



# NetSuite CRM+

## NetSuite CRM+ offers the industry's first and only:

- Order Management
- Upsell/Cross-Sell
- Partner Relationship Management
- Incentive Management
- Project Tracking
- Customer Portal
- Web Hosting, Analytics, Intranet
- Xtreme List Editing

## NetSuite CRM+ functionality includes\*:

- Sales Force Automation
- Contact Management
- Marketing Automation
- Customer Service and Support
- Reporting and Analysis
- Offline Sales Client
- Complete Customization and Configuration
- + Integrated Order Management
- + Upsell/Cross-sell Automation
- + Incentive Management
- + Project Tracking
- + Customer Portal
- + Partner Relationship Management
- + Website Hosting & Analytics

\*Some features sold in add-on modules

## Beyond Traditional CRM: Complete Customer Lifecycle Management

NetSuite CRM+ goes beyond traditional CRM's simple prospect-centric view to provide companies with a customer-centric view to manage initial and on-going relationships over the phone, in person, or on the Web. NetSuite CRM+ is the only hosted CRM application that integrates order management, partner management, incentive management, project tracking as well as website hosting and analytics, giving businesses large and small seamless customer processes and clear lines of visibility across traditional and online channels.

NetSuite CRM+ includes all the powerful capabilities found in NetSuite CRM. Both products include Sales Force Automation, Marketing Automation, Customer Support & Service, flexible customization through NetFlex, and more. And both products include the best opportunity management and forecasting capabilities in the industry.

### NetSuite CRM+ is only Web-based CRM system that:

- **Provides a true 360 degree view of all customer data and customer interactions**, including complete visibility into all financial transactions and website interactions without any integration required. Now a single view of customer information is available to everyone in your company who needs it.
- **Allows you to sell to both prospects and current customers equally effectively.** Other CRM systems focus on managing prospects, and do not have enough integrated information or tools to manage and upsell existing customers.
- **Automates the entire customer lifecycle**, from a "suspect" browsing a business' Web site, to an interested lead, to a qualified prospect, to a customer who has actually placed an order, to servicing that customer and finally, to guiding that customer to re-purchase.
- **Allows salespeople to take real orders from customers quickly and easily**, with an integrated Order Management system.
- **Shows full purchase histories for your customers** without requiring complex integrations with your accounting/ERP system.
- **Includes powerful, automatic upsell and cross-sell capabilities**, helping you to help you sell more — and more effectively — to your existing customers.
- **Offers complete Partner Relationship Management.** Now you can treat your channel partners as an extension of your direct sales team — seamlessly.
- **Tracks commissions automatically and accurately**, without requiring you or your salespeople to use spreadsheets.
- **Fully encompasses the Web and e-mail marketing.** NetCRM+ incorporates your Web site into the selling process, by tracking all customer interactions on the Web and by providing a comprehensive self-service customer portal.
- **Provides better, more accurate forecasts.** Booked orders can be finally seen in forecasts, your forecasts have greatly increased reliability, predictability and accuracy. And the "actuals" information in forecast vs. actual reports is now based on real sales data.
- **Shows you true marketing effectiveness and ROI.** Other CRM systems do not capture the details of what a customer has purchased, they frequently provide incomplete and incorrect results for marketing and sales campaigns. With no record of what or how much has been ordered by each customer, marketing has no way to know if the leads generated are actually converting to customers.

 Find out more: contact NetSuite, Inc. at 1-877 NETSUITE or visit [www.netcrm.com](http://www.netcrm.com)

# NetSuite CRM+

## Real-Time Dashboards

### Real-Time Dashboards

The NetSuite CRM+ Real-Time Dashboard provides data from all your departments, so your executives and employees can spend more time analyzing and acting on data and less time gathering it. Plus, the Dashboard offers highly customizable graphical reports and snapshots, enabling you to drill down into the information for deeper insight. You can access key performance indicators (KPIs), such as outstanding forecast, new orders, support cases, accounts receivable, and items to ship, anytime and anywhere. As a result, you can accelerate your business decisions and sharpen your competitive edge.

