



Manage the Complete Customer Lifecycle

NetSuite CRM



Today's successful companies adapt to their customer's needs. Where possible, they have replaced manual processes with automated ones to improve responsiveness. NetSuite Customer Relationship Management (CRM) delivers powerful capabilities all in a single cloud solution, including sales force automation, marketing automation, and customer service and support. NetSuite CRM also includes powerful sales performance management, order management, and partner management seamlessly integrated with NetSuite.

Key Benefits

- Streamline lead-to-cash processes.
- Elevate productivity across the organization with a full view of your customers.
- Improve sales performance through forecasting, upsell, and commission management.
- Manage global sales, marketing, services, and partner organizations.
- Remotely access CRM data on your mobile device.

Sales Force Automation

Equip sales with real-time access to prospect, customer, opportunity, and order records.

- Manage opportunities across status, revenue, key contacts, notes, and related documents.
- Provide sales managers with a complete view of all leads and opportunities in the pipeline.
- Capture detailed records across all interactions and convert opportunities into quotes and sales orders.

Reporting and Analytics

Real-time dashboards deliver customizable, role-based reports to sales, marketing, and service teams.

- Measure continuous sales performance with personalized key performance indicators.
- Access sales goals such as achieved versus quota, actual versus sales forecast, and sales pipeline by stage.
- Monitor customer service metrics on call resolution times, customer satisfaction, subscription renewals, call volumes, and case trends.
- Examine marketing benchmarks like lead-to-close metrics, number of website unique visitors, lead-generation trends, and customer acquisition costs.

Sales Forecasting and Quota Management

Build reliability, predictability, and trust into the sales process.

- Allow users to categorize the transaction forecast type to appropriately identify opportunities, quotes, and estimates.
- Utilize probability-based forecasting with adjustable weighted measurement of pending opportunities, quotes, and orders.
- Analyze actual sales and recurring revenue projections in forecasts and variances.

Upsell, Quote, and Order Management

Easily convert quotes into approved sales orders and automatically process with back-end financials.

- Provide recommendations based on intelligent upsell management and buying patterns.
- Improve quote and order accuracy by including automated tax and shipping-rate calculations, pricing, and discounting rules.
- Accelerate order management with online approval and automated workflows.

Customer Service and Support

Provide the customer service center with a full customer view.

- Automate case management processes for assignment and escalation.
- Track support cases according to product, issue, case type, partner, or customer.
- Enable online self-service with case submissions, status tracking, and communications.

Marketing Automation

Automate multi-channel marketing campaigns to align with sales efforts.

- Enable rapid response to maximize the value of opportunities.
- Automate lead capture from websites, search engines, direct mail, and events.
- Build and send promotional or automated email marketing campaigns.
- Support upsell marketing based on historical purchasing patterns.

Partner Relationship Management

Fully control every element of the partnering process.

- Manage leads, joint marketing, sales pipeline, orders, and commissions.
- Enable partners to register, manage, and track their leads.
- Provide full visibility into your partners' sales forecasts.

Mobile

Access real-time business information on mobile devices.

- View, enter, and update key customer and sales data.
- Submit time sheets and expenses with easy snap and attach receipts.
- Manage everyday activities, tasks, and calls from your smartphone.

ORACLE

NetSuite

Search

Help

Feedback

Kathryn Glass

NetSuite - Administrator

Activities

Payments

Transactions

Lists

Reports

Analytics

Documents

Setup

Customization

Commerce

Fixed Assets

Administration and Controls

SuiteApps

Support

Customer Dashboard

Botique 2021

Switch to Customer 360 view

Switch to Form view

Viewing: Portlet date settings

Personalize

Layout

Customer (default)

Customer

Botique 2021

Auto

Name

Botique 2021

Type

Company

Company Name

CUSTOMER-Closed Won

Status

Will Clark

Sales Rep

Partner

Web Address

http://www.Botique2021.com

Default Order Priority

Email

info@Botique2021.com

Phone

(202) 555-2412

Address

Botique 2021 Botique 2021

104 W State St #91

Toledo IA 52342

United States

US - Sub 1

Trade Show

[Default Event]

0.00 Consolidated 0.00

0.00 Consolidated 0.00

Consolidated

12/31/2024 11:31 am

Use System Preference

View

Edit

Key Performance Indicators

Indicator	Period	Current	Previous	Change
Sales	This Month vs. Last Month	\$7,781	\$5,995	↑ 29.8%
Forecast	This Month	\$8,891		
Total Pipeline (Projected)	Current	\$0		
Balance	End of This Month vs. End of Last Month	\$0	\$0	0.0%
Unbilled Orders	End of This Month vs. End of Last Month	\$1,997	\$0	↑ N/A
Overdue Balance	Current	\$0		
Days Overdue	Current	0		
Average Days to Pay	This Month	2,885		
Average Days Overdue	This Month	-27,824		

Customer Dashboard Links

Sales Reports

Sales by Customer Detail

Sales Orders by Customer Detail

Forecast by Customer Detail

Sales Activity by Customer Detail

Total Pipeline by Customer Detail

Pipeline by Customer Detail

Sales by Item

→ Detail

Sales by Sales Rep Detail

Open Sales Orders

Financial Reports

A/R Aging Detail

Unbilled Cost by Customer Detail

A/R Payment History by Payment

A/R Payment History by Invoice

Activities

Tasks

Phone Calls

Events

Transactions

Create Opportunities

Prepare Estimates

Enter Sales Orders

Top 5 Items By Sales

previous one year