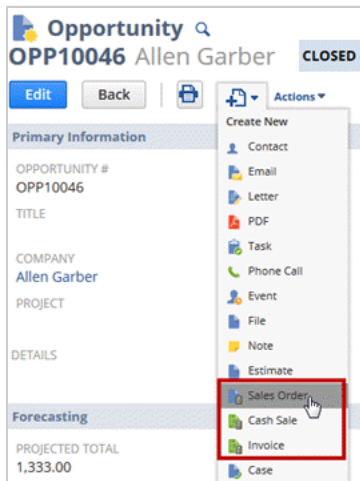
The transaction is automatically filled with the items and company information from the opportunity record. Transactions created outside of the opportunity record do not appear on the opportunity.

You can also associate an estimate or sales transaction with an opportunity by selecting the opportunity in the Opportunity field on the transaction.

Estimates appear on the Estimates subtab. Invoices, cash sales, and sales orders appear on the Closed subtab. When a sales order, invoice, or cash sale is created for this opportunity, the opportunity's status changes to Closed Won.

When you create an estimate for an opportunity, the opportunity itself no longer shows on forecast or pipeline reports. For more information, see Opportunities in the Forecast and Pipeline and Estimates in the Forecast and Pipeline.

Analyzing Opportunities in Your Pipeline

Having access to accurate pipeline and forecast numbers enables you to quickly adapt your team's selling strategies to meet new demands. NetSuite includes a variety of tools to help you manage your company's pipeline so that you can maximize the sales closed by your team.

Your NetSuite dashboard includes key performance indicators that give you a quick look at pipeline amounts and opportunities. Report snapshots, such as the Customers by Pipeline snapshot, appear

as graphs or lists and link to corresponding reports. You can also publish saved search results to your dashboard, giving you a customized list of opportunities, customers or sales transactions.

Opportunities on Your Dashboard

Opportunity reports and KPIs give you easy access to deals that your reps are pursuing. From your Dashboard, you can view custom search results, key performance indicators, and report snapshots that give you information on opportunities.

For example, Wolfe Electronics sales managers use the steps below to show the Opportunities Won key indicator for information on the deals that were won the previous day.

To show the Opportunities Won key indicator:

1. On the **Home** tab, click **Personalize Dashboard**.
2. In the Add Content pane, click **Key Performance Indicators**.
3. In the Set Up Key Performance Indicators popup, click Add **Standard KPIs**.
4. Select **Opportunities Won**, and click **Done**.
5. In the **Range** column, select **yesterday**.
6. In the **Employees** column, select **My Team**.
7. Check the box in the **Compare** column.
8. In the **Compare Range** column select **this month**.
9. Click **Save**.

When Wolfe sales reps log in to the Sales Center each morning, they see the number of opportunities closed yesterday compared to the total for the month.

> Click any KPI or report snapshot for a detailed report that shows the information you are looking for. For example, clicking a date range on the Opportunities Won KPI takes you to the Opportunities Won report. The report is filtered to show the same date range as the KPI.

Saved searches provide another powerful tool you can use to display information on your dashboard.

Wolfe Electronics sales managers use a saved search of opportunities to track open deals that are approaching their expected close dates. This search lets them know which opportunities sales reps should be close to winning. The results of this search appear on their dashboards, so it is one of the first things they see when they log in to NetSuite.

To do this, first create the saved search.

To save an opportunities search:

1. Go to Opportunities > Transactions > Opportunities > Search.
2. Check the **Use Advanced Search** box.
3. Click **Create Saved Search**.
4. In the **Search Title** field, enter **Opportunities to Close This Week**.
5. Check the **Available as Dashboard View** box.
6. On the **Criteria** subtab, in the Filter column select **Sales: Expected Close Date**.
7. In the popup, select **within next one week**, and click Set.
8. In the **Filter** column, select **Document Status**.

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9. In the popup, hold **CTRL**, and select **In Progress** and **Issued Estimate**.

10. Click **Set**.

11. Click the **Results** subtab.

12. Click **Remove All**.

13. Click **Add Multiple**.

14. Hold CTRL, and select **Customer, Probability**, **Sales Rep, Projected Total** and **Days to Close**.

15. Click **Add**.

16. Click **Save**.

Next, have the search results displayed on the dashboard.

To show a list of opportunities on your dashboard:

1. Go to Home, and click **Personalize Dashboard**.

2. In the Add Content pane, under Standard Content, click **Custom Search**.

3. In the **Custom Search Portlet**, click **Set Up**.

4. In the **Search** field, select **Opportunities to Close This Week**.

5. Click **Save**.

Now, when the managers log in each day, they see a current list of opportunities that their sales reps expect to close during the next seven days. The managers review this information each morning with each of their sales reps.

Pipeline Reports and KPIs

NetSuite Reporting and Search tools help sales managers examine the reasons your sales team wins or loses deals. This information is essential for improving your team's strategy and product positioning. With NetSuite, you can report on the sales you lose and understand why you lose them.

To do this, you can use NetSuite search, built-in reports, dashboard KPIs, and report snapshots.

NetSuite includes reports that break down the pipeline by sales rep and customer and also show opportunities that have been won, lost, or that remain open. For example:

- **Pipeline by Sales Rep Summary / Detail** – These reports let you view the total open opportunities and estimates for each sales rep.

- **Pipeline by Customer Summary / Detail** – These reports present the total open opportunities and estimates for each customer.

- **Opportunities to Close Summary / Detail** – These reports show the projected and weighted totals of the opportunities that sales reps are still working to close.

You can view pipeline reports on the Reports page, under the Pipeline Analysis heading.

Opportunities and Search

You can also use NetSuite search tools to get the pipeline information you need to make sales decisions.

For example, Wolfe Electronics sales managers use the competitor information on opportunities to analyze lost deals. With an opportunity search, the managers can see which competitors the company is losing business to, allowing them and their reps to adjust their selling strategy.

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To create a list of lost opportunities:

1. Go to Opportunities > Opportunities > Search.
2. Click **Create Saved Search**.
3. Enter **Opportunities Lost to Competitors** in the **Title** field.
4. In the **Filter** column, select **Sales: Win/Loss Reason**.
5. In the popup, select **is lost to a competitor**.
6. Click **Set**.
7. In the **Filter** column, select **Sales: Actual Close**.
8. In the popup, select **within** and **this fiscal year to date.**
9. Click **Set.**
10. Click the **Results** subtab.
11. Click **Remove All.**
12. Click **Add Multiple**.
13. Hold **CTRL**, and select **Won By, Number, Sales Rep**, and **Projected Total**.
14. Click **Add.**
15. Click **Submit.**

These search results show all of the opportunities Wolfe Electronics lost this year to competitors. You can save these search criteria and view them later or you can export the results in spreadsheet format. You can also publish the search results to your Dashboard or to the Opportunities tab.

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Commissions

The most effective incentive for motivating your sales team is commission. With NetSuite, you can design complex, multi-tiered commission plans that complement your company's sales strategy.

The NetSuite sales compensation feature is seamlessly integrated with its accounting and payroll features. When deals are entered, commission is automatically calculated by the system. You do not have to work with complicated spreadsheets or import data between applications.

Your team benefits from this integration because they will know how much commission they have earned before they receive their commission checks. With their NetSuite dashboard, sales reps can view estimated and actual commission in real time. Commission KPIs are powerful and visible motivators for your team.

To begin using the Employee Commissions feature, have an administrator turn on the feature at Setup > Company > Setup Tasks > Enable Features. The feature is on the Employees subtab.

Dun & Bradstreet for NetSuite Integration

Dun & Bradstreet (D&B) for NetSuite Integration lets you use your D&B account to access subsets of D&B data within NetSuite. It enables you to add the DUNS number and other commercial information to existing entity records for leads, prospects, customers, and vendors. You can search for D&B records and retrieve data that you can use to create new entity records. It also includes validations to identify and prevent duplicate entity records from being created and matched with the same D&B reference record. To help maintain the quality of your NetSuite entity records, you have the option to update incorrect or incomplete records with select D&B data. For DNBi Risk Management for NetSuite subscribers, you can also apply for credit within your NetSuite account.

For more information, see the following topics:

- Using D&B Data Management for NetSuite
- Using DNBi Risk Management for NetSuite

Availability

SuiteApp availability

Dun & Bradstreet for NetSuite Integration is available as a SuiteApp. It is a public bundle that you can install in your NetSuite account. However, you must contact your NetSuite account manager first to get the credentials for setting up the SuiteApp in your account.

Feature availability

The features that you can access depend on the D&B SKU that you subscribe to.

- **D&B Data Management for NetSuite** - This SKU enables you to match and create entity records using D&B data.
- **DNBi Risk Management for NetSuite** - For subscribers of this SKU, you can create and submit credit applications for customers, leads, and prospects. Also, you have limited access to entity matching features.

> ⚠️ **Important:** Use of DNBi Risk Management for NetSuite requires that you have the following entitlements enabled in your D&B account: Core, Decision Maker, and DNBi NetSuite Integration. For more information, see the help topic Setting Up D&B Accounts and Preferences.

The following table shows the list of features available for D&B Data Management, DNBi Risk Management, or both.