### Prepackaged Roles and Drag-and-Drop Capability

NetSuite CRM+'s Real-Time Dashboard comes with 15 prepackaged roles and unique drag-and-drop capabilities, giving each employee within your company access to just the right information and tools. Whether you are the CEO, a Sales Executive, Finance Manager, Support Manager or Advertising Assistant, NetSuite provides you the real-time information and tools most relevant to your job function.

### Report Drill-Through and Customization

In addition to over 100 standard reports in NetSuite CRM+, our reporting tools allow you to customize reports or create them "from scratch", generate graphs, export data as CSV files, and view the reports in Microsoft Word and Excel. Addressing the needs of all your users, the Report Composer offers both a basic and advanced mode. Basic mode makes it easy for users with simpler reporting needs to generate the reports they need quickly and easily. In contrast, the advanced mode provides rich reporting flexibility; for example, users can add filters to exclude certain data or add columns to combine data.

NetSuite CRM+ also supports robust business intelligence by incorporating Advanced Analytics. This feature enables users to mine database data directly through ODBC tools and use their choice of business intelligence packages, such as Business Objects.

## NetFlex: Customization, Extension and Verticalization

NetSuite's NetFlex technology platform customizes and extends NetSuite CRM+ to meet your specific company and industry requirements for personalization, business processes and best practices. And with NetFlex AppBuilder, you can build entire applications hosted within NetSuite.

### NetFlex Web Services

Provide a standardized way to access data and business processes in NetSuite CRM+ and makes it easy to enhance, extend, and integrate NetSuite CRM+ — the system of record — with other subordinate and legacy systems. NetFlex Web Services utilizes an XML-based interface built on the Simple Object Access Protocol (SOAP) standard defined by the W3C organization. Therefore, any platform that supports the SOAP standard such as Java and Microsoft .NET can be used to generate NetSuite CRM+ business objects for integration between systems.

### NetFlex Customization

Point and click personalization and configuration all managed in-system. Personalization allows for custom role-based Dashboards containing search summary analysis and intelligent metrics that can be tailor-made to match a business right down to the corporate branding and application color schemes. Configuration allows industry and business specific terminology to be applied throughout NetSuite CRM+ by re-naming standard objects such as Customer to Client. Standard objects can also be customized with the addition of fields to track additional data points. These custom fields can be organized on custom forms that utilize proven user interface elements such as sub-tabs. Custom fields can also be added to customized list views, leading to convenient eXtreme list editing capabilities. Additionally, Published Tabs can be created to share information, documents and other files for purposes such as Intranets and collaboration portals.

### NetFlex AppBuilder

A toolset of Custom Records, Custom Center Tabs and Custom Code which allow for entire applications to be built and hosted within NetSuite CRM+, providing all the benefits of a robust application architecture and on-demand hosting efficiencies. Custom Records let businesses fundamentally alter NetSuite CRM+'s Web-native, on-demand data structure with the point-and-click addition of database tables. NetSuite CRM+ is the first and only on-demand solution to support one-to-one, one-to-many, and many-to-many data relationships of both standard and custom records. Custom Center Tabs allow the user interface to be extended with new tabs that contain navigation links and real-time Dashboards for custom records and standard records alike. Powerful Custom Code is managed in-system for process validation, calculations and process flow automation. It's made simpler and ultimately more manageable because standards-based JavaScript is utilized — not proprietary tools that make other vendors' systems more complex and expensive to manage.

NetFlex makes NetSuite CRM+ the world's most customizable and extensible application service, delivering unique capabilities not found in any on-demand solution, including:

- Many-to-many data relationships between custom records/objects or even standard objects give you complete flexibility in managing additional mission critical data
- Custom color themes and company logo placement allow NetSuite CRM+ to be stamped with a customer's corporate brand
- Custom terminology helps personalize standard NetSuite CRM+ fields to your business and industry. For example, a service company may want to rename "Customer" to "Client"
- Advanced search capabilities allow for complex AND/OR expressions, criteria nesting, table joins and even result summarization such as Count, Sum, Avg. and Group
- Fields can be placed as footers on list views and when selected, serve to filter the records displayed in the list
- Dynamic sourcing & filtering on custom fields ensure data consistency, ease of entry
- Custom records are automatically built into searching, permissions and Dashboard roles
- Custom code for user defined validations and calculations on forms

