



South African Weather Service

**Lead to Order Process
Training Manual**

Document Review and Distribution

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1 INTRODUCTION

Welcome to the world of NetSuite.

In this course, you will learn how to process Leads, Opportunities, Prospects, Quotes, Customers and Orders within the SAWS environment. You will become familiar with the layouts and menu paths of NetSuite. The NetSuite application run within a browser window i.e. Internet Explorer etc. When you log into NetSuite, you will see a set of tabbed pages. NetSuite calls these tabbed pages a “center”. The role that will be assigned to you will determine which “center” you will be able to see.

Upon completion of this module, you will be able to:

- Log-in and navigate NetSuite successfully
- Create Leads, Opportunities, Prospects, Quotes, Customers and Orders

NetSuite’s intuitive interface allows for actions to be initiated in various ways. The format of the training is designed to explore these methods as well. The user is free to use any method to achieve the result.

2 LEAD MANAGEMENT

A Lead is a company or person who has the possibility of becoming a customer. At the Lead stage it is possible to capture an Opportunity against the Lead, capture a Quote against the Lead to progress the Lead to a Prospect. Finally if an Quote is converted to an Order, the Prospect becomes a Customer.

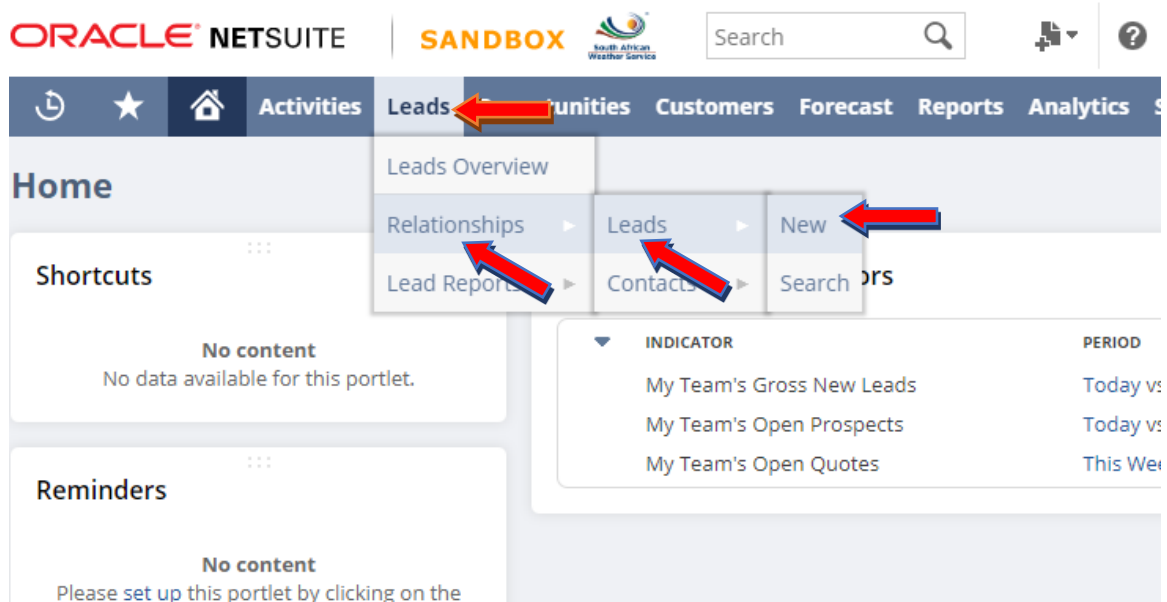
In the SAWS context, a Quote is a mandatory sales document.

2.1 Working with Leads

A Lead is created upon a prospective customer's first interaction with the company. The customer can be either an individual or a company.

2.1.1 Navigating

- On the menu bar, click on Leads, a drop down menu will display.
- Click on Relationships, then on Leads, and finally on New



The screenshot shows the Oracle NetSuite interface. At the top, there is a navigation bar with the following items: ORACLE NETSUITE, SANDBOX, South African Weather Service logo, a search box, and a help icon. Below the navigation bar is a main menu with the following items: Home, Activities, Leads, Opportunities, Customers, Forecast, Reports, and Analytics. The 'Leads' menu item is highlighted, and a dropdown menu is displayed. The dropdown menu contains the following items: Leads Overview, Relationships, Lead Reports, Leads, Contacts, and Search. The 'Relationships' menu item is highlighted, and a sub-menu is displayed. The sub-menu contains the following items: Leads, and Search. The 'Leads' sub-menu item is highlighted, and a further sub-menu is displayed. The further sub-menu contains the following items: New, and Search. The 'New' sub-menu item is highlighted. Red arrows point to the 'Leads' menu item in the main menu, the 'Relationships' menu item in the dropdown menu, the 'Leads' sub-menu item in the sub-menu, and the 'New' sub-menu item in the further sub-menu.