Feature	Available for:	
	D&B Data Management for NetSuite	DNBi Risk Management for NetSuite
Batch matching	Y	N
Single entity matching (for vendors, customers, leads, and prospects)	Y	N
Access to the following D&B data subsets: Identity, Hierarchy, Firmographic, Diversity, Industry Codes	Y	N
Update of entity details with D&B data	Y	Y (1)

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Feature	Available for:	
Creation of new entity from D&B data	Y	Y (1)
Data monitoring	Y	N
Credit application with matching (for customers, leads, and prospects)	N	Y (1)
Credit request on sales orders	N	Y (1)
Request for more credit	N	Y
Access to DNBi Risk Management fields on the entity record	N	Y
D&B account authentication	Y	Y
D&B role permissions configuration	Y	Y
(1) For DNBi Risk Management for NetSuite, only the basic company profile information is available for the following features with matching: Creation of new entity and update of entity details with D&B data, Credit application with matching, and Credit request on sales orders.		

Limitations of D&B for NetSuite Integration

Be aware of the following limitations of D&B for NetSuite Integration:

- When matching or creating entity records, any equivalent entity in another subsidiary not accessible to the user is not detected as a duplicate. However, duplicates are not allowed for entities that belong to the same subsidiary. You can have duplicate records only for entities that belong to different subsidiaries.
- Creating new entities from D&B records is not available for individual entities. Only companies are supported.
- Credit requests for sales order records generated through import are not supported.
- For Data Monitoring, updates for industry codes and DUNS transfers currently are not supported, including expired registrations.

Setting Up D&B for NetSuite Integration

- Setup Requirements for D&B for NetSuite Integration
- Common D&B Setup Tasks
- Setting Up D&B Data Management
- Setting Up DNBi Risk Management

Setup Requirements for D&B for NetSuite Integration

⚠️ **Important:** Before installing and setting up D&B for NetSuite Integration, be sure to get the credentials from your NetSuite account manager.

- Prerequisites for D&B for NetSuite Integration
- Installing D&B for NetSuite Integration
- D&B Roles and Permissions
- Using D&B Custom Entity Forms

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Prerequisites for D&B for NetSuite Integration

■ Enabling required features and preferences

Enabling required features and preferences

Before setting up D&B for NetSuite Integration, you must enable the required features and preferences. Go to Setup > Company > Setup Tasks > Enable Features.

■ On the **SuiteCloud** subtab, check the box for the following features:

☐ Custom Records

☐ Client SuiteScript

☐ Server SuiteScript

■ When using DNBi Risk Management, with or without D&B Data Management, you must enable the following:

On the **Accounting** subtab, check the box for **A/R** (Accounts Receivables).

For more information about enabling required features, see the help topic Enabling Features.

Installing D&B for NetSuite Integration

After you have enabled the required features, you can install the SuiteApp. Go to Customization > SuiteBundler > Search & Install Bundles. Look for the SuiteApp with the following details:

■ Bundle Name: **Dun & Bradstreet for NetSuite Integration**

For detailed instructions, see the help topic Installing a Bundle.

D&B Roles and Permissions

■ Understanding D&B Roles
■ Assigning D&B Record Permissions to Custom Roles
■ Configuring D&B Role Permissions

Understanding D&B Roles

D&B for NetSuite Integration uses the standard Administrator role for account setup, batch matching, and other D&B setup tasks. You can use the following custom roles for other tasks specific to the use of D&B features:

■ **D&B Buyer** - Use this role for Data Management tasks: single entity matching, creation, and update of vendor records with D&B data.

■ **D&B Sales Rep** - Use this role for Data Management tasks: single entity matching, creation, and update of lead, prospect, and customer records with D&B data. For DNBi Risk Management subscribers, this role can also be used for submitting credit requests for prospects, leads, and customers.

> ⓘ **Note:** Users with this role must be set as a sales representative in the employee record. To set up an employee, go to Lists > Employees > Employees, and then open the record to be updated. On the Employee record, click the **Human Resources** subtab and then check the **Sales Rep** box. For more information about this option, see the help topic Marking an Employee as a Sales Rep.

■ **D&B Sales Manager** - Use this role for Data Management tasks: single entity matching, creation, and update of lead, prospect, and customer records with D&B data. For DNBi Risk Management

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subscribers, this role can also be used for submitting credit requests and viewing of credit application details in NetSuite.

- **D&B Credit Manager** - Use this role for Risk Management tasks: credit application and viewing of credit application details in NetSuite and DNBi.

Click the following link to open the Microsoft Excel file that contains the list of D&B features that each D&B role can access by default: D&B Role Access Matrix.

To assign a D&B role to a user, see the help topic Assigning Roles to an Employee. If you want to set up your custom roles with the permissions assigned to D&B roles, see the following topics:

- Assigning D&B Record Permissions to Custom Roles
- Configuring D&B Role Permissions

Assigning D&B Record Permissions to Custom Roles

You can provide custom roles in the Classic, Accounting, and Sales centers, access to specific D&B records and features. Go to Setup > User Roles > Manage Roles, and then click the Edit link to open the role record. Refer to the following list of D&B records that you can assign to your custom role, based on your business requirements.

> ⓘ **Note:** You can give custom roles the same set of permissions as one of the D&B roles or provide access only to specific components of a D&B record. For more information, see the help topic Configuring D&B Role Permissions.

- On the **Permissions** subtab, click the **Custom Record** subtab and then assign the recommended level for the following:

Record	Recommended Level	Description
D&B Setup (1)	View	View D&B account setup and DNBi preferences.
D&B GUID (1)	View	View DNBi preferences.
D&B User	Edit	Set up DNBi user credentials.
D&B Process Status	Edit	View the list of D&B processes that have been run in the account. Edit select details of a process.
D&B Reference Record	Edit	View the list of D&B reference records matched with NetSuite entity records. Edit select details of a reference record.
D&B Role Permissions (2)	View	View predefined D&B Role Permissions records.
D&B Data Link – Industry Code	Edit	View the Industry Codes section on the D&B Information subtab of entity records.
D&B Master List – Industry Code	Edit	View the master list of industry codes that are used for D&B matching.
D&B Data Link – Registration Number	Edit	View the Registration Numbers section on the D&B Information subtab of entity records.

Record	Recommended Level	Description
D&B Credit Application	Edit	Create and view DNBi credit requests.
(1) Like the D&B Credit Manager role, you can assign similar custom roles access to set up the DNBi Risk Management preferences. Assign the Edit access level for the D&B GUID and D&B Setup permissions.		
(2) Assign the Edit level for D&B Role Permissions, to users who want to add roles to D&B Role Permissions records.		

- On the **Permissions** subtab, click the **Setup** subtab and then assign the recommended level for the following:

Record	Recommended Level	Description
Custom Lists	View	View D&B Role Permissions records.
SuiteScript	View	View D&B Role Permissions records.

- On the **Forms** subtab, click the **Custom Record** subtab and then check the **Enabled** box for the following forms:

Type	Form Name	Enabled
D&B Setup	Standard D&B Setup Form	Yes
D&B Process Status	Standard D&B Process Status Form	Yes
D&B Reference Record	D&B Reference Record (Quick View)	Yes
D&B Reference Record	Standard D&B Reference Record Form	Yes
D&B User	Standard D&B User Form	Yes
D&B Data Link – Registration Number	Standard D&B Data Link – Registration Number Form	Yes
D&B Data Link – Industry Code	Standard D&B Data Link – Industry Code Form	Yes
D&B Credit Application	Standard D&B Credit Application Form	Yes
D&B Role Permissions	Standard D&B Role Permissions Form	Yes
D&B Master List – Industry Code	Standard D&B Master List – Industry Code Form	Yes

> **Note:** Provide access for D&B Credit Application records and forms only to custom roles with tasks pertaining to creation or processing of D&B credit requests.

For more information about customizing roles, see the help topic Customizing or Creating NetSuite Roles.

Configuring D&B Role Permissions

D&B Role Permissions records contain D&B permissions that you can assign to multiple roles in your account. Each D&B role has a predefined record with default permissions for fields, buttons, and pages. Use these records to assign the same set of permissions to your custom roles.

- For more information about D&B roles, see the help topic Understanding D&B Roles.

- To view the list of default permissions on each predefined record, click the following link to open the Excel file: D&B Role Access Matrix. In the file, refer to the table on the **D&B Role Permissions Matrix** tab.

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Key points for using D&B Role Permissions records:

- You must provide custom roles access to the following standard and D&B records first before adding the roles to D&B Role Permissions records:
  - D&B Role Permissions
  - Custom Lists
  - SuiteScript
  - Standard permissions for entity records: customers, leads, prospects, or vendors

  For more information about providing access to D&B records, see the help topic Assigning D&B Record Permissions to Custom Roles. For information about enabling permissions for standard records, see the help topic Working with Records.

- When updating D&B Role Permissions records:
  - Update predefined records if you want to add your custom roles without changing the default set of permissions.
  - If you want to change the default permissions, you can make a copy of the predefined record, instead of updating it directly. For example, you want a custom role to have the same permissions as the D&B Credit Manager role, except the Edit permission for D&B Role Permissions records. On your copy of the D&B Credit Manager record, add the custom role and then deselect the permission, **Button - Edit Role Permission**.

    To make a copy, go to Dun & Bradstreet > Account Setup > Manage Role Permissions, and then click the View link for the predefined record. On the D&B Role Permissions page, click the Actions submenu, and then select Make Copy.
  - To prevent conflicting permission assignments, you cannot add the same role to multiple D&B Role Permissions records. When you create a copy of a record, be sure to remove roles that are selected on the original record.