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# NetSuite CRM+

## CRM+ Summary:\*

### • Sales Force Automation

- Territory Tracking and Assignment
- Lead Routing
- Opportunity Management
- Commissions Management
- Competitor Tracking
- Quote Generation
- Order Management
- Forecast and Quota Management
- Offline Sales Client

### • Marketing Automation

- Online Lead Forms
- Referral and Promotion Code Tracking
- Automatic Campaign Tracking and Analysis
- Lead Source Management
- E-mail Campaign Management
- Upsell/Cross-sell Wizard

### • Project/Job Tracking

### • Customer Support and Service

- Case Assignment
- Case Capture from Web Site
- Auto-Escalation and Notification
- E-mail Capture and Intelligent Routing
- Case Tracking by Products and Services
- NetAnswers Knowledge Base
- Online Customer Center (Self-Service)
- Time Tracking by Case

### • Partner Relationship Management

- Joint Lead Management
- Joint Sales Forecasting
- Marketing Campaigns
- Order Placement and Tracking
- Volume and Negotiated Pricing
- Promotional Discounts
- Sales and Marketing Library Publishing

### • Website Hosting

- Database Driven Web Site
- Front- and Back-Office Integration
- Affiliate Marketing
- Customer Acquisition
- Customer Self-Service Portals

### • Built-in Web Site Analytics & Reporting

- Shopping Activity Reports
- Customer Specific Site Activity

### • Productivity Tools

- Group Calendaring
- Import and Export of Records
- Outlook and Palm Sync
- Anytime, Anywhere Web Access
- Executive Dashboard and Key Indicators
- Customizable Reporting

\*Some features are sold in add-on modules.

## Customer Relationship Management

With NetSuite CRM+, all your customer touch points—from campaign to contact to contract, from order-to-care—are streamlined within one system. This level of integration allows your marketing team to create and deliver the most effective programs; your sales team to focus on selling; and your service team to offer world-class customer support.

### Campaign to ROI Process Flow

For instance, your marketing group can examine the buying patterns of existing customers who are similar to new leads and, in turn, can design targeted campaign messaging for those leads. Your marketing team will also be able to measure the responses and sales generated from specific campaigns, giving your executives an accurate ROI analysis of marketing programs and expenditures.

### Lead to Order Process Flow

In addition, your sales group can follow up with those customers who are responding to the marketing campaign. Sales people can work with customers closely throughout the sales process: they can track leads as they become opportunities, generate quotes and, finally, convert quotes into sales orders with one click of a button. In addition, sales representatives can view their forecasted commissions for the month, further enticing them to close a sale.

And when a new customer has questions, your service team will have full visibility into which products the customer has ordered, as well as the terms of service. As a result, service representatives can deliver the best possible service to each unique customer.

## SALES FORCE AUTOMATION FEATURE HIGHLIGHTS

### Automated Lead Processing and Territory Management

NetSuite CRM+'s sales force automation (SFA) capabilities allow you to manage your leads and prospects from the first capture to the close of sale. Leads can be captured automatically from your Web site via online forms, imported from purchased lists, or entered manually. New leads can be automatically routed to sales representatives based on territory rules that you define, which means no more lag time in following up with prospective customers. Territories can be based on any criteria, such as geography, product or service area of interest, size of company, or decision timing. As sales people follow up with leads, activity reports provide productivity analysis of all interactions, including phone calls, tasks, meetings, and notes.