2.1.2 Step 2 – Creating the Lead

The screenshot shows the Oracle NetSuite interface for creating a lead. The top navigation bar includes 'ORACLE NETSUITE', 'SANDBOX', and a search bar. The user is logged in as '4 Shuaib Abed SOUTH AFRICAN WEATHER SERVICE - Administrator'. The main navigation menu includes 'Activities', 'Payments', 'Transactions', 'Lists', 'Reports', 'Analytics', 'Documents', 'Setup', 'Customization', 'Fixed Assets', 'SuiteSocial', and 'Support'. The 'Lead' form is displayed with the following fields:

- Primary Information:**
 - LEAD ID: To Be Generated
 - TYPE: COMPANY (selected), INDIVIDUAL
 - COMPANY NAME: [Text Field]
 - LEAD STATUS: LEAD-Unqualified (Dropdown)
 - COMMENTS: [Text Area]
 - TERMS: Paid in Advance (Dropdown)
- Email | Phone | Address:**
 - EMAIL: [Text Field]
 - PHONE: [Text Field]
 - ADDRESS: [Text Field] with a 'Map' button
- Relationships:** Communication, Address, Financial
- Contacts:** Partners
- UPDATE TRANSACTIONS

1 Lead form for Companies

The screenshot shows the Oracle NetSuite interface for creating a lead. The top navigation bar includes 'ORACLE NETSUITE', 'SANDBOX', and a search bar. The user is logged in as '4 Shuaib Abed SOUTH AFRICAN WEATHER SERVICE - Administrator'. The main navigation menu includes 'Activities', 'Payments', 'Transactions', 'Lists', 'Reports', 'Analytics', 'Documents', 'Setup', 'Customization', 'Fixed Assets', 'SuiteSocial', and 'Support'. The 'Lead' form is displayed with the following fields:

- Primary Information:**
 - LEAD ID: To Be Generated
 - TYPE: COMPANY, INDIVIDUAL
 - MR./MS.: [Text Field]
 - NAME: [Text Field]
 - JOB TITLE: [Text Field]
 - COMPANY NAME: [Text Field]
 - LEAD STATUS: LEAD-Unqualified (Dropdown)
 - COMMENTS: [Text Area]
 - TERMS: Paid in Advance (Dropdown)
- Email | Phone | Address:**
 - EMAIL: [Text Field]
 - PHONE: [Text Field]
 - ADDRESS: [Text Field] with a 'Map' button
- Relationships:** Communication, Address, Financial
- Contacts:** Business

2 Lead form for Individuals

Primary Information

- Select Company or Individual for the Type. This will
- In the Company Name field, enter the Company name of this Lead. (This Field is Mandatory *) if Company is selected as the Type
- If the Lead is an Individual, enter the Designation, Name, Initials, and Surname of the Lead. The Job Title, and Company Name are optional
- The Lead Status field allows us to track the status of this Lead.

- The Comments field is a free form field for any comments pertaining to the Lead.

Email, Phone and Address

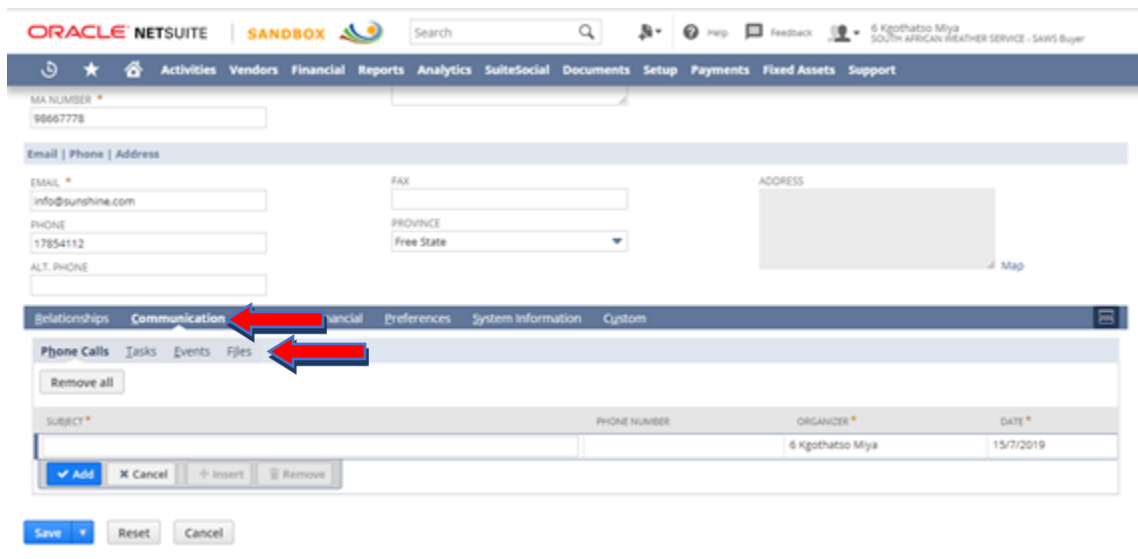
- Enter the Lead Email Address. (This Field is Mandatory *)
- Enter the Leads Phone number in the phone field . (This Field is Mandatory *)

Relationship subtab (only applicable to Companies)

- Under Contact, enter Lead contact person's name
- Enter the contact person Job title
- Enter the contact person email address
- Enter contact person main phone number
- Enter contact person role

Communication Subtab

- In this subtab, Communication between Lead and client can be stored.
- Under phone calls record all the between the Lead and client
- Under Task record the task
- Record the Events such as appointments or meetings



The screenshot shows the Oracle Netsuite interface for a lead record. The 'Communication' subtab is selected and highlighted with a red arrow. Below it, the 'Phone Calls' subtab is also highlighted with a red arrow. A table with columns for SUBJECT, PHONE NUMBER, ORGANIZER, and DATE is visible, with a row containing '6 Kgothatso Miya' and '15/7/2019'.