To configure D&B role permissions:

1. Go to Dun & Bradstreet > Account Setup > Manage Role Permissions.
2. On the D&B Role Permissions list, click the Edit link for the record.

   ⚠️ **Important:** When in edit mode, be sure not to delete a predefined D&B Role Permissions record. If you delete a record, the associated D&B role loses default permissions that enable access to D&B records.

3. On the D&B Role Permissions page, you can update the following fields:

Field Name	Description
Name	Edit the name of the D&B Role Permissions record.
Inactive	Check this box if you want to inactivate the record. ⓘ **Note:** Roles associated with an inactive record are not granted access to the permissions selected on the record.
Roles	Select more roles that you want to assign the D&B permissions to. You can also deselect roles that you want the permissions to be removed from. Both custom and standard roles in your account are displayed in the list.
Custom Permissions	Select more D&B permissions to be assigned to the roles. You can also deselect permissions.

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Field Name	Description
	⚠ **Important:** NetSuite recommends that you do not update the default permissions of predefined records for D&B roles. Permissions cannot be reset or returned automatically after you have saved the record. Instead, you can make a copy of a predefined record if you want update the default permissions.
Has Customer Access	Check this box if you want to provide access to the D&B permissions for customers, leads, and prospects. ℹ **Note:** Enabling Customer Access does not automatically assign the standard permissions for customer records and lists. Verify that these permissions are enabled in the account. For more information, see the help topic Working with Records.
Has Vendor Access	Check this box if you want to provide access to the D&B permissions for vendors. ℹ **Note:** Enabling Vendor Access does not automatically assign the standard permissions for vendor records and lists. Verify that these permissions are enabled in the account. For more information, see the help topic Working with Records.

4. Click **Save**.

   Click **Reset** before saving if you want to remove your customizations and to return the default settings.

   To view the list of updates, open the D&B Permissions record in view mode, and then click the **System Notes** subtab. Look for the updated permissions or roles, including their old and new values.

Using D&B Custom Entity Forms

When entity records have been matched with D&B records, the following fields are shown in the Classification section:

- **DUNS Number** – This field displays the DUNS number associated with the entity. Clicking the link opens the D&B Reference Record that has been matched with the entity record.
- **D&B Last Match Date** – This field displays the date when the entity has been matched with the D&B record.
- **Monitoring Status** – This field displays the latest registration status for data monitoring from D&B.

To show the D&B fields in their own section, you can use these custom entity forms:

- **D&B Vendor Form** - Use this form for vendor records.
- **D&B Customer Form** - Use this form for customer, lead, or prospect records.

Refer to the screenshot of the Dun & Bradstreet section and fields shown on both custom forms.

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DUNS NUMBER	D&B LAST MATCH DATE	MONITORING STATUS
187505206	11/23/2016 9:18:37 am	Pending

Setting D&B custom entity forms as preferred

You can set the D&B custom entity forms as preferred by going to Customization > Forms > Entry Forms. On the Custom Entry Forms page, check the **Preferred** box for the forms, and then click **Submit**.

For more information about setting up preferred forms, see the help topic Defining Preferred Forms.

Displaying D&B fields on custom forms

If you have your own custom entity forms, you can update them to show the D&B fields. Go to Customization > Forms > Entry Forms. On your custom entity form, look for the D&B fields on the **Fields** subtab. Do the following for each field:

- Check the box in the **Show** column.
- Select **Inline Text** from the list in the **Display Type** column.
- Select **Dun & Bradstreet** from the list in the **Field Group** column.

For more information about setting up fields on custom forms, see the help topic Configuring Fields or Screens.

Common D&B Setup Tasks

After enabling the required features, installing the SuiteApp, and assigning permissions, you can proceed to the setup tasks for D&B for NetSuite Integration.

For tasks that apply to both D&B SKUs, see the following subtopics:

- Setting Up D&B Accounts and Preferences
- Defining D&B Saved Searches

For tasks specific to each D&B SKU, refer to the sequence of tasks in the following topics:

- Setting Up D&B Data Management
- Setting Up DNBi Risk Management

Setting Up D&B Accounts and Preferences

For administrators, you must enter and verify the credentials for your D&B account. Also, you can enable D&B preferences according to your business requirements.

Key points for setting up D&B accounts in NetSuite:

- You set up both D&B SKUs in your NetSuite account: D&B Data Management for NetSuite and DNBi Risk Management for NetSuite. If there are features available in both SKUs, the implementation for D&B Data Management is followed. To view the list of available features per D&B SKU, see the help topic Availability.

- For DNBi Risk Management subscribers, testing your credentials displays the status of your DNBi entitlements. To use the features of D&B for NetSuite Integration, you must have the following entitlements enabled: Core, Decision Maker, and DNBi NetSuite Integration. If any of these entitlements are not enabled, you may contact NetSuite Support to verify your account.

To set up D&B accounts and preferences:

1. Go to Dun & Bradstreet > Account Setup > Manage D&B Preferences.
2. On the Manage D&B Preferences: Encryption Key page, set up the encryption key:
   a. In the **Secret Key** field, enter a 16–character secret key.

      The secret key is used to encrypt the D&B API Key for the account. You need to set up the encryption key one time only.

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b. Click **Save**.

3. On the Manage D&B Preferences page, set up your D&B accounts.

- Set up data management on the **D&B Data Management** subtab:

  □ On the **Data Management** subtab, do the following:

  - Check the **Enabled** box.

  - Enter your user ID and password for the D&B Data Management for NetSuite account.

    ⚠️ **Important:** If you use the Data Monitoring feature, do not change the user ID or replace the D&B account that has been set up for D&B Data Management for NetSuite.

  □ Optionally, on the **Data Monitoring** subtab, you can do the following:

  - Check the **Enabled** box.

    ℹ️ **Note:** You cannot disable D&B Data Management while Data Monitoring is still enabled. If you want to pause tracking and automatic updates of registered D&B reference records, clear the **Enabled** box for Data Monitoring. For more information about this feature, see the help topic Using Data Monitoring for D&B Reference Records.

    Enabling this preference for the first time in the account automatically creates the monitoring and notification profiles.

    ⚠️ **Important:** Because Data Monitoring can be set up only one time per account, do not change the user ID or replace the D&B account that has been set up for D&B Data Management for NetSuite.

  - If you have enabled Data Monitoring, you can check the **Automatic Register for Matched Entities** box to enable automatic registration of matched entities.

    This preference is applicable to the matching features within D&B Data Management only: batch matching, record linking for entities with multiple matches, single matching on entity records, and creation of entity records through matching.

  - You can specify the duration that the Data Monitoring component will backtrack to retrieve updates to registered D&B reference records. To do this, click Edit and then go to the **Data Monitoring** subtab. In the **Number of Days to Retrieve Updates** field, enter the number of days that you want Data Monitoring to backtrack and retrieve updates. For example, you entered 10, the system will retrieve updates starting from the past 10 days up to the current date.

- Set up risk management on the **DNBi Risk Management** subtab:

  □ Check the **Enabled** box.

  □ Enter your user ID and password for the DNBi account.

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□ Select the preferences that you want to enable:

- **Automatically request credit for new customers, leads, prospects**

  Check this box if you want to automatically submit credit requests when creating customers, leads, and prospects with matching. For more information, see the help topic Applying for Credit for Entities.

- **Automatically request credit upon sales order creation**

  Check this box if you want to automatically submit credit requests on new sales orders. For more information, see the help topic Applying for Credit on Sales Orders.

- **Overwrite NetSuite credit limit and terms**

  Check this box if you want to overwrite the entity's credit limit and terms in NetSuite with DNBi values from your credit request results.

  > ⚠️ **Important:** When you use the Overwrite NetSuite credit limit and terms preference, you must have Edit permission to the entity records. For information about roles and permissions, see the help topic Customizing or Creating NetSuite Roles.

  The overwrite takes effect when the status of the credit application is Approved or Approved-Additional Credit Requested.

  □ The NetSuite credit limit is replaced with the recommended credit limit from D&B.

  □ The NetSuite term is replaced based on the DNBi term and discount combination. For more information, see the help topic Creating Term Records for DNBi Terms and Discounts.

  Because these are default settings on the entity record, transactions that use credit limits and terms are automatically populated with these values during creation.

  When a credit application is declined, the NetSuite credit limit and D&B recommended credit limit are both set to zero. Also, the NetSuite **Terms** field is left blank when the DNBi payment term is any one of the following: CIA, Pre-pay, and Credit.

4. Click **Save**.

   After saving the record, click **Test Data Management Credentials** or **Test Risk Management Credentials** to validate the user ID and password. These test buttons are available in view mode only.

   > ℹ️ **Note:** If you have repeatedly attempted to test the credentials with an invalid user ID or password, you may be locked out of the D&B account.

To set up DNBi user credentials:

For DNBi Risk Management users, you can set up the credentials for your own DNBi account in NetSuite. You can have access to the DNBi account where you can view your own credit requests. If you do not have your own DNBi account, you can gain access to credit applications through the DNBi credentials provided by the administrator. For more information, see the instructions to set up D&B accounts and preferences in this section.

