South African Weather Service

Lead to Order Process
Training Manual

Document Review and Distribution

Document location

Revision history

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Document review

This document is deemed official only if the reviewers have signed below

Reviewer Name	Signature	Role	Date

Document distribution

Version	Name	Date	Email Address

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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 initated 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.

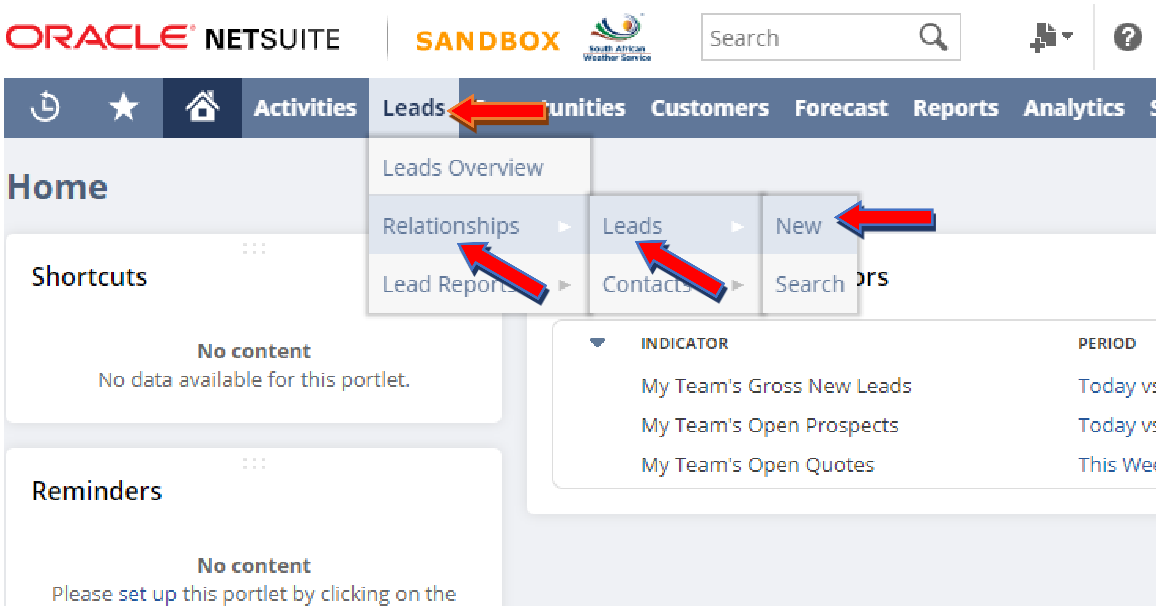
In the SAWS context, a Quote is a mandatory sales document.

2.1 Working with Leads

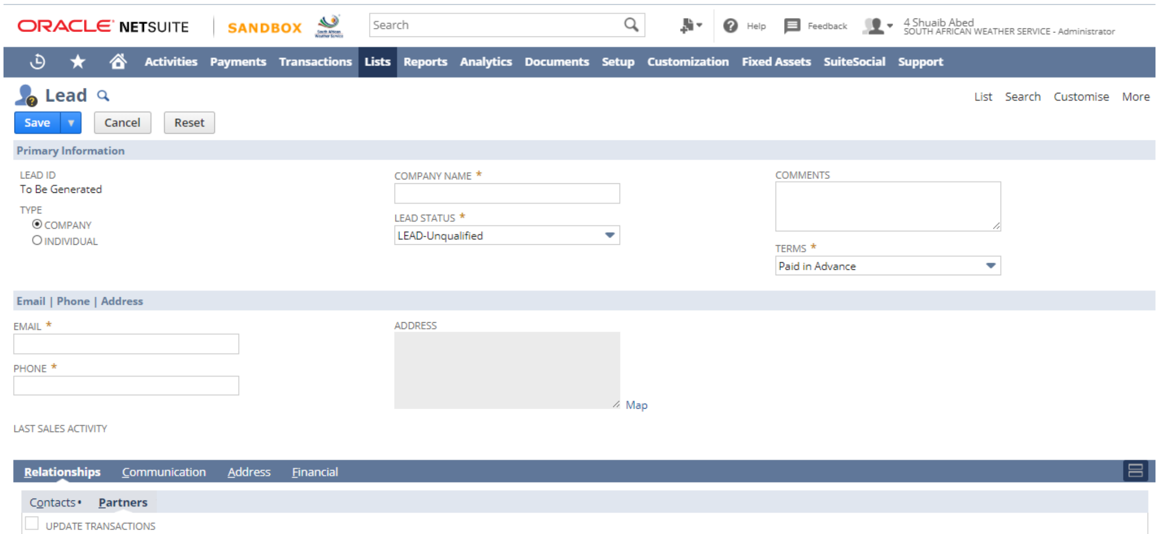
A Lead is created upon a prospective customer's first interaction with the company. The customer can be either an individual or a company.

