



# NETSUITE CRM+

Powerful CRM that Drives the Complete Customer Lifecycle

Today's successful companies are agile and responsive to their customer's needs. Where possible, they've replaced manual processes with automated ones, so they can respond quickly.

NetSuite CRM+ delivers powerful Customer Relationship Management (CRM) capabilities, including Sales Force Automation (SFA), marketing automation, customer support and service, ecommerce and flexible customisation, all in a single cloud CRM solution. And unlike typical CRM solutions, NetSuite CRM+ includes powerful sales performance management, order management and partner management.

NetSuite CRM+ can also integrate with your existing ERP investments.

“We wanted to future-proof our business with one source of data that we could depend on. NetSuite gave us all of that.”

**James Burt**, CFO, Seven Miles Coffee Roasters

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## Solution Highlights

### Powerful Sales Force Automation

NetSuite CRM+ provides SFA that equips the sales team with an accurate record of each opportunity and its status, a complete view of the prospect and real-time access to every detail.

- Improves sales efficiency with sophisticated document management capabilities to build and maintain a sales portal.
- Enables the sales team to manage opportunities across status, potential revenue, key contacts, notes, related documents and more.
- Provides sales managers with a complete view of all leads and opportunities in the pipeline.
- Comprehensive contact and activity management ensures sales has the tools

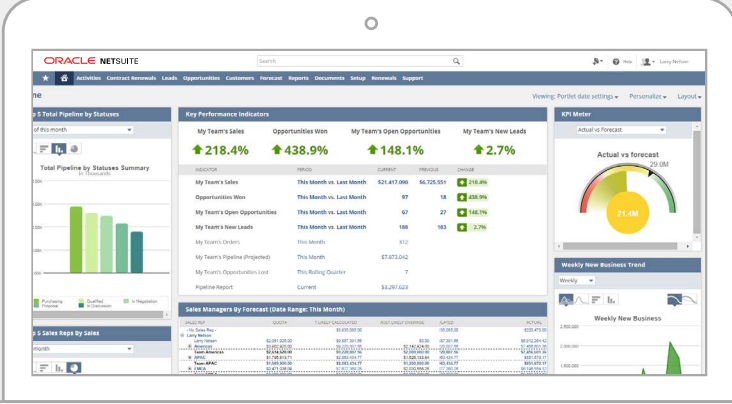
### Key Benefits

NetSuite CRM+ provides a seamless flow of information across the entire customer lifecycle.

- Streamlines lead-to-cash processes.
- Elevates productivity across the organisation with a 360-degree view of your customers.
- Improves sales performance through forecasting, upsell and commission management.
- Manages global sales and services organisations.

needed to capture detailed records of all interactions.

- Enables the sales team to convert opportunities into quotes and then sales orders with one click.



The screenshot displays the Oracle NetSuite CRM+ dashboard. At the top, there are navigation tabs for Activities, Contract Renewals, Leads, Opportunities, Customers, Forecast, Reports, Documents, Setup, Renewals, and Support. The main content area is divided into several sections:

- Total Pipeline by Stages:** A bar chart showing the distribution of opportunities across different stages.
- Key Performance Indicators:** A summary of key metrics with percentage changes:
  - My Team's Sales: 218.4% (up)
  - Opportunities Won: 438.9% (up)
  - My Team's Open Opportunities: 148.1% (up)
  - My Team's New Leads: 2.7% (up)
- Actual vs Forecast:** A gauge chart showing a 71.1% variance.
- Weekly New Business Trend:** A line chart showing the trend of new business over time.
- Sales Report By Forecast:** A table with columns for QUARTER, CURRENT OPPORTUNITIES, ACTUAL VALUE, and FORECAST. The table lists data for Q1, Q2, Q3, and Q4 across different quarters.

Get real-time visibility into sales, pipeline and forecasts.

## Advanced Sales Forecasting and Quota Management

NetSuite CRM+ advanced forecasting and quote management capabilities build reliability, predictability and trust into the sales process.

- Opportunities, quotes and estimates include a forecast category that allows users to categorise the transaction appropriately.
- Probability-based forecasting offers weighted measurement of pending opportunities, quotes and orders, with the ability to make adjustments.
- Order management capabilities provide actual sales and projections of recurring revenue in forecasts and variances.