SUBJECT *	PHONE NUMBER	ORGANIZER *	DATE *
		6 Kgothatso Miya	15/7/2019



Address subtab

- Click on Edit

The screenshot shows the Oracle Netsuite interface for the 'Address' subtab. The 'EDIT' button is highlighted with a red arrow. The form contains the following fields:

- COMPANY: Consultant
- DATE: 26/7/2019
- COMMENTS: (empty text area)
- VENDOR APPROVAL STATUS: (dropdown menu)
- COMPANY NAME: Sunshine Enterprise LTD
- MA NUMBER: 98667778
- EMAIL: info@sunshine.com
- PHONE: 17854112
- ALT. PHONE: (empty)
- FAX: (empty)
- PROVINCE: Free State
- ADDRESS: (empty text area with a Map button)

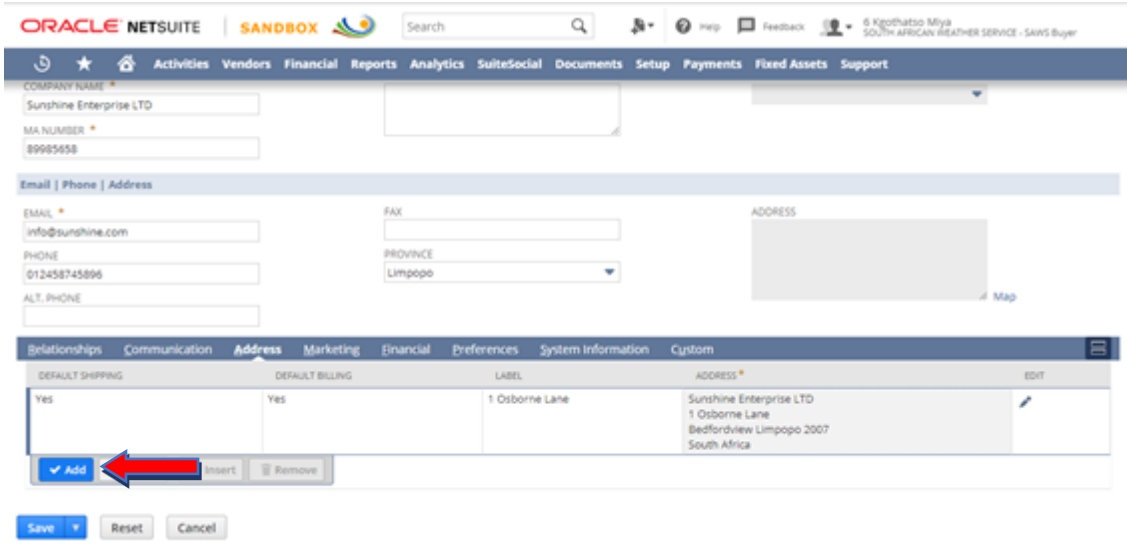
At the bottom, there is a table with columns: DEFAULT SHIPPING, DEFAULT BILLING, LABEL, ADDRESS, and EDIT. The EDIT column contains a pencil icon, which is highlighted with a red arrow. Below the table are buttons for Add, Cancel, Insert, and Remove. At the very bottom are Save, Reset, and Cancel buttons.

- Enter the Lead Address details
- Click on Ok to Save

The screenshot shows the 'Address' details form. The 'OK' button is highlighted with a red arrow. The form contains the following fields:

- COUNTRY: South Africa
- ATTENTION: (empty)
- ADDRESSEE: Sunshine Enterprise LTD
- PHONE: (empty)
- ADDRESS 1: (empty)
- ADDRESS 2: (empty)
- CITY: (empty)
- PROVINCE: (dropdown menu)
- POSTAL CODE: (empty)
- ADDRESS: Sunshine Enterprise LTD, South Africa
- Map button
- Override checkbox (unchecked)

- Click on Add, to Add the address.