2.1.1 Navigating

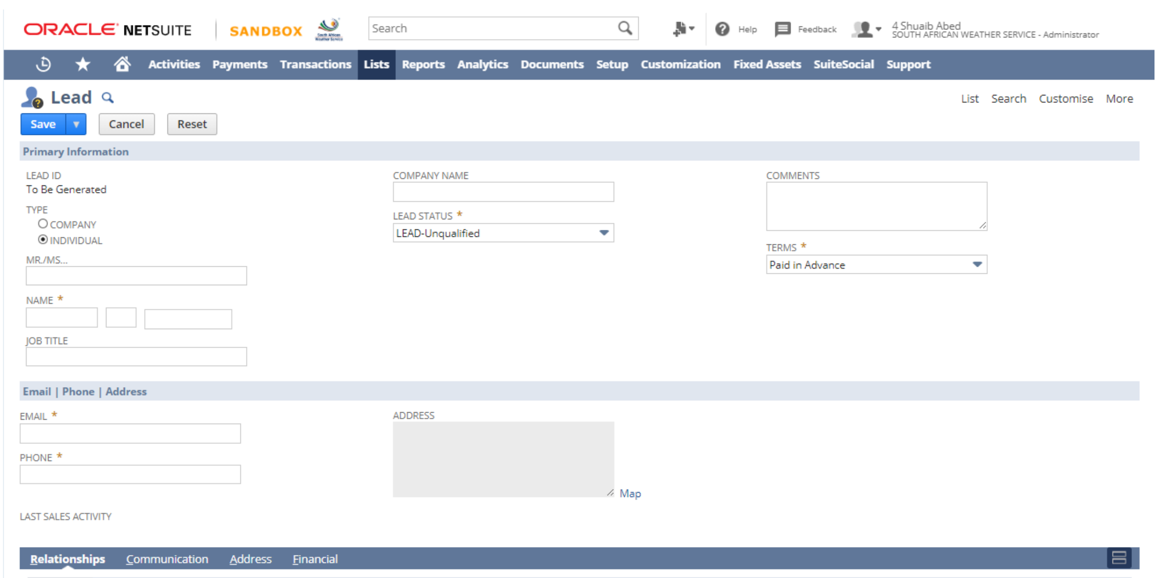
- On the menu bar, click on Leads, a drop down menu will display.
- Click on Relationships, then on Leads, and finally on New