## Automated Incentive Compensation Management

NetSuite CRM+ delivers flexible sales compensation management that frees up the sales operations team from time-consuming compensation calculation.

- Easily configure sophisticated sales commission rules based on quotas, sales, quantity, profitability and other criteria.
- Set up flexible commission schedules—monthly, quarterly, bi-annually or annually and short-term “SPIFs”.
- Integrates NetSuite’s built-in payroll capabilities, or with your existing payroll solution.

## Comprehensive Upsell, Quote and Order Management

The sales team can easily convert accurate quotes into approved sales orders, which then flow to your finance system for processing.

- Includes intelligent upsell management in the order-capture process to provide recommendations based on previous buying patterns.
- Improves quote and order accuracy by including automated tax and shipping-rate calculations, pricing and discounting rules.
- Accelerates the order management process with online approval and workflow management.

## Out-of-the-Box Marketing Automation

NetSuite CRM+ automates your entire marketing process across channels, allowing you to better align campaigns and programmes with your sales efforts.

- Enables execution and tracking of campaigns rapidly and in real-time to maximise the value of your leads and opportunities.
- Automates lead capture from multiple sources, including websites, search engines, email, direct mail and events.
- Delivers email marketing—from creation to execution to measurement—in one system.
- Features full reporting and drill-down to analyse campaign statistics and ROI from the start of a campaign to the final order transaction.
- Supports upsell marketing through analysis of historical purchasing combinations.

## Customer Service and Support

NetSuite's call centre capabilities enables you to serve customers quickly and efficiently with 360-degree customer view.

- Case management automates the business processes associated with customer support case assignment, management and escalation.
- Supports routing and tracking support cases according to product, issue, case type, partner or customer.
- Knowledge base helps customers get the answers they need, aids customer rep training and education, and drives service consistency.
- Real-time dashboards and reporting to monitor resolution metrics, renewals, and customer satisfaction.
- Online self-service enables customer case submissions, status tracking, communications and more.

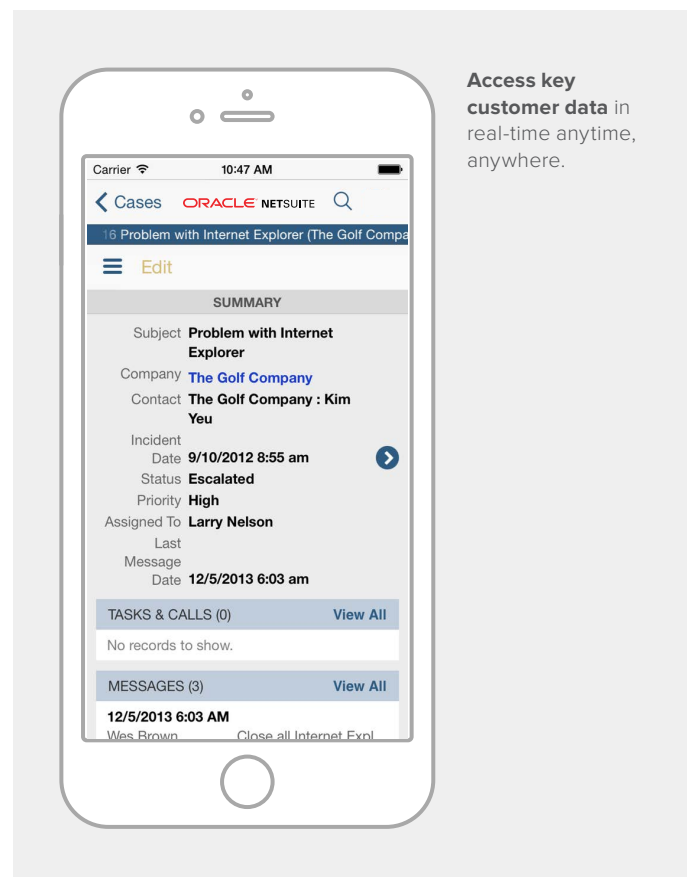
## Real-Time Dashboards, Reporting, Analytics and Planning

NetSuite delivers built-in, real-time role-based dashboards, reporting and analytics enabling your sales, marketing and service teams to monitor personalised Key Performance Indicators (KPIs) and access the latest reports as part of their everyday activities.