> ℹ️ **Note:** If you do not set up your DNBi credentials, you are prompted to enter them when you try to use the credit application link on sales orders and entity records.

1. Go to Dun & Bradstreet > Account Setup > Manage DNBi User Credentials.
2. On the Manage DNBi Credentials page, click **Edit**.

3. Enter the user ID and password for your own DNBi account.

4. Click **Save**.

5. Click **Test DNBi User Credentials** to validate your credentials.

Defining D&B Saved Searches

Use saved searches to track the status of credit applications, entity matching processes, and reference record updates. You can use the predefined D&B saved searches or define your own according to your business requirements.

- Setting Up Predefined D&B Saved Searches on a Dashboard
- Defining Saved Searches for Data Monitoring

Setting Up Predefined D&B Saved Searches on a Dashboard

Set up the predefined D&B saved searches in custom search portlets on the Home or Dun & Bradstreet dashboard:

- To set up portlets on the Home dashboard, click the Home icon and then click **Dashboard**.
- To set up portlets on the Dun & Bradstreet dashboard, go to Dun & Bradstreet > Dun & Bradstreet Overview. This dashboard is available to roles in the Classic, Accounting, and Sales centers.

For instructions on setting up portlets, see the following topics:

- Displaying Multiple Saved Searches on Your Home Page
- Adding a Portlet to a Dashboard
- Setting Up Dashboard Portlet Content

You can set up the following D&B saved searches in custom search or reminders portlets:

- **My DNBi Credit Applications**

  This portlet displays all credit applications that you have created and submitted in the account.

- **DNBi Credit Application for Review**

  This portlet displays all credit applications in your account for review. Click the View link for a record to view the credit application details.

- **D&B Process Status**

  For administrators, this portlet displays the status of processes that have been run in the account. Click the View link to open and view the D&B Process Status record.

  The list in the portlet can also be displayed by going to Dun & Bradstreet > D&B Schedules > View Process Status.

> ⓘ **Note:** You can create a copy of the saved searches to set up email notification before using them in a portlet. Go to Lists > Search > Saved Searches. On the Saved Searches list, click the Edit link for the saved search. On the saved search record, click the **Email** subtab and then add the recipients of the email notification. Click **Save As** to save your copy. For more information, see the help topic Enabling Saved Search Scheduled Email.

After setting up the portlets, you can publish the dashboard to apply the changes to user's dashboards. For more information, see the topics in Publishing Dashboards Overview.

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The following screenshot shows a sample DNBi Credit Application for Review custom search portlet.

Defining Saved Searches for Data Monitoring

Create saved searches to track the registration status and reference record updates pertaining to D&B Data Monitoring. You can set up your saved search in a portlet to display the results on a dashboard.

To define saved searches for Data Monitoring:

1. Go to Lists > Search > Saved Searches > New.

2. From the New Saved Search list click the D&B Reference Record link.

   For administrators, you can create a saved search that retrieves all logs on Data Monitoring updates. If you want to create this saved search, click the Server Script Log link. For more information, see the help topic Saved search filter for retrieving logs on D&B updates.

3. On the Saved D&B Reference Record Search page, enter the following settings:

   - On the **Criteria** subtab, add the filters for the saved search you want to create. For the list of filters per saved search, see the help topic Saved search filters for D&B Data Monitoring.

   - On the **Results** subtab, set the fields to be used for the results based on your saved search:

   > ⓘ **Note:** Aside from setting the column fields in the table, you can also add or remove those that you do not want to display in the results.

Column Fields	Values
DUNS Number	Summary Type: **Group**
Business Name	Summary Type: **Group**
System Notes Fields (1)	Field: **Field**
System Notes Fields (1)	Field: **Old Value**
System Notes Fields (1)	Field: **New Value**
(1) These System Notes Fields are applicable for Saved search filters for retrieving D&B reference records with updates. They are used to display the old and new values of updated fields.	

- If you want users to receive email alerts, set the following on the **Email** subtab:

  □ Check the box: **Send email alerts when records are created/updated**

  > ⓘ **Note:** Be aware that enabling this preference sends an email notification when D&B reference records are created during batch matching. For more information about email alert settings, see the help topic Enabling Saved Search Email Alerts.

  □ On the **Specific Recipients** subtab, add the recipients. To receive alerts when records are updated, check the following boxes: **Send on Update** and **Show Recent Changes**. For more information about email alert settings, see the help topic Enabling Saved Search Email Alerts.

  If you want to further customize your saved search, see the help topic Defining a Saved Search.

4. Click **Save** to save the record, or click **Save & Run** to save the record and then run the saved search.

   After creating a saved search, you can set it up in a portlet to display the results on dashboards. For more information, see the help topic Setting Up Predefined D&B Saved Searches on a Dashboard.

Saved search filters for D&B Data Monitoring

This section contains the list of basic filtering criteria for saved searches that you can set up for D&B Data Monitoring.

Saved search filters for retrieving D&B reference records with updates

Add the following filters to create a saved search that displays a list of D&B reference records with updates:

Filter Fields	Values
System Notes Fields	Filter: **Context** Context: **any of**, **Script (Suitelet)**

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Filter Fields	Values
System Notes Fields	Filter: **Type** Type: **Change**
System Notes Fields	Filter: **Field** Field: **none of**, **Monitoring Status**

Saved search filter for retrieving D&B reference records that failed the registration

Add the following filter to create a saved search that displays a list of all D&B Reference Records with **Failed** monitoring registration status:

Filter Fields	Values
Monitoring Status	Status: **any of**, **Failed**

Saved search filter for retrieving logs on D&B updates

For administrators, add the following filter to create a saved search that displays a list of all script execution logs on D&B updates:

Filter Fields	Values
Name	Name: **contains**, **ChangeNoticeProcessId**

> **ⓘ Note:** The retrieved logs on D&B updates include new field values only by default, without the old values. For more information about logs on D&B updates, see the help topic Viewing D&B Updates in Logs.

You can add more filters to further refine your list. For more information, see the help topic Defining a Saved Search. After adding the filtering criteria, you can continue setting up your saved search and enabling other settings. For more information, see the help topic Defining Saved Searches for Data Monitoring.

Setting Up D&B Data Management

Follow the sequence of tasks to set up D&B Data Management and its features, some of which are optional or based on your business requirements:

1. Setup Requirements for D&B for NetSuite Integration
2. Setting Up D&B Accounts and Preferences
3. Creating Deployments for Batch Matching
4. Defining D&B Saved Searches

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Creating Deployments for Batch Matching

With D&B Data Management for NetSuite, you can search for D&B records or candidates to be matched with NetSuite entities using script deployments.

Batch matching uses the default script deployment named **DNB MR Match**. You can create new batch matching deployments based on the default, with your own specifications. Separate deployments can be created, for example, to match records of a particular entity type. Based on your business requirements, you can also change the deployment schedule.

Understanding the Batch Matching Criteria

Batch matching applies the following criteria to search for matching D&B records or candidates:

- Company name
- Address
- Telephone number
- Confidence code

Considerations in Setting the Confidence Code as Criteria

Automatic matching is done if the confidence code of the D&B record is equal to or greater than the Auto Accept Confidence value that you set as criteria for batch matching.

A D&B record with a confidence code that is less than the Auto Accept Confidence value set in the criteria will be included as candidate match.

If Auto Accept Confidence code is not set, all D&B records returned will be queued as candidate matches.

> (i) **Note:** Batch matching returns one candidate match per record. A reference record is created for that candidate match.

Conditions and results in setting the Auto Confidence Code criteria:

Auto Confidence Code Criteria	Confidence Code of the D&B Record	Result
When set	Is equal or higher	Automatic match
When set	Is lower	Queued for review
When not set	Is equal, higher or lower	Queued for review

To create a script deployment for batch matching:

1. Go to Dun & Bradstreet > D&B Schedules > Batch Schedules.
2. On the D&B Batch Schedules list, click **New Schedule**.
3. On the Script Deployment page, you can do the following:
    - Set the deployment status and enter other deployment details.

      For detailed instructions, see the help topic Steps for Defining a Script Deployment.

      Be sure to set the appropriate deployment status before saving the record. For information about the deployment status, see the help topic Understanding Scheduled Script Deployment Statuses.

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- On the **Schedule** subtab, set your preferred schedule of deployment.

> (i) **Note:** D&B script deployments can be run only one at a time. When you create multiple deployments, you can set the schedules to run at different times. For more information about schedules, see the help topic When Will My Scheduled Script Execute?

- On the **Parameters** subtab, set the following:
  - In the **Entity Type** field, select the entity type of the records to be included in batch matching.
  - Optionally, you can add the following filtering criteria for batch matching:

Field Name	Description
Entity Status	Select the status specific to the entity type.
Subsidiary	For OneWorld accounts, select the subsidiary of the entity records to be included in the batch.
Group	Select the group from which records are selected. (i) **Note:** If you add a group filter, selections for the entity type, status, and subsidiary are not considered during batch matching.
Auto Accept Confidence	Select the minimum confidence code, from 4 to 10, which a D&B reference record should have, to be automatically matched with an entity.
Process ID	The Process ID is automatically generated. Leave this field blank.

4. Click **Save**.

    The new script deployment is added to the list on the Batch Schedules page. For information about running the deployment that you have set up, see the help topic Running Batch Matching.

