Sales Force Automation: Fundamentals

Course Description

Are you responsible for your organization's sales operations? Learn how to use NetSuite's Sales Force Automation (SFA) solution to improve your efficiency, operations and sales activities.

Sales Force Automation: Fundamentals introduces you to the essential concepts of NetSuite SFA features and capabilities. This two-day course begins with a "big picture" overview and demonstrations of core SFA and Customer Relationship Management (CRM) functionality. Through case studies, hands-on exercises and leading practices discussions, you will examine the overall process workflows, become familiar with NetSuite terminology and take a "deep dive" into application configuration.

By the end of this course, you will be able to setup, plan and execute sales operations in NetSuite.

Who Should Attend

- NetSuite Administrators
- Sales Operations Managers
- Sales Managers

Key Tasks
How do I:

- Create and manage sales rules and territories?
- Set up online lead forms to bring new leads directly into NetSuite?
- Set up CSV import mappings to import leads easily and quickly?
- Create campaigns so sales reps can email customers directly?
- Monitor activities on leads, prospects and opportunities?
- Design role-specific dashboards to facilitate daily tasks?

Prerequisites

- Participants should have significant sales background knowledge and some experience operating SFA and CRM processes within NetSuite.

- Course participants should be familiar with NetSuite navigation and features. To learn how to navigate NetSuite and perform common tasks, view the Getting Started training videos.

Course Objectives

- Enable NetSuite sales features and sales preferences.

- Set up employees as sales representatives.

- Establish quotas for your sales reps and teams.

- Set up team selling or sales groups, and create sales rules and territories for automated lead assignment.

- Enable and use marketing features related to sales campaigns.

- Create email templates for sales campaigns, set up email campaigns, and track responses to campaigns.

- Describe the relationship and flow of opportunities, estimates and sales orders.

- Edit forecasts and include sales transaction information in forecast and pipeline reports.

- Install and use the Last Sales Activity (LSA) SuiteApp.

- Set up Smart Sales Dashboards to monitor sales activities.

Related Courses
Take these courses for more training:

- SuiteAnalytics: Reports and Searches

- Marketing Automation

Day 1 Agenda

Perform Initial Setup: Examine system considerations and enable sales features and preferences to match your business needs.

Sales Force Automation Setup: Set up employees as sales representatives, decide between using team selling or sales groups, create sales rules and territories for automated lead assignment, and establish quotas for your sales reps and teams.

Capturing Leads in NetSuite: Define lead sources, create online lead forms to capture information and import leads using the NetSuite Import Manager.

Sales Email Campaigns: Examine the differences between sales campaigns and email merge, enable the marketing features related to sales campaigns, define criteria for targeted audiences, create email templates for sales campaigns, set up email campaigns, and track responses to campaigns.

Day 2 Agenda

Lead to Customer Management: Describe the lead-to-customer life cycle and process flow, define sales process terminology, explain stages, statuses and probability percentages, describe the relationship, and flow of opportunities, estimates and sales orders.

Forecasting and Pipeline: Examine the forecasting and pipeline setup and preferences, edit forecasts as a sales rep or as a sales manager, include sales transactions in forecast and pipeline reports, manage the sales forecast from the dashboard, and report on forecasts using standard reports.

Last Sales Activity: Review CRM features and preferences, install the Last Sales Activity (LSA) SuiteApp, set LSA preferences, set up LSA mass updates, explain how to use the LSA field and personalize dashboards with LSA data.

Smart Sales Dashboards: Set up a Smart Sales Dashboard, set up trend graphs to monitor sales over time and utilize the portlet date settings for specific points in time.

SuiteAnswers
Get answers to your support and training related questions:

- Go to Videos to find Getting Started tutorials.

- Take New Feature Previews 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.