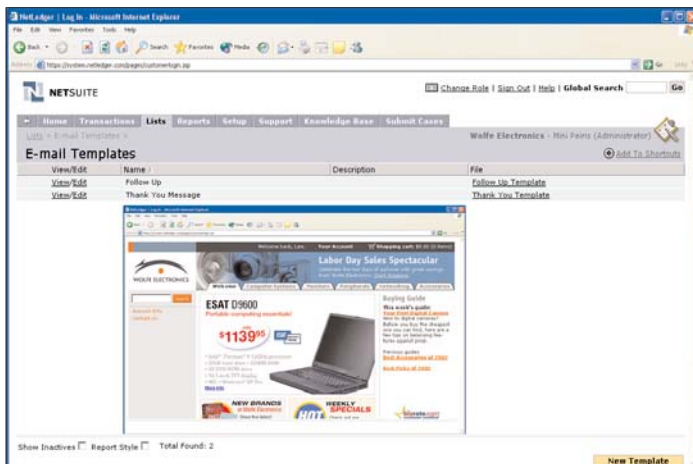


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## Integrated Mail Merge Capabilities and Communication Management

NetSuite CRM+ integrates with Microsoft® Word, allowing you to write letters, print envelopes, and create address labels. Mail merge capabilities also allow you to send e-mail and faxes more easily. You can also use templates that standardize customer communications across your marketing, sales and support organizations. You can run mail merge in batch to a group, an individual company, or a single contact. NetSuite CRM+ records the entire process in historical notes, giving everyone access to reliable, accurate information. In addition, any reply to an e-mail communication sent from NetSuite CRM+ will be automatically recorded, saving your employees considerable time and effort.



E-mail Template

## Opportunity and Pipeline Management

As leads become opportunities, your sales representatives must manage the details of each potential sale while it's still in the pipeline. Armed with information such as key contacts, a record of previous meetings, and which products and services are most suitable for a given customer, sales representatives can determine how likely the deal is to close. They can then assign different priorities to different deals, which facilitate accurate sales forecasting. In addition, customizable status and probability lists allow you to implement sales processes tailored to your business. This level of flexibility, combined with the powerful customization capabilities of NetFlex allow any sales methodology—such as Miller Heiman or Solution Selling—to be implemented more effectively.

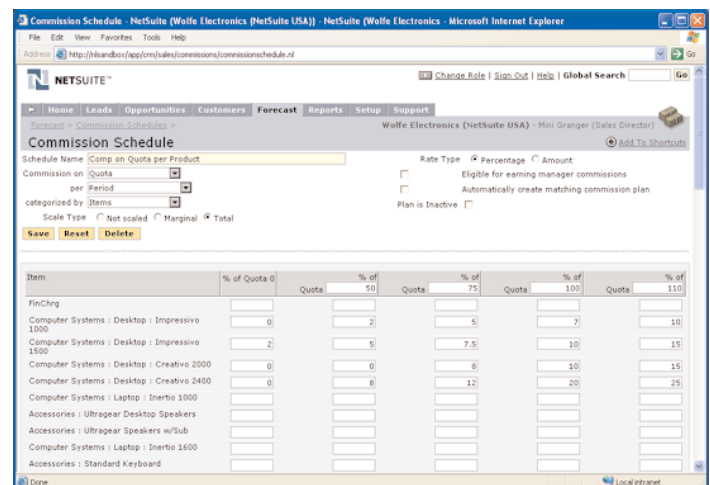
Sales representatives can work with opportunities in a list view, or with a detailed opportunity record. The list view allows for flexible filtering, so individual representatives can analyze the opportunities based on their status, and sales managers can view all the deals their team is assembling. The detailed opportunity record contains all the crucial information sales representatives and managers need: status, potential revenue, key contacts, notes, and related documents. And when a prospect is ready to purchase, your sales people can convert opportunities into quotes, and later, quotes into sales orders—all with a click of a button.

## Order Management

Most CRM solutions let you manage your opportunities. But when it comes time to generate a quote or take the order, many such solutions force you to use a completely disparate order entry, or ERP, system. With NetSuite CRM+, order management is fully automated so that sales representatives can easily access all the discounting and customer-specific pricing rules that typically live in the ERP system. Generating a quote, then converting it to an order, is as easy as clicking one button.

