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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.
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.
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.

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.
   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:

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.

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.
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:

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.

**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.

![Diagram of sales territory assignment process](image)

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.
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.

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

   For more information, read the help topic **Alternate Sales Amounts**.

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:

- 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 SuiteApp Marketplace 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 Center SuiteApp

- 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

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
- 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

<table>
<thead>
<tr>
<th>Enhanced Sales Center</th>
<th>Standard Sales Center</th>
<th>Fields used in other popular CRM applications</th>
<th>Search Fields to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Rep</td>
<td>Account Owner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer ID / Prospect ID</td>
<td>Name/ID</td>
<td></td>
<td>Name/ID</td>
</tr>
<tr>
<td>Customer Name</td>
<td>Account Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Parent Customer</td>
<td>Parent Account</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>Phone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td>Fax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td>Web Address</td>
<td>Website</td>
<td>Web Address</td>
</tr>
<tr>
<td>Category</td>
<td>Type</td>
<td>Category</td>
<td></td>
</tr>
<tr>
<td>Industry</td>
<td>Industry</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No. of Employees</td>
<td>Employees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annual Revenue</td>
<td>Annual Revenue</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Field Labels on Customer and Prospect Records

<table>
<thead>
<tr>
<th>Enhanced Sales Center</th>
<th>Standard Sales Center</th>
<th>Fields used in other popular CRM applications</th>
<th>Search Fields to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign</td>
<td>Marketing &gt; Lead Source</td>
<td></td>
<td>Lead Source</td>
</tr>
<tr>
<td>Description</td>
<td>Comments</td>
<td>Description</td>
<td>Comments</td>
</tr>
<tr>
<td>Created Date</td>
<td>Date Created</td>
<td>Created By</td>
<td>Date Created</td>
</tr>
<tr>
<td>Last Modified Date</td>
<td></td>
<td>Last Modified By</td>
<td></td>
</tr>
</tbody>
</table>

### Field Labels on Lead Records

<table>
<thead>
<tr>
<th>Enhanced Sales Center</th>
<th>Standard Sales Center</th>
<th>Fields used in other popular CRM applications</th>
<th>Search Fields to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Rep</td>
<td>Sales Rep</td>
<td>Lead Owner</td>
<td></td>
</tr>
<tr>
<td>Lead ID</td>
<td>Name/ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td></td>
<td>Name</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** The Lead Conversion feature must be enabled in your account for the Name field to appear on a new Lead form.

<p>| Company               | Company               |                                              |                      |
|-----------------------|-----------------------|----------------------------------------------|                      |
| Title                 | Title                 |                                              |                      |
| Lead Status           | Status                | Lead Status                                  | Status               |
| Phone                 | Phone                 | Phone                                       | Phone                |
| Mobile Phone          | Mobile Phone          |                                              |                      |
| Email                 | Email                 | Email                                        |                      |
| Rating                | Qualification &gt; Sales Readiness | Rating                                      | Sales Readiness |
| 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&gt;Lead Source | Lead Source                                  |                      |
| Created Date          | Date Created          | Date Created                                 |                      |</p>
<table>
<thead>
<tr>
<th>Field Labels on Lead Records</th>
<th>Enhanced Sales Center</th>
<th>Standard Sales Center</th>
<th>Fields used in other popular CRM applications</th>
<th>Search Fields to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Modified Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Labels on Contacts</th>
<th>Enhanced Sales Center</th>
<th>Standard Sales Center</th>
<th>Fields used in other popular CRM applications</th>
<th>Search Fields to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Owner</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contact ID</td>
<td>Contact</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer Name</td>
<td>Company</td>
<td>Account Name</td>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>Job Title</td>
<td>Title</td>
<td>Job Title</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>Main Phone</td>
<td>Phone</td>
<td>Phone</td>
<td></td>
</tr>
<tr>
<td>Mobile Phone</td>
<td>Mobile Phone</td>
<td>Mobile</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
<td>Email</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reports To</td>
<td>Relationships &gt; Supervisor</td>
<td>Reports To</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mailing Address</td>
<td>Address</td>
<td>Mailing Address</td>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>Fax</td>
<td>Fax</td>
<td>Fax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assistant</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asst. Phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>Comments</td>
<td>Description</td>
<td>Comments</td>
<td></td>
</tr>
<tr>
<td>Created Date</td>
<td>Date Created</td>
<td>Created Date</td>
<td>Date Created</td>
<td></td>
</tr>
<tr>
<td>Last Modified Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Field Labels on Opportunity Records</th>
<th>Enhanced Sales Center</th>
<th>Standard Sales Center</th>
<th>Fields used in other popular CRM applications</th>
<th>Search Fields to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Rep</td>
<td></td>
<td>Opportunity Owner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Opportunity Number</td>
<td></td>
<td>Opportunity #</td>
<td></td>
<td>Number/ID</td>
</tr>
<tr>
<td>Opportunity Name</td>
<td></td>
<td>Title</td>
<td>Opportunity Name</td>
<td>Title</td>
</tr>
<tr>
<td>Customer Name</td>
<td></td>
<td>Company</td>
<td>Account Name</td>
<td>Prospect/Customer</td>
</tr>
<tr>
<td>Forecast Type</td>
<td></td>
<td>Forecast Type</td>
<td>Type</td>
<td>Forecast Type</td>
</tr>
<tr>
<td>Campaign</td>
<td></td>
<td></td>
<td></td>
<td>Primary Campaign Source</td>
</tr>
</tbody>
</table>