ORACLE NETSUITE | SANDBOX | Search | Help | Feedback | 6 Kgothato Moya | SOUTH AFRICAN WEATHER SERVICE - SAWS Buyer

Activities Vendors Financial Reports Analytics SuiteSocial Documents Setup Payments Fixed Assets Support

COMPANY NAME
Sunshine Enterprise LTD

MA NUMBER
89985658

Email | Phone | Address

EMAIL
info@sunshine.com

PHONE
012458745896

ALT. PHONE


FAX

PROVINCE
Limpopo

ADDRESS

Map

Relationships Communication **Address** Marketing Financial Preferences System Information Custom

DEFAULT SHIPPING	DEFAULT BILLING	LABEL	ADDRESS *	EDIT
Yes	Yes	1 Osborne Lane	Sunshine Enterprise LTD 1 Osborne Lane Bedfordview Limpopo 2007 South Africa	

Financial Subtab

- Select the appropriate payment Term in the Terms field. "Paid in Advance" is the default, which will require a 100% deposit to be made before the order can be fulfilled.

Click on  to Save the Lead.

3 OPPORTUNITY MANAGEMENT

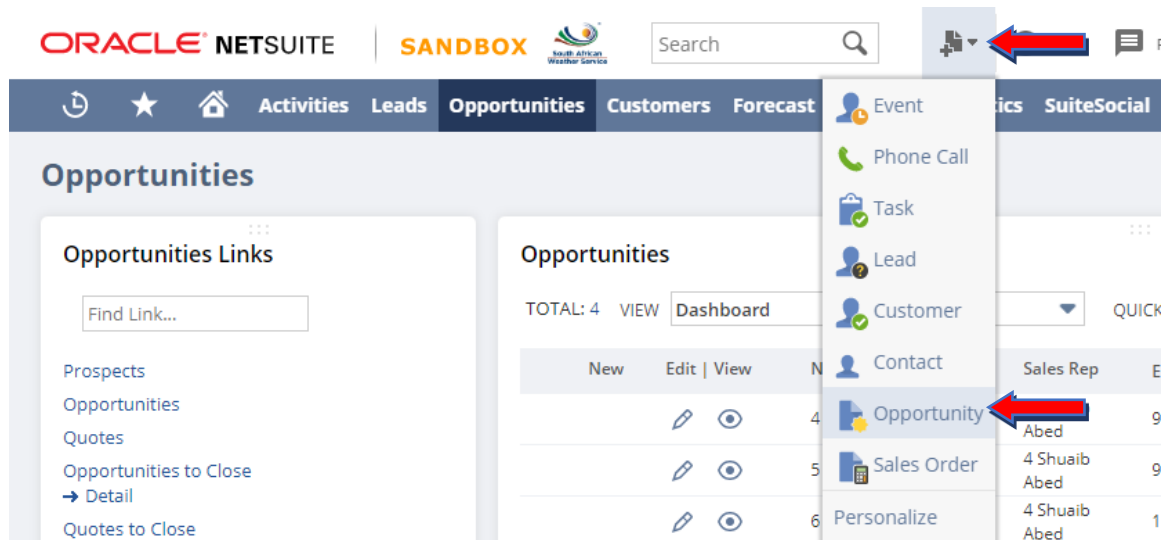
3.1 Working with Opportunities

An Opportunity represents the possibility of making a sale and can be created against a Lead, Prospect or Customer. It allows for the tracking of the

3.1.1 Creating the Opportunity

Go to **Opportunities > Transactions > Opportunities > New** to create a New Opportunity.

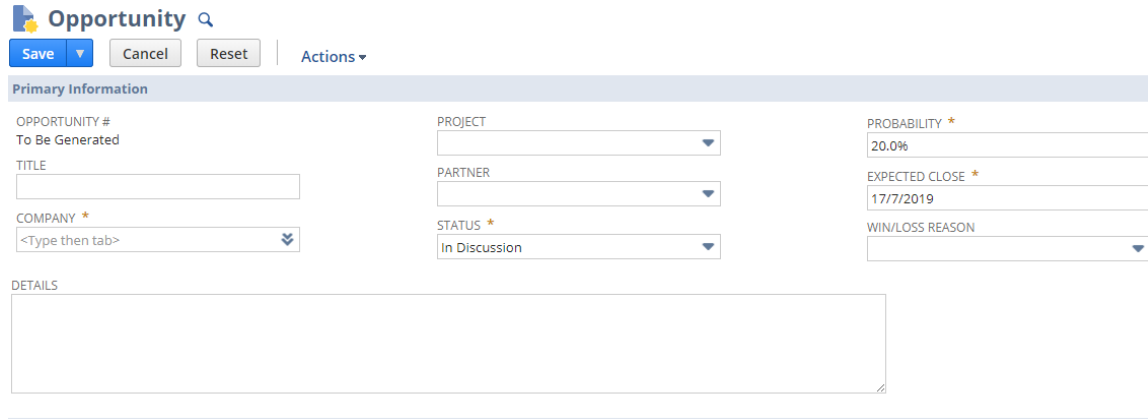
Alternatively use the Add button next to the Global Search to create a new Opportunity.