2.1.2 Step 2 – Creating the Lead



1 Lead form for Companies



2 Lead form for Individuals

<u>Primary Information</u>

- 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

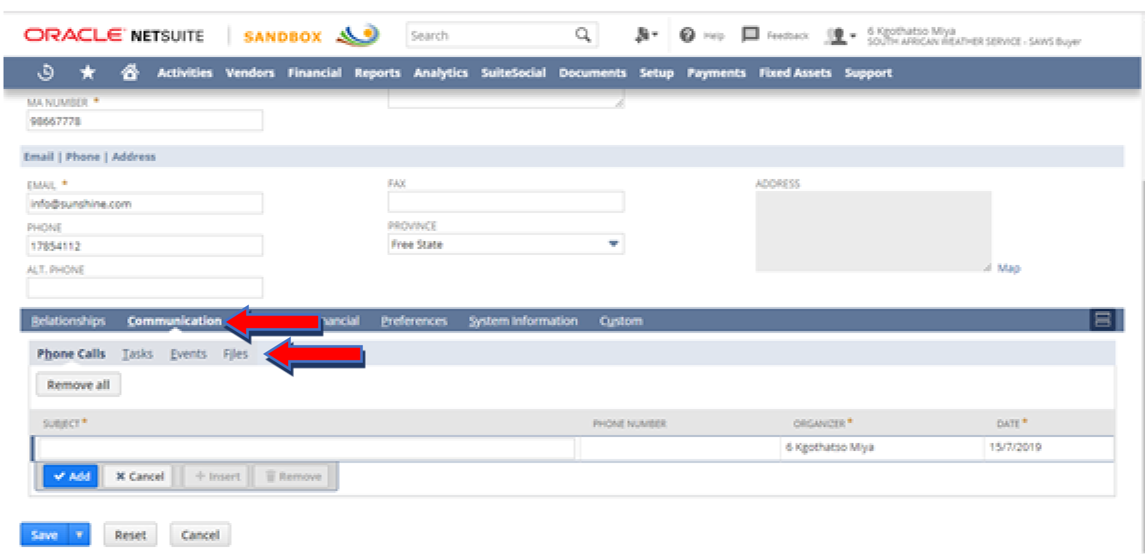
- Enter the Lead Email Address. (This Field is Mandatory *)
- Enter the Leads Phone number in the phone field . (This Field is Mandatory *)