Sales Force Automation
## Field Labels on Opportunity Records

<table>
<thead>
<tr>
<th>Enhanced Sales Center</th>
<th>Standard Sales Center</th>
<th>Fields used in other popular CRM applications</th>
<th>Search Fields to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Close Date</td>
<td>Expected Close</td>
<td>Close Date</td>
<td>Expected Close Date</td>
</tr>
<tr>
<td>Actual Close</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stage</td>
<td>Status</td>
<td>Stage</td>
<td>Opportunity Status</td>
</tr>
<tr>
<td>Probability (%)</td>
<td>Probability</td>
<td>Probability (%)</td>
<td>Probability</td>
</tr>
<tr>
<td>Amount</td>
<td>Projected Total</td>
<td>Amount</td>
<td>Projected Amount</td>
</tr>
<tr>
<td>Range</td>
<td>Range</td>
<td>Range - High, Range - Low</td>
<td>Action Item</td>
</tr>
<tr>
<td>Next Step</td>
<td>Action Item</td>
<td>Next Step</td>
<td></td>
</tr>
<tr>
<td>Rating</td>
<td>Sales &gt; Sales Readiness</td>
<td></td>
<td>Sales Readiness</td>
</tr>
</tbody>
</table>

### 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.
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:

<table>
<thead>
<tr>
<th>Preference</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Color Theme</td>
<td>Custom: New Sales Color Theme</td>
</tr>
<tr>
<td>Screen Font</td>
<td>Arial</td>
</tr>
<tr>
<td>Limit Entry Forms to Two Columns</td>
<td>Yes</td>
</tr>
<tr>
<td>Expand Tabs on Entry Forms</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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
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:
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. For more information, see Forecasting Preferences. 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.
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:

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

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:

<table>
<thead>
<tr>
<th>Portlet</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Managers by Forecast</td>
<td>Shows the sales forecast for each sales team.</td>
</tr>
<tr>
<td>Sales Managers by Sales Orders</td>
<td>Shows the approved sales order totals for each sales team.</td>
</tr>
<tr>
<td>Sales Managers by Sales</td>
<td>Shows the sales totals for each sales team.</td>
</tr>
</tbody>
</table>

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.
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.

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.

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

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.
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**

   ![Report Builder](image)

   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.
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 calculate your worst case, most likely, and upside sales forecast. For more information on forecasting preferences, see Forecasting Preferences.
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.

<table>
<thead>
<tr>
<th>Forecast Type</th>
<th>Worst Case Forecast</th>
<th>Most Likely Forecast</th>
<th>Upside Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worst Case</td>
<td>$100</td>
<td>$100</td>
<td>$100</td>
</tr>
<tr>
<td>Most Likely</td>
<td></td>
<td>$100</td>
<td></td>
</tr>
<tr>
<td>Upside</td>
<td></td>
<td></td>
<td>$100</td>
</tr>
</tbody>
</table>

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.
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:

<table>
<thead>
<tr>
<th></th>
<th>Worst Case Forecast</th>
<th>Most Likely Forecast</th>
<th>Upside Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimate 1</td>
<td>$100</td>
<td>$100</td>
<td></td>
</tr>
<tr>
<td>Estimate 2</td>
<td></td>
<td></td>
<td>$300</td>
</tr>
</tbody>
</table>

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.
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.

<table>
<thead>
<tr>
<th>Forecast type</th>
<th>Worst Case Forecast</th>
<th>Most Likely Forecast</th>
<th>Upside Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worst Case</td>
<td>$1000</td>
<td>$2000</td>
<td>$3000</td>
</tr>
<tr>
<td>Most Likely</td>
<td></td>
<td>$2000</td>
<td>$3000</td>
</tr>
<tr>
<td>Upside</td>
<td></td>
<td></td>
<td>$3000</td>
</tr>
</tbody>
</table>

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.
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.

<table>
<thead>
<tr>
<th>Forecast type</th>
<th>Worst Case Forecast</th>
<th>Most Likely Forecast</th>
<th>Upside Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Most Likely</td>
<td></td>
<td>$2000</td>
<td>$2000</td>
</tr>
<tr>
<td>Upside</td>
<td></td>
<td></td>
<td>$2000</td>
</tr>
</tbody>
</table>

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
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:
- 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.
Saving Sales Rep Forecasts

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.
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.
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.
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.
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.
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.
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.