Setting Up DNBi Risk Management

Follow the sequence of tasks to set up DNBi Risk Management and its features, some of which are optional or based on your business requirements:

1. Setup Requirements for D&B for NetSuite Integration
2. Creating Term Records for DNBi Terms and Discounts
3. Setting Up D&B Accounts and Preferences
4. Setting Up Web Service Integration in DNBi
5. Scheduling Credit Request Updates for Syncing Failures
6. Defining D&B Saved Searches

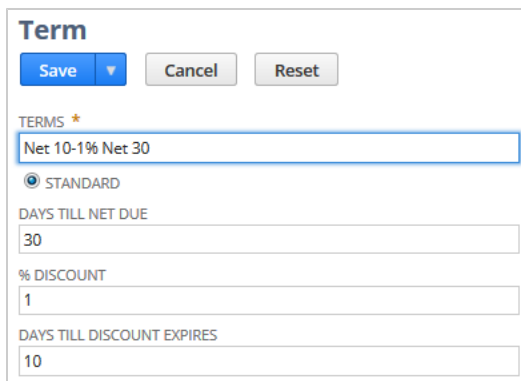## Creating Term Records for DNBi Terms and Discounts

For subscribers of DNBi Risk Management for NetSuite, you can use the same payment terms and early payment discounts that have been set up in your DNBi account. In NetSuite, you can assign payment terms on sales order transactions or set them as the default term on entity records.

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> **Note:** If you want to use the Overwrite NetSuite credit limit and terms preference, you must create a term record for each discount and payment term combination used in your DNBi account. NetSuite recommends that you create the term records before setting up your account.

Review the guidelines specific for creating term records for DNBi payment terms and discounts:

- To create term records, go to Setup > Accounting > Setup Tasks > Accounting Lists. For instructions on creating NetSuite terms, see the help topic Creating Terms of Payment.

  When assigning names for the NetSuite terms, combine the DNBi early payment discount and payment term values. For example, set up a NetSuite term named **Net 10–1% Net 30** for the following DNBi combination: early payment discount of **Net 10–1%** (with 10 as the number of days till the 1% discount expires) and payment term of **Net 30**.

> **Important:** When using the Overwrite NetSuite credit limit and terms preference, you must strictly follow the naming convention: early payment discount value followed by payment term value, with one space in between the values. If no matching NetSuite term could be found, the DNBi term and discount from your credit request results cannot automatically be applied to the entity.

- Using the Overwrite NetSuite credit limit and terms preference, the selection in the **Terms** field on entity records is automatically overwritten with the NetSuite term that matches the DNBi discount and term combination.

  - For cases where DNBi payment terms are returned with no corresponding discount, be sure to create a term record with a name that uses only the payment term value. The **% Discount** field must be left blank.

  - For cases where DNBi discounts are returned with no corresponding payment term, be sure to create a term record with a name that uses only the discount value. The **Days Till Net Due** field must be left blank.

  - You do not need to create term records for DNBi payment terms used for declined credit requests. Examples of these DNBi payment terms include CIA, Pre-pay, and Credit.

  For more information about the preference, see the help topic Setting Up D&B Accounts and Preferences. For more information about viewing credit request results, see the help topic Viewing and Processing Credit Applications.

- On sales order transactions, you can assign the payment term on the **Billing** subtab. For prospects and customers, you can set a default term on the entity record. For more information about assigning payment terms, see the following topics:

  - Using Terms of Payment

  - Adding Billing Information to a Transaction

Setting Up Web Service Integration in DNBi

For administrators, you must set up outbound services in your DNBi account to enable automatic updates of credits requests in NetSuite. Use the same DNBi account that you have set up for DNBi Risk Management. For more information about setting up DNBi accounts in NetSuite, see the help topic Setting Up D&B Accounts and Preferences.

To set up web service integration in DNBi:

1. Go to Customization > Scripting > Script Deployments.
2. On the Script Deployments list, click the View link for the **DNB SU Process DNBi Update** script.
3. On the Script Deployment page, copy the link in the **External URL** field.
4. Follow the steps to add the link when you set up outbound services in your DNBi account:
   a. Log in as administrator to your DNBi account.
   b. In the **DNBi** field, located at the upper right side of the page, select **Integration Administration** and then click **Go**.
   c. On the DNBi Integration Admin page, click **Automated Tasks**.
   d. On the **Web Services** subtab, click **Edit** for Enable Outbound Services.
   e. In the Set Up Contract section, enter the following details:
      - In the **Client ID** field, enter or verify the user ID for the DNBi account.
      - In the **Endpoint URL** field, enter or paste the External URL that you copied from the NetSuite script.
   f. In the Set Up Action Triggers section, for Decision Maker, select the action triggers that you want to enable based on your business requirements.

      For example, if you want to send an outbound notice when credit requests are approved, you can select the **Approve** option.
   g. Click **Save**.

Scheduling Credit Request Updates for Syncing Failures

Syncing credit applications that have been updated in DNBi (https://na3.dnbi.com) and the corresponding NetSuite credit application records may encounter errors during processing. Failed updates are automatically reprocessed by the DNB SU Process DNBi Update script on an hourly basis. For administrators, you can change the default schedule of the deployment based on your business requirements.

To schedule updates for failed credit requests:

1. Go to Customization > Scripting > Script Deployments.
2. On the Script Deployments list, click the Edit link for the **DNB MR Sync Credit** script.
3. On the Script Deployment page, change the settings on the **Schedule** subtab.

   For information about scheduling script deployments, see the following topics:
   - When Will My Scheduled Script Execute?
   - Scheduled Script Best Practices
4. Click **Save**.

   The DNB MR Sync Credit script locates all failed credit application updates using the Need Sync flag on the D&B Credit Application record. To view this record, go to Lists > Search > Saved Searches. On the Saved Searches list, click the View link for DNBi Credit Application for Review. On the results page, click the View link for the credit application record. On the D&B Credit

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Application page, the **Need Sync** box is checked when an attempt to update it has failed. This box is cleared again when the update has been processed successfully.

Alternatively, you can set up the DNBi Credit Application for Review saved search as a custom search portlet. You can view credit application records on the Home or Dun & Bradstreet dashboard. For more information, see the help topic Defining D&B Saved Searches.

Using D&B Data Management for NetSuite

For subscribers of D&B Data Management for NetSuite, NetSuite entity records can reference a D&B master record and can be updated with select firmographic data from D&B. You can also create lead, prospect, customer, and vendor records using D&B data.

> **Note:** Matching, creating entity records, and updating entity records are also available for DNBi Risk Management for NetSuite subscribers, with limited access to D&B data. To view the list of features per D&B SKU, see the help topic Availability.

- Matching with D&B Reference Records
- Creating Entity Records Using D&B Data
- Updating Entity Details with D&B Values
- Using Data Monitoring for D&B Reference Records

Matching with D&B Reference Records

Entity records that belong to different subsidiaries can be matched with the same D&B reference record. Entity records with multiple possible matches are included in the list of unmatched entities. You can select which D&B reference record to match with the entity.

- Running Batch Matching
- Viewing the Batch Matching Status
- D&B Process Status
- Matching Entities to D&B Reference Records
- Matching Existing Entities to D&B Records
- Viewing Matched Records
- Removing Candidate Matches from Entity Records

Running Batch Matching

Batch matching includes only entity records that are not yet associated with a DUNS number. Records that are already associated with candidate matches are excluded from batch matching. You can run batch matching only one at a time. You cannot run the same deployment again, if one is still in progress.

Batch Matching on Demand

To run the default scheduled script for batch matching:

1. Go to Dun & Bradstreet >D&B Schedules > Run Batch Schedules.
2. On the Run Batch Matching page, enter appropriate values in any of the following filters to define the batch you want to match:
   - Subsidiary

- Entity Type
- Entity Status
- Group

> **Note:** You can use Subsidiary, Entity Type and Entity Status in combination, as they work together. The Group filter works separately, if you select a value for Group, the system will only accept the Group filter and reject the other three filters.

3. After defining the batch, select a value for Auto Accept at Confidence criteria. Select a value from a confidence code range of 4 to 10. The value you select will be the basis for matching the batch of entities to D&B reference records.

> **Note:** If you do not define any filters or criteria, the system will process all existing entities and then assign candidate matches to them.

For more information the confidence code criteria, refer to the table in Understanding the Batch Matching Criteria.

4. Click **Run**.

The D&B Process Status page is displayed where you can view the runtime status and verify that batch matching has been completed. For more information, see the help topic D&B Process Status.

To select and run a batch matching script deployment that you have set up:

1. Go to Dun & Bradstreet > D&B Schedules > Batch Schedules.
2. On the D&B Batch Schedules page, in the Select column, choose the radio button of the deployment that you want to run.
3. Click **Run Now** to run the selected deployment.

The D&B Process Status page is displayed where you can view the runtime status and verify that batch matching has been completed. For more information, see the help topic D&B Process Status.

Batch Matching on Schedule

When deployed, batch matching scripts automatically run according to their defined schedule. You can edit a script deployment to adjust its schedule for batch matching according to your business need.

To edit a script deployment to adjust its schedule for batch matching:

1. Go to Dun & Bradstreet > D&B Schedules > Batch Schedules.
2. On the D&B Batch Schedules page, in the Schedules list, click the Edit link of the deployment schedule you want to edit.
3. On the Script Deployment page, edit as necessary the script details and settings on the **Schedule** and **Parameters** subtabs.