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

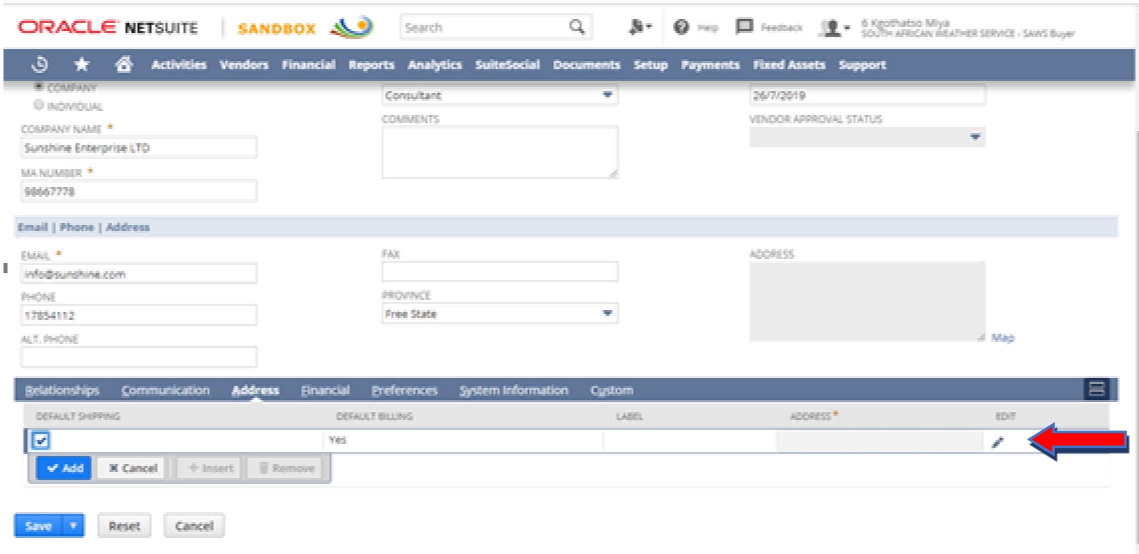
Communication Subtab

- 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

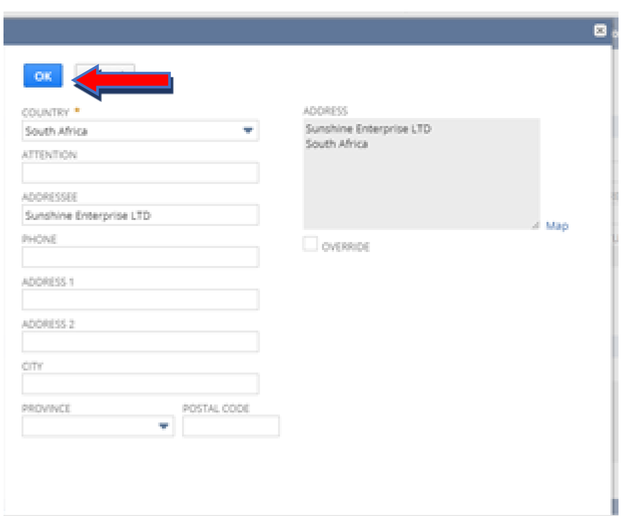


Address subtab

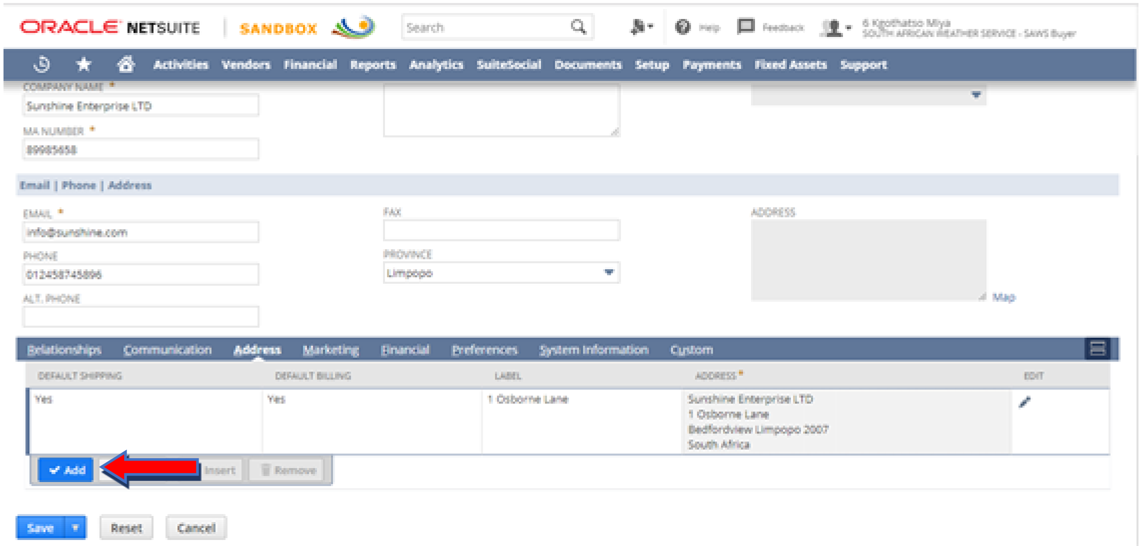
- Click on Edit



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



- Click on Add, to Add the address.