The screenshot shows the Oracle NetSuite interface. At the top, there are logos for ORACLE NETSUITE, SANDBOX, and South African Weather Service. A search bar is present. Below the navigation bar, the 'Opportunities' page is displayed. On the left, there is a sidebar with 'Opportunities Links' including Prospects, Opportunities, Quotes, Opportunities to Close, and Quotes to Close. The main content area shows a table of Opportunities with columns for 'New', 'Edit', and 'View'. A dropdown menu is open, showing options like Event, Phone Call, Task, Lead, Customer, Contact, Opportunity, Sales Order, and Personalize. A red arrow points to the 'Add' button in the top right corner, and another red arrow points to the 'Opportunity' option in the dropdown menu.

3.1.2 Entering Opportunity Information

The minimum information required to create an Opportunity is a Company. This could be a Lead, Prospect, or Customer. Other information captured will assist in the recognition and the tracking of the Opportunity.



The screenshot shows a web form titled "Opportunity" with a search icon. Below the title are buttons for "Save", "Cancel", "Reset", and "Actions". The form is divided into two main sections: "Primary Information" and "DETAILS".

Primary Information

OPPORTUNITY # To Be Generated	PROJECT [Dropdown]	PROBABILITY * 20.0%
TITLE [Text Field]	PARTNER [Dropdown]	EXPECTED CLOSE * 17/7/2019
COMPANY * <Type then tab> [Dropdown]	STATUS * In Discussion [Dropdown]	WIN/LOSS REASON [Dropdown]

DETAILS

[Large Text Area]

Primary Information

- Title – a brief title to identify the opportunity
- Company – mandatory Lead, Prospect or Customer
- Details – further detail about the Opportunity
- Status – current Status of the Opportunity
- Probability – percentage chance of closing defaulting to 20%
- Expected Close – date by which this Opportunity is expected to reach its conclusion
- Win/Loss Reason – to be defined

Forecasting

- The Projected Total is calculated from the Item Lines entered, or the range specified.
- Select the forecast category you want this opportunity to appear in. If you do not want this opportunity to appear in the forecast, select Omitted.
- The Weighted total is calculated based on the progress of the Opportunity defined in the Status

Classification

The Cost Centre represents the Department and the Location represents the possible inventory Location **to ship the product from**

Items

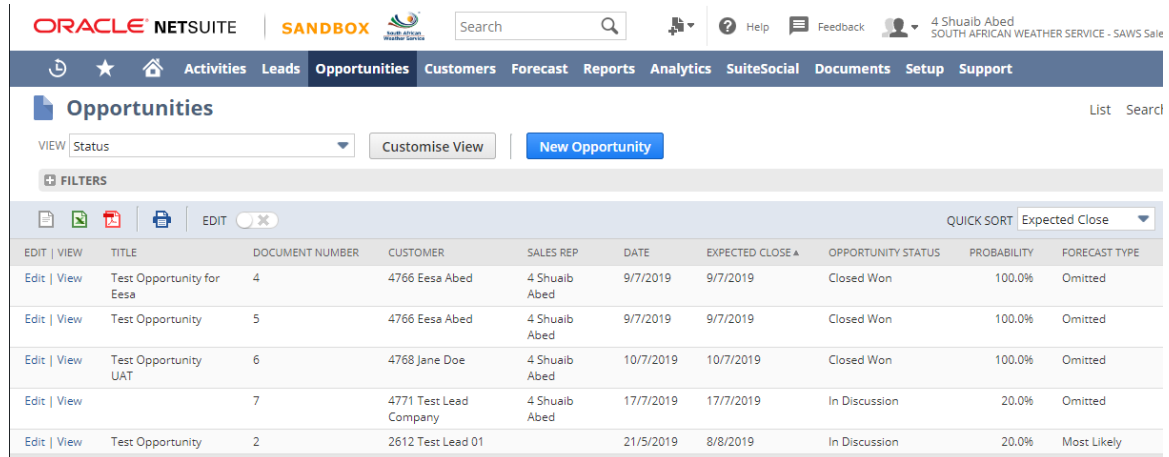
Capture the possible sale details in terms of items and price. This is helpful if we wish to convert this opportunity to a Quote.

Click on  to Save the Opportunity.

3.1.3 Updating the Opportunity

The Opportunity will need to be maintained and finalised as activities progress. This will require the Opportunity to be edited.


Go to **Opportunities > Transactions > Opportunities** to create a go to the list of Opportunities.



The screenshot shows the Oracle NetSuite interface for the Opportunities page. The top navigation bar includes 'Activities', 'Leads', 'Opportunities', 'Customers', 'Forecast', 'Reports', 'Analytics', 'SuiteSocial', 'Documents', 'Setup', and 'Support'. The 'Opportunities' section is active, showing a 'VIEW' dropdown set to 'Status', a 'Customise View' button, and a 'New Opportunity' button. Below this is a 'FILTERS' section and a table of opportunities. The table has columns for 'EDIT | VIEW', 'TITLE', 'DOCUMENT NUMBER', 'CUSTOMER', 'SALES REP', 'DATE', 'EXPECTED CLOSE', 'OPPORTUNITY STATUS', 'PROBABILITY', and 'FORECAST TYPE'. The table contains five rows of test data.

