

Oracle NetSuite CRM Sales

I. Introduction

Overview of Oracle NetSuite Sales

Key features and benefits

Target audience

II. Managing Customers

Creating customer records

Viewing customer transactions

Managing customer data and preferences

III. Sales Order Management

Real-time access to prospect, customer, opportunity and order records.

Manage opportunities

Sales pipeline.

Convert opportunities into quotes and sales orders.

IV. Quote and Order Management

Convert quotes into approved sales orders.

Automatically process with back-end financials.

Accelerate order management with online approval and automated workflows.

V. Product Management and Pricing

Setting up products.

Pricing and discounting

Automated tax and shipping-rate calculations

VI. Sales Forecasting and Reporting

Sales Forecasting and Quota Management

Identify opportunities, quotes and estimates.

Probability-based forecasting

Analyze actual sales and recurring revenue

VII. Reporting and Analytics

Real-time dashboards

Access sales goals