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

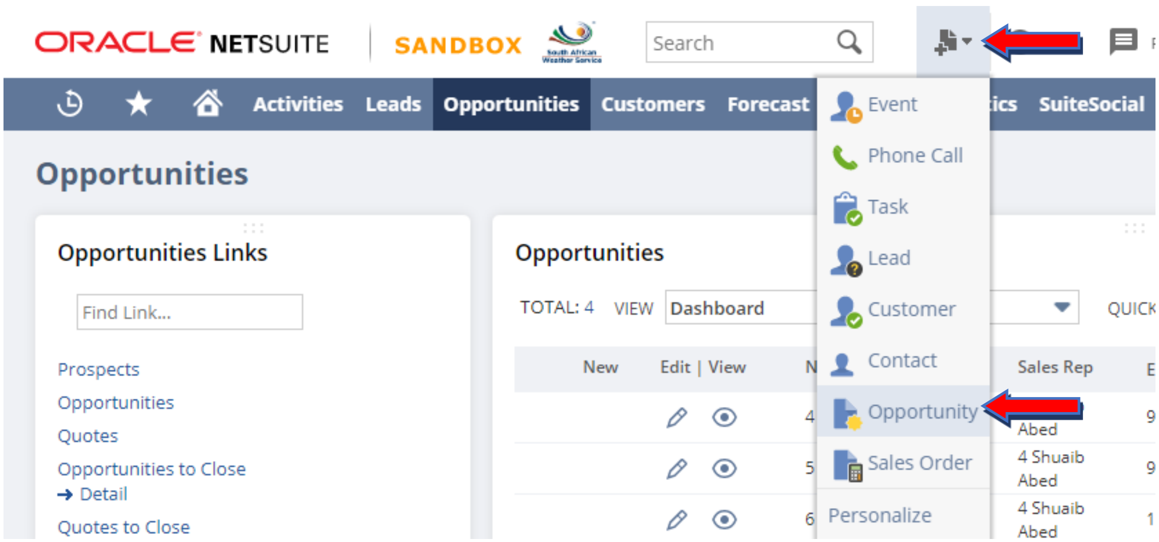
3.1 Working with Opportunities

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

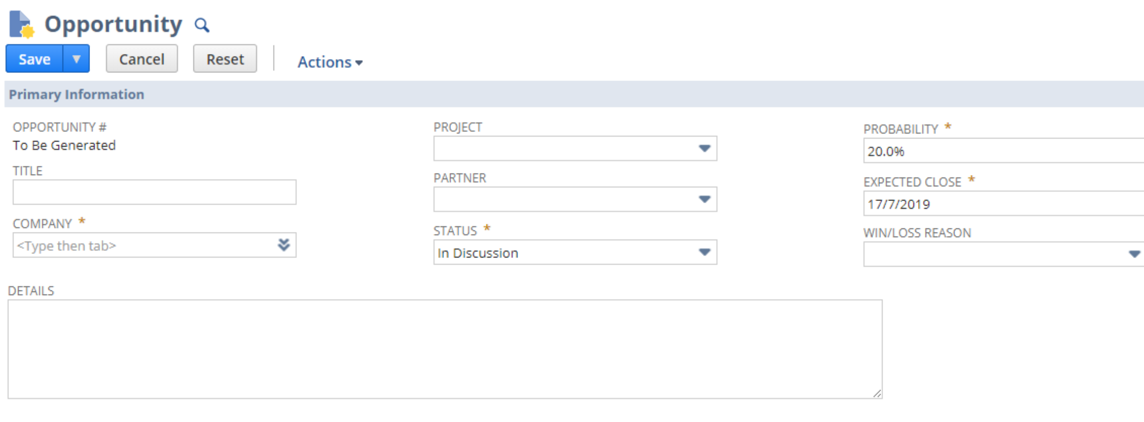
Go to **Opportunities > Transactions > Opportunities > New** to create a New Opportunity.

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



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.



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.

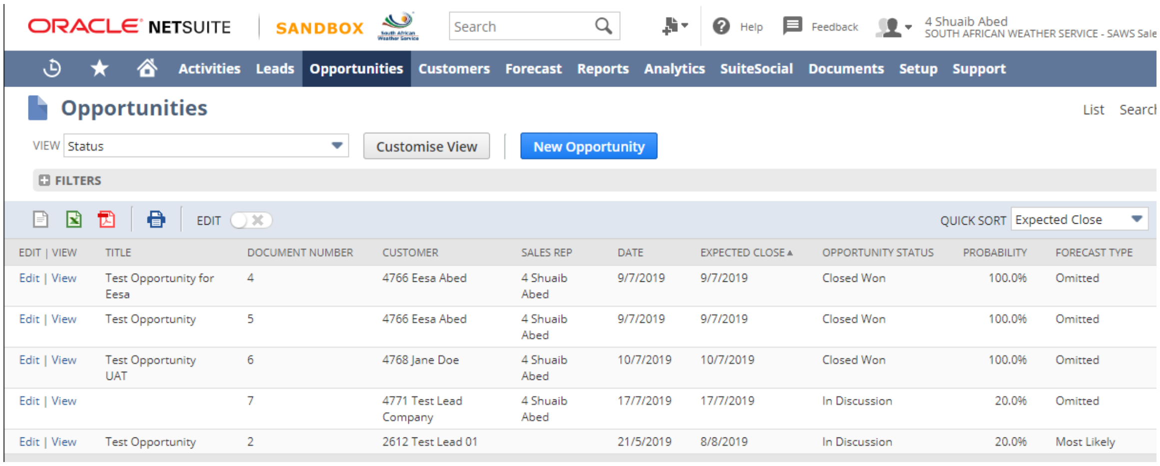
Click on 

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.