- KPI scorecards enable continuous sales performance measurement.
- Sales teams get instant access to key measures such as achieved versus quota,

actual versus sales forecast, sales pipeline by stage.

- Service teams can quickly monitor key metrics on call resolution times, customer satisfaction and renewals, call volumes and trends, and more.
- Marketing teams get instant lead-to-close metrics, number of website unique visitors, lead-generation trends, customer acquisition costs and more.
- Self-service reporting ensures everyone can create their own reports and manage their performance.



### Anytime, Anywhere Mobile Access

NetSuite's comprehensive support for mobile devices—iPhone, BlackBerry or Android (provided by both NetSuite and NetSuite partners)—ensures access to real-time business information they need.

- Access the latest business reports and business metrics.
- View, enter and update key customer and sales data.
- Time and expenses entry (including easy snap and attach receipt images).
- Activity management—calendar, tasks, calls.

### Integration with Ecommerce Platform

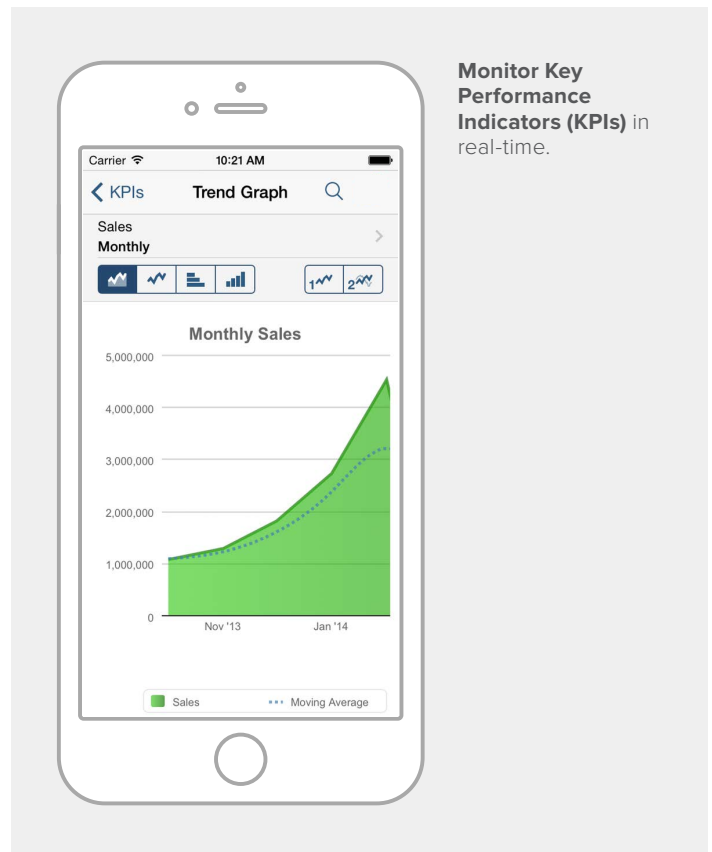
NetSuite CRM+ integrates with NetSuite's ecommerce platform, providing a single system of record for customer information and interactions as well as the customer's commerce transactions. This integrated solution allows you to monitor and measure everything that happens online and capture every interaction with a customer or prospect automatically.

- Enables capturing of micro-interactions, including a quick visit to a website.
- Improves sales effectiveness by providing greater visibility into products or services an existing customer may be investigating on the website.
- Enhances the customer experience by eliminating the need to reconcile data across CRM and ecommerce applications.

### Integration with Leading Social and Productivity Tools

NetSuite integrates with Yammer and Qontext using its SuiteSocial platform, improving collaboration and overall sales productivity.

- SuiteSocial integration supports Twitter-like cross-departmental collaboration around opportunities, orders and other transactions.
- Microsoft Outlook integration supports calendar and contact synchronisation.
- Google Apps integration supports calendar synchronisation and contextual access of NetSuite information from within Gmail.



## Partner Relationship Management

NetSuite CRM+ provides full control over every element of the partnering process, including joint marketing campaigns, lead management, pipeline management, order processing, and commissions and royalties.

- Lead management enables partners to register and track their leads.
- Supports accurate, up-to-the-minute partner sales forecasts.
- Provides full visibility into all of your partners' leads, orders and sales activities.

To find out more,  
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