For more information about D&B script deployments, see the help topic Creating Deployments for Batch Matching.

Viewing the Batch Matching Status

When a deployment runs on-demand or on schedule, you can view the runtime status by going to Dun & Bradstreet > D&B Schedules > View Process Status. On the D&B Process Status: Results page, you can see the runtime status and other details for each deployment.

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- You can monitor deployments in **Queued** or **In Progress** status.

- You can view the run start date and time, and the end date and time.

- For completed runs, the **Record Count** column shows the number of processed records. To view the entity records with candidate matches, go to the **Audit Logs** subtab in the D&B process status record. To view the number of matched entity records, go to the **Confidence Code Summary** subtab in the D&B process status record. For more information, see the help topic D&B Process Status. For entities that have not been matched, you can select the D&B record of the matched candidate stored locally.

- For failed runs, you can do the following:

  □ Change the filtering criteria and other deployment details. For more information, see the help topic Creating Deployments for Batch Matching.

  □ Rerun the failed batch matching process. For instructions, see the help topic Running Batch Matching.

D&B Process Status

D&B process status records contain information about the batch matching processes that were run. You can open a D&B process status record by clicking its View link on the D&B Process Status: Results page. On the D&B Process Status page, the following details are indicated:

- ID
- Process Name
- Status
- Record Count – indicates the total entities captured with the defined filters
- Fail Count
- Run Date
- Start Date
- End Date
- Results
- Notes – indicates the parameters used in the process
- User – indicates the user who ran the process
- User Email

If the process failed, the error is displayed in the **Results** field.

In the **Audit Logs** subtab, click the link under Filename to download a CSV file containing detailed information about the batch matching results.

> ℹ **Note:** For each file, the file size of audit logs is limited to around 9.5 MB.

In the **Confidence Code Summary** subtab, the number of candidate matches under each confidence code is indicated.

> ⚠ **Important:** In order for the Confidence Code Summary to display accurate information, the MR script must be in a single queue.

To set the Confidence Code Summary for a multiqueue account, configure the DNB MR Match script to use only a single queue:

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1. Go to Customization > Scripting > Script Deployments.

2. Click the Edit link of the DNB MR Match script.

3. On the Script Deployment page, clear the box for Queues – Select All.

4. Select Queue 1.

5. Click **Save**.

Matching Entities to D&B Reference Records

After batch matching, each entity will have a single candidate D&B match. This candidate is displayed on the Select D&B Reference Match page, where you have the option to match the entity to the candidate, get more candidate matches, remove the candidate D&B match, or cancel to leave the page.

To match a single entity to a D&B reference record:

1. Go to Dun and Bradstreet > List > Matched Candidates for Review.

2. On the Matched Candidates for Review page, you can do the following to find an entity record from the list:

   ■ By default, records of all entity types are displayed in the list. If you want to filter the list, use the Run Date From, Run Date To, or Entity Type criteria. When you enter a value for a filter, the page automatically refreshes with search results.

   ■ If there are a number of entities in the list, select a range of matched candidates from the **Page List** field to view the next or previous set of candidates.

3. On the Matched Candidates for Review page, click the View link of an entity record.

   The Select D&B Reference Match page is displayed with one candidate whose confidence code is closest to the auto confidence code set in the batch matching criteria.

4. On the Select D&B Reference Match page, choose the radio button of the D&B candidate to be matched with the entity record.

   If you want to view more matches, click **Get More Matches**. The Update Customer: Search D&B page is displayed, with new candidate D&B matches added in the results list.

   Choose the **None of the above** radio button if the candidate is not a match or if you do not want to link the entity to the candidate D&B record. The entity record is removed from the list of the Matched Candidates for Review page. The None of the above radio button and the Remove button on the Remove Review Candidates page perform the same action.

5. Click **Match Record**.

   The entity is automatically linked to the D&B reference record. You can view the D&B data on the entity record. For more information, see the help topic Viewing Matched Records.

   Click **Cancel** if you want to return to the Matched Candidates For Review page.

Matching Existing Entities to D&B Records

Existing entity records can be matched, one at a time, to D&B records.

To match existing entities to D&B records:

1. Go to Lists > Relationships > (Entity).

2. On the entity list, click the View link to open the record.

3. On the entity page, click **Match via D&B**.

   The D&B Reference Match page is displayed, where you can view the list of D&B records that can be matched to the entity.

   If there is no match, click **Cancel** to return to the entity page.

4. In the **Select** column, choose the D&B record.

   > ⓘ **Note:** Choose **None of the above** if there is no matching D&B record or if you do not want to link the entity to a D&B record.

5. Click **Match Record**.

   You can view the D&B data on the entity record. For more information, see the help topic Viewing Matched Records.

Viewing Matched Records

- **Viewing Matched D&B Reference Records**

  To view the list of matched D&B reference records, go to Dun and Bradstreet > List > D&B Reference Records. On the list of records, you can determine from the **Is Customer** and **Is Vendor** columns if the D&B reference record has been tagged or linked to a NetSuite customer (including lead or prospect), vendor, or both.

  > ⚠ **Important:** You must not delete D&B reference records. Linked reference records contain D&B data that are used for NetSuite entities. Unlinked reference records are used as candidate matches for NetSuite entity records.

  > ⓘ **Note:** Entities of different types that use the same D&B record are not created separate D&B reference records. For example, creating a vendor using a D&B reference record that has been associated with a customer only tags the existing D&B reference as a vendor. No new D&B reference record is created for the vendor.

  From the list, click the View link for the reference record that you want to open for viewing. The record displays the D&B details of the organization or entity.

- **Viewing the D&B Data of Matched Entity Records**

  Matched entity records can be viewed through the regular NetSuite navigation path: Lists > Relationships > (Entity). On the list of leads, prospects, customers, or vendors, the following columns are added: **DUNS Number** and **D&B Last Match Date** columns. These fields are also shown on the entity page. The DUNS number is displayed as a link that you can click to open the D&B reference record that has been matched with the entity.

  On the **D&B Information** subtab, more details are displayed under **Identity**, **Hierarchy**, **Firmographic**, and **Diversity**.

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On the **Identity** and **Firmographic** subtabs, you can also view the following sections:

▫ Registration Numbers – On the **Identity** subtab, this section displays the list of registration types and numbers assigned to the organization.

▫ Industry Codes – On the **Firmographic** subtab, this section displays the list of industry type codes and industry codes with description assigned to the organization. For industry type codes associated with multiple industry codes, only the first industry code based on the display sequence value is included in the list.

> ⓘ **Note:** For permissions required to view industry codes and registration numbers, see the help topic D&B Roles and Permissions.

Removing Candidate Matches from Entity Records

If a batch of entities was matched incorrectly or you want to change the matching criteria, you can unmatch or remove the candidate matches from the batch of entity records they were associated with. After batch removal of candidate matches, you can run a new matching process for the same batch.

To remove candidate matches from entity records in batches:

1. Go to Dun & Bradstreet > D&B Schedules > Remove Review Candidates.

2. On the Remove Review Candidates page, enter appropriate values in any of the following criteria to define the batch you want to unmatch:

   ▪ Subsidiary

   ▪ Entity Type

   ▪ Entity Status

   ▪ Group

   > ⓘ **Note:** You can use Subsidiary, Entity Type and Entity Status in combination, as they work together. The Group filter works separately, if you select a value for Group, the system will only accept the Group filter and reject the other three filters.
   >
   > If you do not define any criteria, the system will remove the candidate matches of all entities that are pending review.

3. Click **Remove**.

   The D&B Process Status page is displayed with details of the unmatching process. For more information, see the help topic D&B Process Status.

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Creating Entity Records Using D&B Data

Search for the record to be used for the new entity, directly from the D&B database. Create new customer, lead, prospect, and vendor records, one at a time, from the D&B record that you select. You can assign the entity type, subsidiary, or both for each single or batch process. The newly created entity records are enriched with D&B data, which includes the DUNS number, contact details, and other commercial information.

> **ⓘ Note:** If you subscribe to DNBi Risk Management for NetSuite, you can set a preference to automatically send a credit application when you create entity records. For more information, see the help topic Setting Up D&B Accounts and Preferences or Applying for Credit for Entities.

To create entity records using D&B data:

1. Go to Lists > Relationships > (Entity) > New.
2. On the entity record, click **Create via D&B Match**.
3. On the create entity page, enter your criteria to search for matching D&B records.

    You can use any of the following criteria:

    - DUNS number alone
    - Company name and country with address, city, state, or phone.

    > **ⓘ Note:** To search for companies in the U.S., enter the country, and then select the state. It narrows down the results and improve your chances of getting an exact match. Generally, match results with a confidence code of 8 and above are considered very close matches.

    > **⚠ Important:** If you subscribe to Using DNBi Risk Management for NetSuite and you do not subscribe to D&B Data Management for NetSuite, only the following criteria can be used in searching: Company Name, Country, State, Address 1, and City.

    For more information about each field or search criteria, see the following table:

Field Name	Description
DUNS Number	Enter the complete DUNS number.
Company Name	Enter the complete or partial company name.
Country	Enter the country name. When you have entered at least 3 characters, you can select from results displayed below the field. This field does not accept the country code.
State	Enter the state name. This field accepts U.S. state codes.
Address 1	Enter the complete or partial address.
City	Enter the city name.
Phone	Enter the telephone number for the company.