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

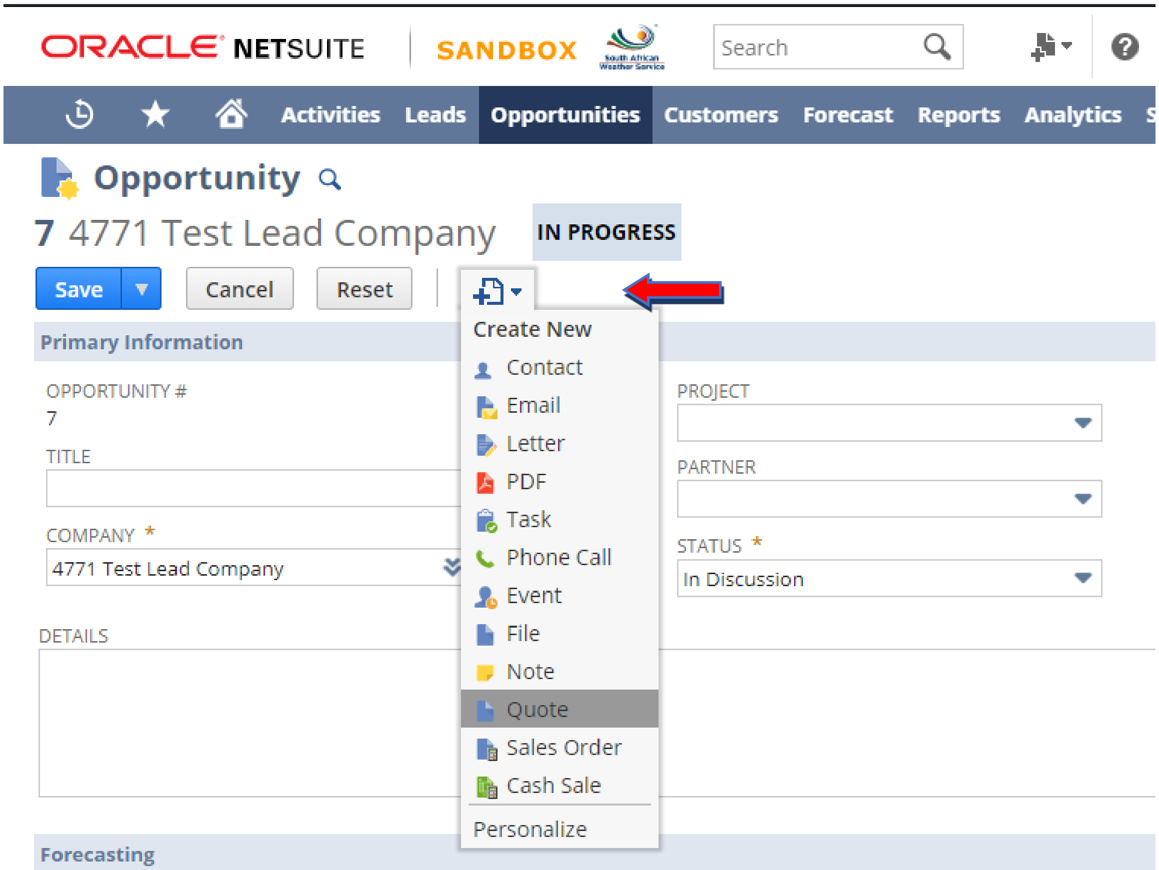
Click on 

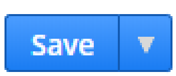
to Save the changes to the Opportunity.

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)



- 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

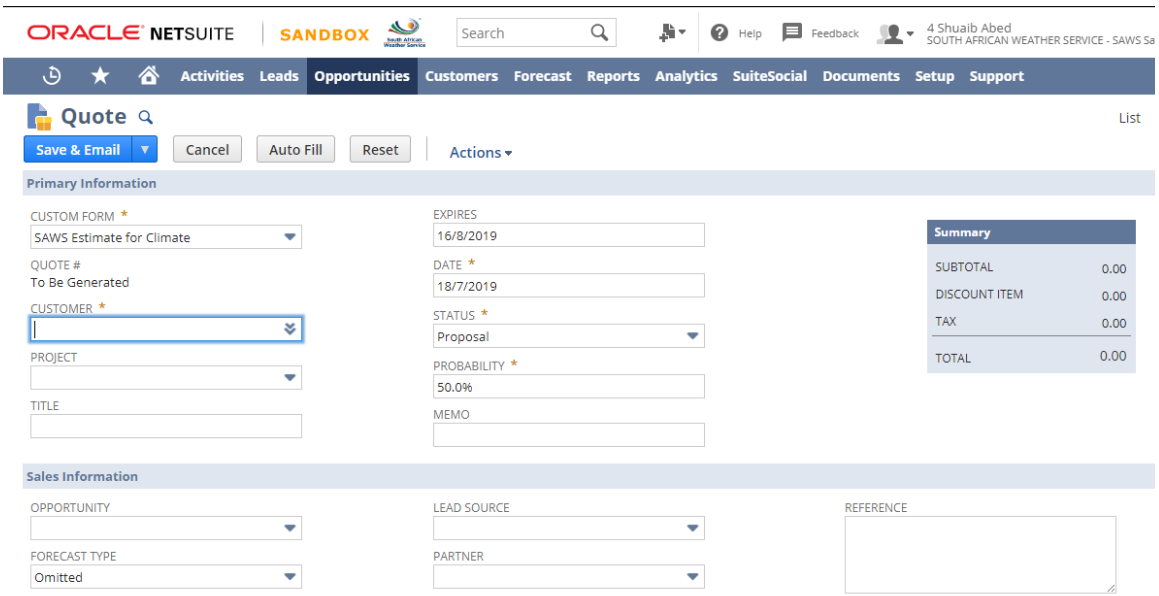
Quotes are transactions created within NetSuite to generate a Quote or Proforma Invoice. This is an essential step in the SAWS process.

