



USING CUSTOMER RELATIONSHIP MANAGEMENT

Course Description

Do you need to learn NetSuite Customer Relationship Management (CRM) processes and tasks? Will short tutorials help you be more effective on the job?

Using Customer Relationship Management (CRM) includes 27 video tutorials, with an average duration of seven minutes each, illustrating how to complete a specific CRM task in NetSuite. You can select which tutorials to watch for just-in-time training or you can complete all the tutorials for a comprehensive training experience.

Expert NetSuite instructors walk you through each CRM process step-by-step. Along the way, recommended tips, best practices and key points are shared to make sure you use NetSuite most effectively. Downloadable Quick Reference Guides are also included with most tutorials, so you have step-by-step instructions for later reference.

Key Tasks

How do I:

- Set up sales rules and territories?
- Establish quotas?
- Create a forecast and set up commissions?
- Create forms?
- Create and manage customer interactions?
- Create email templates?
- Create an Opportunity from the Customer Record?
- Convert a lead to prospect?
- Manage multiple quotes for forecasting?
- Manage Opportunities Pipeline?
- Create a Sales Order from a quote?
- Approve and bill a Sales Order?
- Create a cash sale?
- Work with CRM Reports?

Who Should Attend

This course will benefit those in a sales role that have responsibility for direct selling or manage the CRM sales life cycle.

Prerequisites

Participants should be familiar with NetSuite navigation and functionality prior to taking this training. To ensure you have the necessary skills, watch the Getting Started tutorials available in the SuiteAnswers Training Videos library.

Introduction

[Personalizing Home Dashboard for CRM Tasks:](#)

NetSuite provides flexibility in building your Home Dashboard based on your role. In this topic, you will learn how to tailor the dashboard for a role that has CRM responsibility, add and set up portlets including Reminders, Shortcuts, Recent Records, Quick Search, KPIs and Report Snapshots.

Setting Up Sales Preferences

[Creating an Online Lead Form:](#) Learn how to set up and create an Online Lead Form that can be integrated into a website, using a link, so that the customer can submit sales inquiries, general questions, feedback, etc.

[Setting Up Sales Rules:](#) Learn how to set up sales rules, using a set of parameters, to assign potential customers to sales representatives. Sales rules are based on standard and custom fields found on lead, prospect and customer records, such as name, address and phone number.

Related Courses

Take these courses for more training:

- [NetSuite: Sales Force Automation](#)
- [NetSuite: Marketing Automation](#)

[Setting Up Sales Territories:](#) Learn how to create a new territory and set up the associated rules that will assign customers to this new territory.

[Establishing Quotas:](#) Learn how to set sales quotas for your sales representatives and sales teams that are aligned to organization revenue goals.

[Creating a Forecast:](#) Learn how to create a sales forecast for your individual sales representatives and overall team target. In addition, learn how to use the Advanced Forecasting feature to more accurately set forecasts.

[Setting Up Commissions:](#) Learn how to set up commissions and create a commission plan.

Managing Contacts and Activities

[Creating a New Contact:](#) Learn how to create new contacts in NetSuite from your leads, prospects and customers. This will allow you to track and manage these contacts as you work through the sales lifecycle.

[Creating a New Lead:](#) Learn how to create a new lead and complete the lead qualification process.

Creating a New Prospect: Learn how to create a new prospect to gather their contact information, manage all your communication or interaction with the prospect, and track opportunities and estimates offered to them.

Creating a New Customer: Learn about the basic functionalities of the NetSuite Customer Form and how to create a Customer Record.

Creating and Managing Activities: Learn how to create events, tasks and phone call activities.

Managing Customer Interactions: Learn how to create notes, attach files and log activities.

Creating Email Templates: Learn how to save time by creating custom emails for customers, business partners and contacts.

Sending an Email and using Email Templates: Learn how to send an email directly from NetSuite and customize an email template.

Working with Leads and Prospects

Creating an Opportunity from the Customer Record: Learn how to create an Opportunity Record from the Customer Record, adding items of interest to the customer and setting the status and probability.

Converting a Lead to a Prospect: Learn how to convert a Lead to a Prospect by changing the status in a Lead Record, or by creating an Opportunity Record based on an existing Lead.

Creating a Quote from the Prospect Record: Learn how to create a quote from a Prospect Record.

Live Training Webinars

Participate in free Webinars to get practical tips and tricks for using NetSuite better:

- Go to suitetraining.com > Webinars and Events to view the schedule and register for an event.

Printing and Emailing a Quote Estimate:

Learn how to use the print and email features to send out a quote estimate to a prospect or customer.

Managing Multiple Quotes for Forecasting:

Learn how to manage your own sales quote and how managing multiple quotes affects sales forecasting.

Managing Opportunities Pipeline: Learn how to manage your opportunities in your pipeline and see how keeping opportunity statuses up-to-date will make your pipeline more accurate and relevant.

Managing Sales Transactions

Creating a Sales Order from the Quote:

Learn how to create a Standard Sales Order using details from an existing quote.

Approving and Billing a Sales Order: Learn how to approve a Sales Order if the Sales Order requires approval before entering the Fulfillment Queue.

Creating a Cash Sale: Learn how to process a cash sale.

Reporting

[Working with CRM Reports](#): Learn how to navigate, read and use each of NetSuite's CRM reports.

[Reviewing Sales Reports](#): Learn how to navigate Sales Reports to view detailed customer interactions or sales transactions.

[Reviewing Order Status Reports](#): Learn ways of viewing Order Status Reports.

SuiteAnswers

Get answers to your support and training related questions:

- Go to Training Videos to find Getting Started tutorials.
- Take New Feature Training to learn about the latest NetSuite release.

NetSuite reserves the right to adjust the stated course content to reflect changes to the NetSuite application and to meet the expressed needs of course attendees.

Features and functions covered in this course might not reflect those in your purchased NetSuite account.