4. Click **Search**.

    View the list of D&B records that match the criteria on the **Search Results** subtab. The list displays the DUNS number, company name, complete address, and phone number.

    Click **Reset Criteria** if you want to clear all the search fields.

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5. On the **Search Results** subtab, do the following:

   a. For NetSuite OneWorld accounts, in the **Subsidiary** field, select the subsidiary to be associated with the new entities.

   > ⓘ **Note:** For each entity type, you cannot create duplicate records within the same subsidiary.

   b. In the **Select** column, choose the company record.

   Search Results ▪

   To create a customer record: Enter values for the required entity fields, select a company, and click the Create button.

   SUBSIDIARY *

SELECT	DUNS NUMBER	CONFIDENCE	COMPANY NAME	FAMILY TREE MEMBER ROLE	ADDRESS	PHONE ▴
⚪	027370027	4.0	COMPANY, THE		3817 CLERMONT DR	12345678
⚪	052992711	4.0	COMPANY THE		140 SAINT J	22538326
⚪	064724050	4.0	COMPANY THE		2955 RIDGELAKE	1212121212

   c. Click **Create**.

   > ⓘ **Note:** You cannot create records with the same DUNS number and subsidiary. For vendors, in particular, you cannot create records with the same company name, regardless if the DUNS number or subsidiary are different. If you select a D&B record that has been matched with an entity, a message is displayed with the record ID of the entity. You can click the record ID to view the entity details.

   After the record has been successfully created, the entity page is displayed for viewing. The D&B data is displayed on the **D&B Information** subtab. For more information, see the help topic Viewing Matched Records.

   You can edit the entity record to enter more information. For instructions on entering entity details, see the topic for creating records specific to each entity:

   - Creating a Lead Record
   - Prospects
   - Customers
   - Adding a Vendor Record

Updating Entity Details with D&B Values

You can update incorrect or incomplete entity details in NetSuite with data from D&B. This option applies to matched or linked entities and entity records created from D&B data, which have been updated with the DUNS number.

To update entity details with D&B values:

1. Go to Lists > Relationships > (Entity).

2. On the entity list, click the View link for the record to be updated.

3. On the entity page, click **Update Using D&B Values**.

   This button is available in view mode only.

4. On the Update customer popup, in the **Select** column for each field, you can select one of the following:

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- **NetSuite (Retain)** - Select this option to retain the NetSuite data.
- **D&B** - Select this option to update the field with D&B data.
- **Custom** - Select this option, and then enter the data in the **Custom Value** field.

> ⓘ **Note:** For blank NetSuite fields, the default setting is the D&B information.

5. Click **Submit**.

   On the entity record, you can view the fields updated with your selected or entered data.

Using Data Monitoring for D&B Reference Records

With Data Monitoring, you can track changes and updates to details on registered D&B reference records. To enable Data Monitoring for D&B Data Management, see the help topic Setting Up D&B Accounts and Preferences. For more information about D&B reference records, see the help topic Matching with D&B Reference Records.

Key points when using data monitoring:

- Refer to the procedures described in the following topics to register D&B reference records:
  - To register existing records created prior to enabling Data Monitoring in your account, see the help topic Registering or Deregistering D&B Reference Records
  - To automatically register new records created during entity matching, enable the Automatic Register for Matched Entities preference. For more information about this preference, see the help topic Setting Up D&B Accounts and Preferences.
- Only fields on registered D&B reference records are monitored and automatically updated.
  - D&B changes to fields that are not part of the reference record are ignored.
  - Changes are also reflected automatically in corresponding fields on the **D&B Information** subtab of matched entity records. For more information, see the help topic Viewing Matched Records.
  - For limitations on updates supported by Data Monitoring, see the help topic Limitations of D&B for NetSuite Integration.

- D&B updates are monitored through the DNB MR Change Notice scheduled script, which runs daily, starting at 12 a.m. During each run, it retrieves D&B updates within the last 3 days, to ensure that nothing had been missed in previous runs. For more information, see the help topic Viewing D&B Updates in Logs.

- Registered reference records are initially set to **Pending** status. A scheduled script runs daily to track D&B changes to the status and automatically updates pending registrations to **Active** status. You can view the latest status on the D&B Reference Record page, in the **Monitoring Status** field. For more information, see the help topic Viewing D&B Updates on Reference Records.

> **ⓘ Note:** You can also view the **Monitoring Status** field on entity records.

- You can set up saved searches to track updated D&B reference records and the registration status. For more information, see the help topic Defining Saved Searches for Data Monitoring.

Registering or Deregistering D&B Reference Records

You can manually register existing D&B reference records that have been created prior to enabling Data Monitoring in your account. You can also deregister records that have been previously registered.

> **⚠ Important:** Be reminded that deregistering records disables data monitoring and automatic application of D&B updates.

To register or deregister D&B reference records:

1. Go to Dun & Bradstreet > List > Monitoring Registration.

2. On the D&B Monitoring Registration page, use any of the following filters to search for entities that you want to register.

> **⚠ Important:** By default, the D&B Monitoring Registration page opens in registration mode. To switch to deregistration mode, search by using either **Active** or **Pending** from the list in the **Status** field. In deregistration mode, only registered records are retrieved based on your selected filters.

Field Name	Description
Entity Type	Select the entity type of records that you want to retrieve. ■ **None** – Select this status to retrieve unregistered records, including those created prior to the enabling of Data Monitoring in your account. ■ **Active** – Use this status to deregister active records. ■ **Pending** – Use this status to deregister records that have been submitted for registration, but are not yet active. ■ **Failed** – Select this status if you want to register records that have not been successfully processed in a previous registration. > **ⓘ Note:** Currently, the **Expired** status is not applicable to Data Monitoring registrations through NetSuite.
Subsidiary	For OneWorld accounts, select the subsidiary associated with the records.
Group	Select the group that the entities belong to.

Field Name	Description
	ⓘ Note: If you add a group filter, all records associated with the group are retrieved, regardless of your filter selections for entity type, status, and subsidiary.
Company Name	Enter the complete or partial company name.
DUNS Number	Enter the DUNS number of the entity to narrow down the results.
Country	Enter the country name. When you have entered at least 3 characters, you can select from the results displayed below the field.

3. Click **Search**.

   Search results are displayed in the Entities sublist.

   > **ⓘ Note:** Registered records and those pending registration are not displayed in the sublist to prevent resubmission.

4. In the Entities sublist, check the box for the records you want to register.

   > **✔ Tip:** Click the **Mark All** button to select all records on the current page. You can do the same for records on any succeeding pages. Click the **Unmark All** button to deselect records across all pages.

   In the **Entity** column, you can click the View link to open and view the D&B Reference Record page.

5. Click **Register** or **Deregister**.

   Click **Reset** if you want to return the default settings of the filters. Resetting a page also clears the search results.

   If you selected 10 records or less, registration is immediately submitted for processing. If you selected more than 10 records, registration is queued for processing, which might take a few minutes to complete. During processing, you can view the progress on the D&B Process Status page. On this page, click **Refresh** to get the latest processing status. After processing has been completed, you can view the following details:

   - **Record Count** – This field displays the total number of records for registration.
   - **Results** – This field displays the breakdown of records:
     - **Processed** – Total number of successfully processed records
     - **Skipped** – This count is used for registered records, to display the total number of records with no D&B changes to the monitoring status.
     - **Failed** – Total number of records that were not processed successfully due to errors

> **(i) Note:** As administrators, you can view processing errors or details of failed registrations in the execution logs of the DNB MR Register Duns script. If you want to set up a saved search that retrieves failed registration records, see the help topic Defining Saved Searches for Data Monitoring.

Viewing D&B Updates on Reference Records

D&B updates are applied automatically to registered reference records. To view reference records, go to Dun & Bradstreet > List > D&B Reference Records. On the D&B Reference Records: Results page, click the View link of a record to open it. On the D&B Reference Record page, you can view the D&B fields and the following details:

- In the **Monitoring Status** field, view the status of the registration.

  > **(i) Note:** Status updates from D&B are monitored automatically through the DNB MR Register Duns script, which runs daily, every 12 a.m. The script checks for updates to the status of registered records. It automatically reflects any updates in the **Monitoring Status** field.

- On the **System Notes** subtab, you can view details of an update, which include the date when the change was made, updated fields, and their new values.

If you want to set up a saved search that retrieves records with D&B updates, see the help topic Defining Saved Searches for Data Monitoring.

Viewing D&B Updates in Logs

D&B updates are displayed in execution logs of the DNB MR Change Notice script. As Administrators, you can view the logs for each run by going to Customization > Scripting > Scripts. On the Scripts list, click the View link for the script. On the Script page, under the **Execution Log** subtab, look for logs with **ChangeNoticeProcessId** in the **Title**, and then view the D&B updates in the **Details** column:

- **ReferenceRecordId** – Internal Id of the process record
- **Change Event** – Contains the following details: field Id from D&B, name or label of the updated field, internal Id of the field label, new field value

> **(i) Note:** If you want to set up a saved search that retrieves available logs from completed runs, see the help topic Defining Saved Searches for Data Monitoring.