EDIT VIEW	TITLE	DOCUMENT NUMBER	CUSTOMER	SALES REP	DATE	EXPECTED CLOSE	OPPORTUNITY STATUS	PROBABILITY	FORECAST TYPE
Edit View	Test Opportunity for Eesa	4	4766 Eesa Abed	4 Shuaib Abed	9/7/2019	9/7/2019	Closed Won	100.0%	Omitted
Edit View	Test Opportunity	5	4766 Eesa Abed	4 Shuaib Abed	9/7/2019	9/7/2019	Closed Won	100.0%	Omitted
Edit View	Test Opportunity UAT	6	4768 Jane Doe	4 Shuaib Abed	10/7/2019	10/7/2019	Closed Won	100.0%	Omitted
Edit View		7	4771 Test Lead Company	4 Shuaib Abed	17/7/2019	17/7/2019	In Discussion	20.0%	Omitted
Edit View	Test Opportunity	2	2612 Test Lead 01		21/5/2019	8/8/2019	In Discussion	20.0%	Most Likely

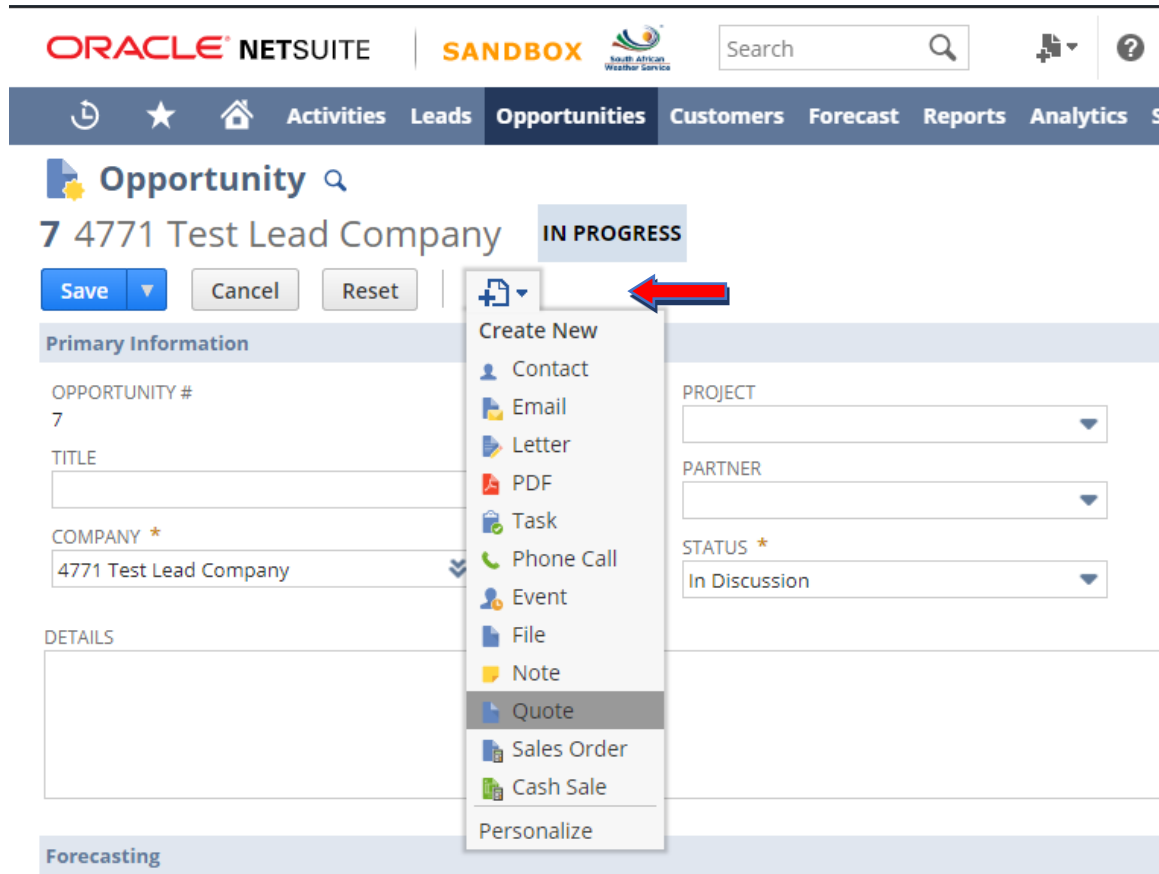
- Click on Edit to edit an Opportunity
- Update as required. Updating the Status will affect the Weighted total.
- The Opportunity can be Closed using this method should it not materialise into a Quote

Click on  to Save the changes to the Opportunity.


3.1.4 Creating a Quote from an Opportunity

NetSuite allows Quotes to be created manually or to be created from Opportunities.