4.1 Working with Quotes

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

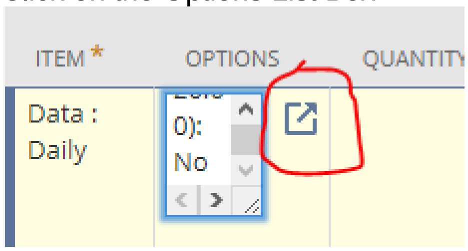
4.1.1 Creating the Quote

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

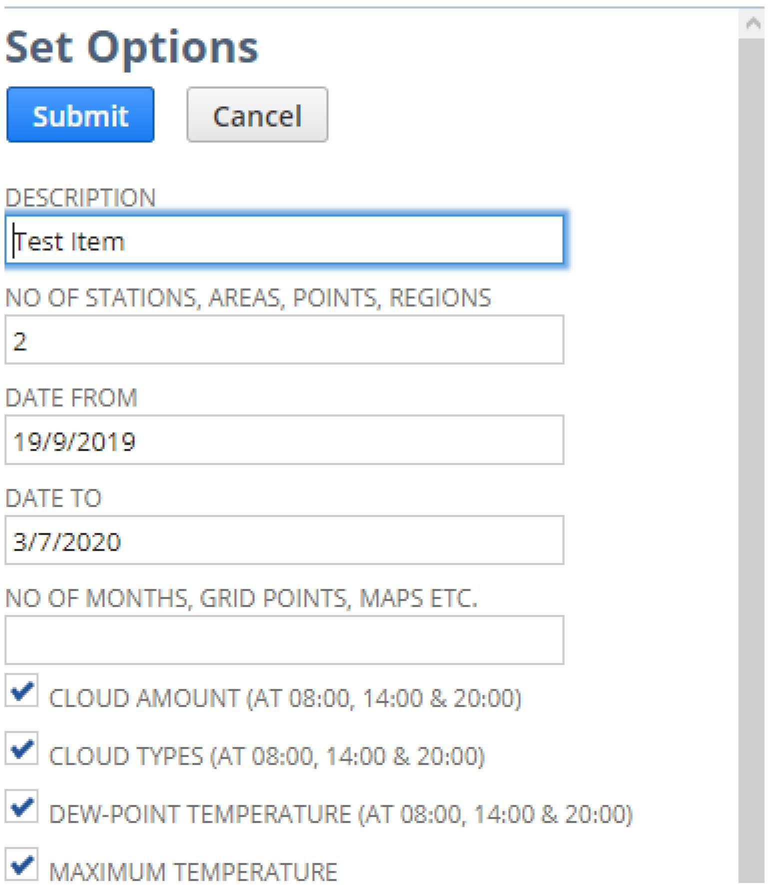


- Enter the Customer and review all other fields in the Primary Information. Ideally this should not be changed, with the exception of the Memo field, which is non printing and will serve as a reference.
- Complete the Reference field with the necessary references to appear on the quote
- Complete the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