Using DNBi Risk Management for NetSuite

For DNBi Risk Management for NetSuite subscribers, you can request for credit for both new and existing leads, customers, and prospects within your NetSuite account. You can also request for credit on new and existing sales orders. The credit application details and status can be monitored on the entity or sales order record.

Review the following guidelines for credit requests:

- When you submit a credit request, you receive the recommended credit limit from DNBi in the base currency of your company. You can verify that this currency matches the one on the entity record.

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For more information, see the help topic Working with Currencies for single currency accounts or Assigning Currencies to Entities for multicurrency accounts.

■ To submit credit requests for entities or on sales orders, entities must have either the DUNS number or country specified in the **Address** field of the record. You can view the address of an entity by going to Lists > Relationships > (Entity). On the entity record, the address is displayed in the Email | Phone | Address section and on the **Address** subtab.

You have the option to choose a matching D&B record for the entity along with the credit request.

■ Credit decisions for automatic requests are based on the policies and rules that you have set up in your DNBi account.

For more information about credit requests through DNBi Risk Management, see the following topics:

■ Applying for Credit for Entities

■ Applying for Credit on Sales Orders

■ Viewing and Processing Credit Applications

Applying for Credit for Entities

To apply for credit for new entities

With DNBi Risk Management for NetSuite, with or without D&B Data Management, credit applications can be automatically included during the creation of entity records. This option is available only if you have enabled the following preference: **Automatically request credit for new customers, leads, prospects**. For more information about the preference, see the help topic Setting Up D&B Accounts and Preferences.

Review the following guidelines for submitting credit requests for new entities:

■ To create entity records with automatic credit requests, use the **Create via D&B Match** button. If you do not use this option, you can create the entity record first before submitting a credit request.

■ When you create an entity using D&B data, without D&B Data Management, you cannot use the DUNS number to search for possible D&B record matches. You can use only the company name and country with other address details. For more information, see the help topic Creating Entity Records Using D&B Data.

■ On new entity records, you can view the details and status of the credit application. For more information, see the help topic Viewing and Processing Credit Applications.

■ For general credit request guidelines, see the help topic Using DNBi Risk Management for NetSuite.

To request for credit for existing entities:

You can create a credit application for entities matched with D&B reference records or existing records that have not yet been matched or updated with a DUNS number. For unmatched entities, you have the option to select a matching D&B reference record aside from submitting a credit request.

1. Go to Lists > Relationships > (Entity).

2. On the entity list, click the View link for the entity record.

3. On the entity record, click **D&B Credit Request**.

4. Do either of the following for matched or unmatched entities:

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- For matched entities

  On the Request Credit page, in the **Requested Amount** field, enter the requested credit amount.

- For unmatched entities

  - On the Request Credit page, in the **Requested Amount** field, enter the requested credit amount.

  - To match the entity, in the **Select** column, choose the matching D&B record.

  - If you do not want to match the entity, choose the **None** option that is displayed in the **DUNS Number** column.

5. Click **Submit**.

   The Request Credit page is displayed where you can view the details and status of the application. For select roles, you can click the Application Number link to view the credit application record in your DNBi account. For more information about viewing credit details, see the help topic Viewing and Processing Credit Applications.

Applying for Credit on Sales Orders

You can submit credit requests on new and existing sales orders for leads, prospects, and customers. This option is available to entities with or without a credit limit.

The following guidelines apply to credit requests on sales orders:

- The requested credit amount defaults to the sum of the balance and unbilled orders on the entity's record. For entities without existing orders, the requested amount defaults to the total amount of the sales order. You cannot change the requested credit amount.

- Entity records are verified to determine if the sum of the values in the **Balance** and **Unbilled Orders** fields meets or exceeds the value in the **Credit Limit** field. Depending on your credit limit settings, you cannot create sales orders and submit credit requests when the credit limit has been met or exceeded. Depending on your credit limit settings, you cannot create sales orders and submit credit requests when the credit limit has been met or exceeded. For the following credit limit settings, you can create sales orders, but you cannot submit manual or automatic credit requests, even when the credit limit has not been exceeded:

  - On the entity record, the credit limit hold setting is **On.**

- For Accounting Preference, the customer credit limit handling setting is **Enforce Holds**.
- On the sales order, using the Standard Sales Order - Invoice form, or using the Standard Sales Order form with the terms set on the **Billing** subtab.

In cases where you cannot submit a credit request on the sales order, you can submit a credit request on the entity record first. For more information, see the help topic Applying for Credit for Entities.

> ⓘ **Note:** If you have the Overwrite NetSuite credit limit and terms preference enabled, the NetSuite credit limit is replaced with the value of the recommended credit limit from D&B. Succeeding credit requests for the entity are validated using this limit from D&B. For more information about this preference, see the help topic Setting Up D&B Accounts and Preferences.

For more information about credit limit holds, see the following topics:

- Customer Credit Limits and Holds
- The Standard Sales Order Form

- Sales order approval is separate from credit application approval. It is possible for sales orders on pending approval to have an approved credit request.
- For general credit request guidelines, see the help topic Using DNBi Risk Management for NetSuite.

To request for credit on new sales orders:

For entities without a credit limit, you can include a credit request when you create the sales order transaction. To request for credit on sales orders, you must enable the following preference: **Automatically request credit upon sales order creation**. For more information about this preference, see the help topic Setting Up D&B Accounts and Preferences.

Review the following guidelines for submitting credit requests on new sales orders:

- When you create sales orders with credit requests, you also have the option to match entities with D&B records. After a sales order has been saved, the D&B Match popup is displayed where you can select from the list of candidate matches. For more information, see the instructions in the next section for requesting credit on existing sales orders.
- After you have submitted a sales order, the credit request link is displayed in the **Last Credit Application** field. For select roles, you can click the link to view the credit request details in DNBi. For information about viewing the credit request status, see the help topic Viewing and Processing Credit Applications.

To request for credit on existing sales orders:

You can submit credit requests on existing sales orders when the entity's credit limit exceeds the sum of the balance and unbilled orders on the entity record. Otherwise, on the sales order, the **D&B Credit Request** button is not displayed.

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. On the Sales Orders list page, click the View link for the sales order record.
3. On the Sales Order page, click **D&B Credit Request**.
4. On the Request Credit page, do any of the following:
   - For matched entities

     On the Request Credit page, you can view the requested amount.

- For unmatched entities
  - On the Request Credit page, you can view the requested amount.
  - To match the entity, in the **Select** column, choose the matching D&B record.
  - If you do not want to match the entity, choose the **None** option that is displayed in the **DUNS Number** column.

5. Click **Submit**.

   The details and status of the credit application are displayed. For select roles, you can click the Application Number link to view the credit application record in your DNBi account. For more information about viewing credit request details, see the help topic Viewing and Processing Credit Applications.

   To return to the sales order page, click the sales order number link in the **Transaction** field.

Viewing and Processing Credit Applications

You can view credit applications that you have submitted through entity or sales order records. You can also access credit applications in your DNBi account through a link on the record.

> ⓘ **Note:** If you have not set up your DNBi credentials, when accessing the DNBi page for the first time, you are required to enter the user ID and password for your DNBi account. For more information, see the help topic Setting Up D&B Accounts and Preferences.

If the D&B portlets have been set up in your account, you can view the list of credit applications on the Home or Dun & Bradstreet dashboard. For more information, see the help topic Defining D&B Saved Searches.

To view all credit applications:

1. Go to Dun & Bradstreet > DNBi Risk Management > Credit Application Records.

   The list of all credit applications in the account is displayed.

2. On the Credit Applications list, click the View link for the application that you want to open.

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You are redirected to your DNBi account where you can view the credit application record. For approvers, you can also process the credit application. Any updates to the status or credit amount in the DNBi account are reflected on the entity record, on the **DNBi Risk Management** subtab.

You can apply the following filters to limit the applications displayed in the list:

- **Application Date From** - Enter the start date for the range of application dates.
- **Application Date To** - Enter the end date for the range of application dates.
- **Application Status** - Select the credit application status.

After you have applied the filters, click **Refresh**.

To view credit applications per entity:

On records for customers, leads, and prospects, you can view credit applications that have been requested directly on the entity record or through a sales record.

1. On the entity list, click the View link for the entity record.
2. Go to Lists > Relationships > (Entity).
3. On the entity page, click the **DNBi Risk Management** subtab.

   On the **Credit Application History** subtab, you can view the details of all credit applications that have been submitted for the entity. Credit requests that have submitted on a sales order are displayed with the sales order number in the **Transaction Reference** column.

   For roles with credit permissions, you can access the latest credit application through the link in the **Last Credit Application** field. This link is displayed only after you have submitted an initial credit request. The link redirects you to your DNBi account where you can view the credit application details. For credit approvers, you can also process or approve the credit application. Updates to the status and other credit details are reflected on the entity record.

To view the credit application on sales orders:

For roles with credit permissions, you can access a credit application through the link on the sales order record. For information about setting up permissions, see the help topic D&B Roles and Permissions.

1. Go to Transactions > Sales > Enter Sales Orders > List.
2. On the Sales Orders list page, click the View link for the sales order record.
3. On the Sales Order page, click the link in the **Last Credit Application** field.

   The **Last Credit Application** field is displayed only after you have submitted a credit request. The link redirects you to your DNBi account where you can view the credit application record. For credit approvers, you can also process the credit application. You can view the status of the credit application and other details on the entity record in NetSuite.

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