- Go to the Opportunity as you would to edit it. You can also select View instead of Edit (recommended)



The screenshot shows the NetSuite interface for an Opportunity. The top navigation bar includes 'ORACLE NETSUITE', 'SANDBOX', and 'South African Weather Service'. The main navigation bar has tabs for 'Activities', 'Leads', 'Opportunities', 'Customers', 'Forecast', 'Reports', and 'Analytics'. The 'Opportunities' tab is active, and the page title is 'Opportunity'. Below the title, there is a search icon and the text '7 4771 Test Lead Company' with a status indicator 'IN PROGRESS'. A 'Save' button with a dropdown arrow is visible. A 'Create New' menu is open, listing options: Contact, Email, Letter, PDF, Task, Phone Call, Event, File, Note, Quote (highlighted), Sales Order, and Cash Sale. A red arrow points to the 'Quote' option. The 'Primary Information' section shows 'OPPORTUNITY #' as 7, 'TITLE' as an empty field, and 'COMPANY' as '4771 Test Lead Company'. The 'DETAILS' section is empty. The 'Forecasting' section is also visible at the bottom.

- From the Create New menu on for the Opportunity (just below the Company and Status as indicated), select Quote.
- You will be redirected to a Quote form populated with the details from the Opportunity.
- Click on  to Save the Quote.
- If the Company is a Lead, it will now be moved to a Prospect.

4 QUOTE MANAGEMENT

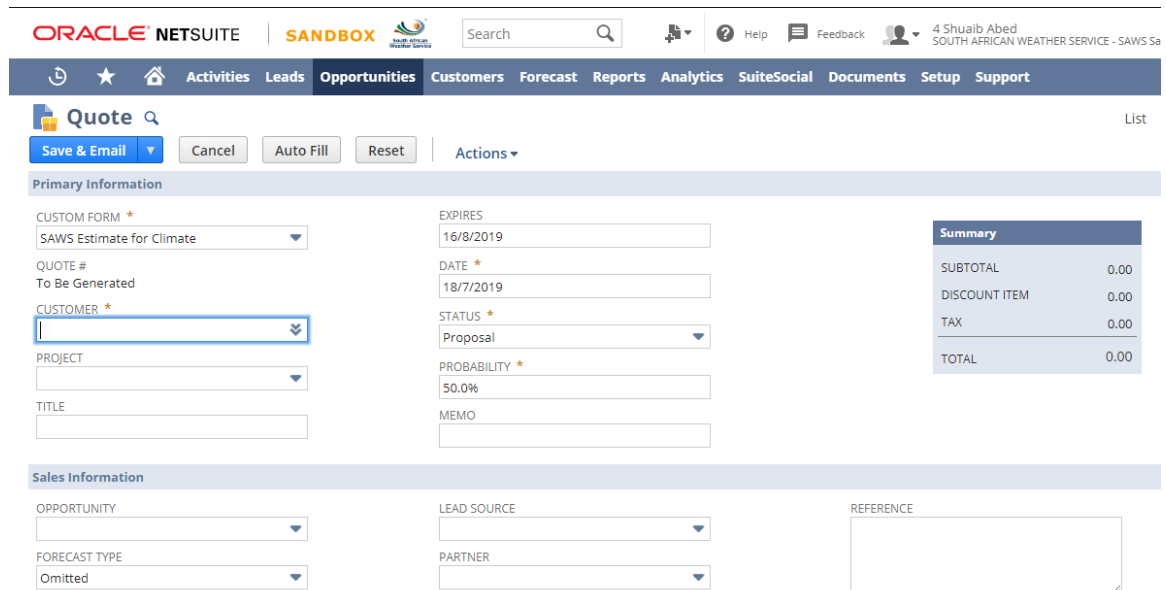
Quotes are transactions created within NetSuite to generate a Quote or Proforma Invoice. This is an essential step in the SAWS process.

4.1 Working with Quotes

A Quote can either be created manually or generated from an Opportunity as in the previous section.

4.1.1 Creating the Quote

Go to **Opportunities > Transactions > Quotes > New** to create a New Quote.



Primary Information

CUSTOM FORM *	SAWS Estimate for Climate	EXPIRES	16/8/2019	<table border="1"> <thead> <tr> <th colspan="2">Summary</th> </tr> </thead> <tbody> <tr> <td>SUBTOTAL</td> <td>0.00</td> </tr> <tr> <td>DISCOUNT ITEM</td> <td>0.00</td> </tr> <tr> <td>TAX</td> <td>0.00</td> </tr> <tr> <td>TOTAL</td> <td>0.00</td> </tr> </tbody> </table>	Summary		SUBTOTAL	0.00	DISCOUNT ITEM	0.00	TAX	0.00	TOTAL	0.00
Summary														
SUBTOTAL	0.00													
DISCOUNT ITEM	0.00													
TAX	0.00													
TOTAL	0.00													
QUOTE #	To Be Generated	DATE *	18/7/2019											
CUSTOMER *		STATUS *	Proposal											
PROJECT		PROBABILITY *	50.0%											
TITLE		MEMO												

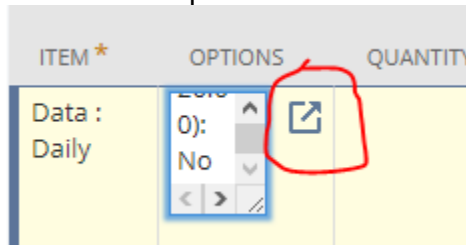
Sales Information

OPPORTUNITY	LEAD SOURCE	REFERENCE
FORECAST TYPE	PARTNER	
Omitted		

- Enter the Customer and review all other fields in the Primary Information. Ideally this should not be changed, with the exception of the Memo field, which is non printing and will serve as a reference.
- Complete the Reference field with the necessary references to appear on the quote
- Complete the Item Subtab with the items, prices etc. for the Quote.