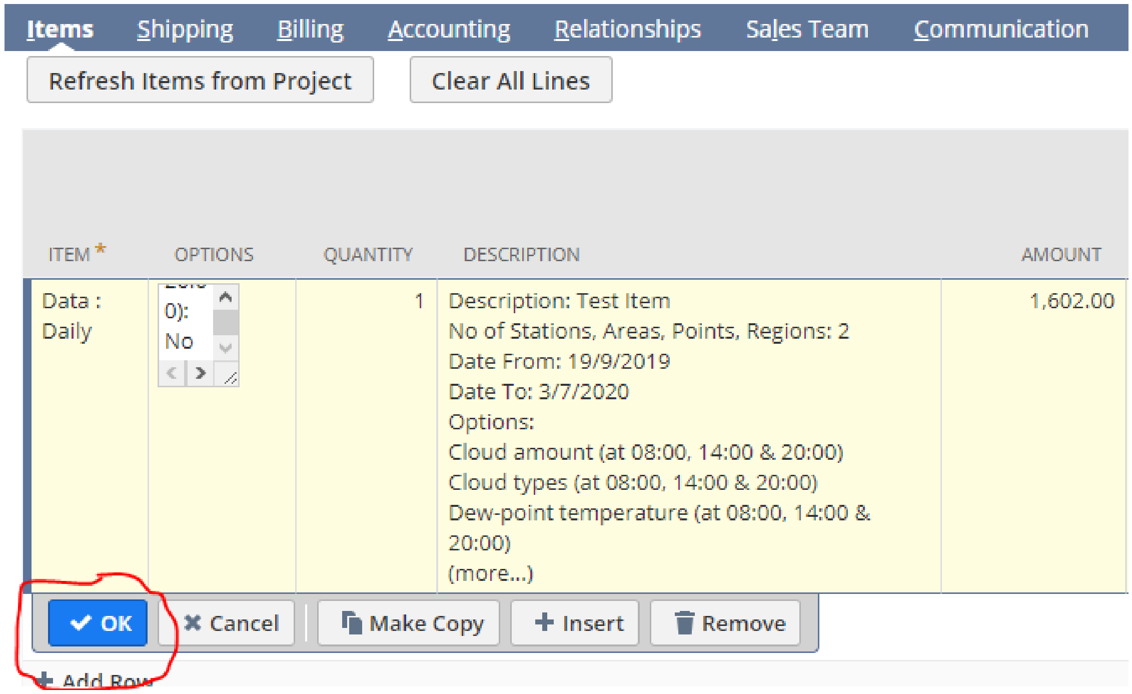
- For Items with Options for Climate Sales, where the options are used to recalculate the price,
  - Click on the Options List Box



  - 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



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



- Check that the price and description ar correct.

➢ Click on 

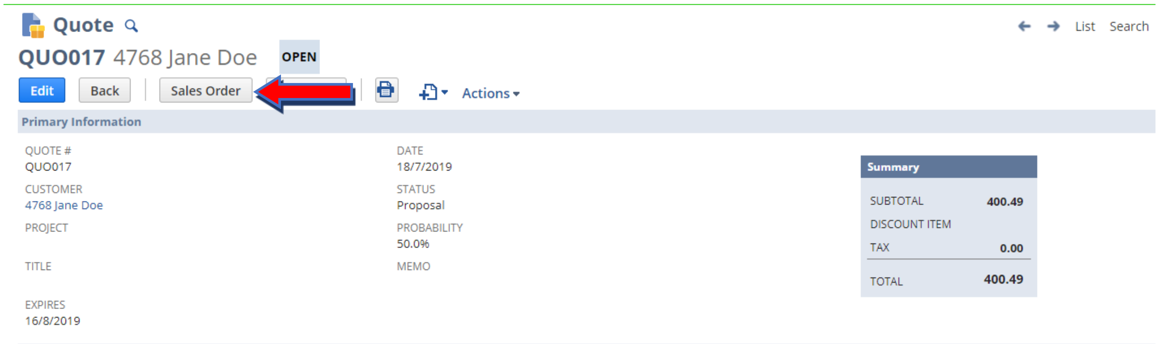
to Save the Quote and produce a printed version.

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.



- 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. **<u>ONLY CREATE THE SALES ORDER ONCE THE PROOF OF PAYMENT HAS BEEN RECEIVED.</u>**

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