- For Items with Options for Climate Sales, where the options are used to recalculate the price,

- Click on the Options List Box



- Select the Options and then click on SUBMIT. If you want the system to calculate the number of months, then populate the Date From and Date To fields, or alternatively populate the “No of Months, Grid Points, Maps etc.” field with the number of Months

Set Options

DESCRIPTION

NO OF STATIONS, AREAS, POINTS, REGIONS

DATE FROM

DATE TO

NO OF MONTHS, GRID POINTS, MAPS ETC.

CLOUD AMOUNT (AT 08:00, 14:00 & 20:00)

CLOUD TYPES (AT 08:00, 14:00 & 20:00)

DEW-POINT TEMPERATURE (AT 08:00, 14:00 & 20:00)

MAXIMUM TEMPERATURE



- After clicking on Submit, the line must be accepted by clicking the OK button for the line

Items Shipping Billing Accounting Relationships Sales Team Communication

Refresh Items from Project Clear All Lines

ITEM *	OPTIONS	QUANTITY	DESCRIPTION	AMOUNT
Data : Daily	0): No	1	Description: Test Item No of Stations, Areas, Points, Regions: 2 Date From: 19/9/2019 Date To: 3/7/2020 Options: Cloud amount (at 08:00, 14:00 & 20:00) Cloud types (at 08:00, 14:00 & 20:00) Dew-point temperature (at 08:00, 14:00 & 20:00) (more...)	1,602.00

OK Cancel Make Copy Insert Remove

+ Add Row

- Check that the price and description are correct.

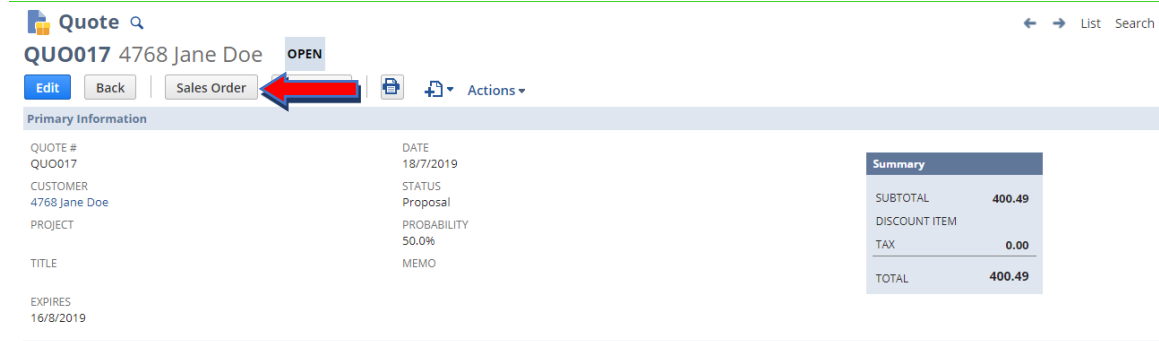
- Click on **Save & Print** to Save the Quote and produce a printed version.

5 CREATING ORDERS

Upon receipt of the necessary confirmation, a Quote can be used to generate a Sales Order.

5.1 Working with Quotes


Sales Orders should only be generated from Quotes as per the SAWS guidelines.



The screenshot shows a web interface for managing quotes. At the top, there is a search bar with 'Quote' and a magnifying glass icon. Below it, the quote ID 'QUO017' and customer name '4768 Jane Doe' are displayed, along with an 'OPEN' status indicator. A navigation bar contains buttons for 'Edit', 'Back', 'Sales Order', and 'Actions'. A red arrow points to the 'Sales Order' button. Below the navigation bar, there is a 'Primary Information' section with a table of details and a 'Summary' table.

Primary Information	
QUOTE #	DATE
QUO017	18/7/2019
CUSTOMER	STATUS
4768 Jane Doe	Proposal
PROJECT	PROBABILITY
	50.0%
TITLE	MEMO
EXPIRES	
16/8/2019	

Summary	
SUBTOTAL	400.49
DISCOUNT ITEM	
TAX	0.00
TOTAL	400.49

- Click on the Sales Order button to generate a Sales Order
- You will be directed to a screen with a Sales Order containing the information on the Quote
- Click on the  button to Save the Sales Order. If this is a customer that needs to pay before receiving any service or goods, then an email will be sent to Debtors to create the deposit. **ONLY CREATE THE SALES ORDER ONCE THE PROOF OF PAYMENT HAS BEEN RECEIVED.**

Once debtors have created a receipt, you will receive an email with a link for you to fulfill the order.