## Incentive Management

With NetSuite CRM+, you have the flexibility to schedule complex commission structures based on how you do business. For example, you can structure commissions based on quantity or sale amount;



Commission Schedule

service item sold; profitability of product sold; percent of quota achieved; or simply, total sales within a given period. Commissions management also gives you the ability to set sliding scales and spiffs across any period such as quarter, six months, or annually. And, if you get mid-way into a month or quarter and discover you need to make

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an adjustment, all you have to do is adjust the effective dates, and compensation will be re-calculated automatically. You can produce and roll up schedules into managerial commission plans for sales executives, allowing for a multi-tiered schedule. In addition, sales representatives can view real-time reports and forecast their commissions on their dashboard, giving them more incentive to close sales faster.

## Standard & Advanced Forecasting

Forecast Master displays all opportunities, quotes, and orders including such key information as the projected amount, probability of close, and weighted amount for each of these transactions. This feature allows sales representatives and managers alike to view their forecasts on a monthly or quarterly basis, and even to make adjustments if needed. Forecast Master also provides sales teams with the means to generate two types of forecasts to represent how the sales team is doing: a calculated forecast based on the sales transactions in the system, and an override forecast, which is the sales amount sales reps' predict for themselves. As a result, you can be certain of an accurate and reliable sales forecast.

The screenshot shows the NetSuite CRM+ Forecasting interface. At the top, there's a navigation bar with 'Home', 'Activities', 'Transactions', 'Lists', 'Reports', 'Documents', 'Setup', and 'Support'. Below that, the 'Forecast' section is active, showing a 'Sales Rep: Krista Barton' and 'Start Date: 6/2/2004' to 'End Date: 6/30/2004'. There are fields for 'Calculated' and 'Override' forecasts, each with 'Worst Case', 'Best Guess', and 'Upside' values. Below this is a table of forecast items.

Forecast Type	Date	Customer	Title	Status	Exp. Close Date	Item Total	Worst Case	Best Guess	Upside
Omitted	6/2/2004	Herron Attorney Inc.	Identified Decision Makers	6/9/2004	4025.00	2000.00	4025.00	4500.00	
Worst Case	6/2/2004	Sandy King	In Discussion	6/9/2004	5360.00	5000.00	5360.00	5500.00	
Best Guess	6/3/2004	All World Produce	Opportunity Identified	6/9/2004	1119.00	1000.00	1119.00	2000.00	

Advanced Forecasting

You can also take advantage of advanced forecasting capabilities. These features extend NetSuite CRM industry leadership in forecasting functionality by being the first to allow businesses to triangulate their forecast using three key metrics:

1. A "calculated forecast" that uses a rep's actual opportunities and quotes as the basis for the calculation. Using actual quotes and estimates to derive the forecast gives managers and reps better visibility into the exact dollar value and probability of a deal closing.
2. A "mood ring" forecast that allows reps to submit what they "believe" they will sell, without tying the forecast to specific opportunities. This mood ring forecast applies to each management level, allowing sales managers to override the forecast as entered by the rep based on their knowledge of the reps forecasting habits.

3. Actual sales within the forecast to give a much clearer picture of what portion of the forecast is yet to close. In addition, recurring revenue is included in forecast actuals giving a complete picture of a given period's sales projection.

All three forecast projections are presented in a single dashboard view called the Sales Management portlet. The Sales Management portlet delivers the calculated, best guess override and actual projections in a hierarchical view of the sales organization that can be expanded to show details down to individual reps or can be rolled up for summary views of each sales team, by manager.

## Quota Management

Quota Management features allow sales managers to set goals for sales representatives. When coupled with the forecasting capabilities, these tools help sales representatives compare their performance levels to set goals. Furthermore, quotas can be assigned based on the sales representative or the type of sale. For instance, you could assign an overall departmental quota to inside sales, outside sales, and channel sales. Or, you could assign quotas based on new business versus repeat business.

## Offline Sales Client

Can't find an internet connection while traveling? With the Offline Client in NetSuite CRM+, sales reps can still stay productive, performing your normal pre-call and post-call follow up activities and then synchronizing those changes once you get back to the hotel or office.

Users can access and update their leads, prospects, customers, and contacts and can create new ones. Opportunity management is available within the Offline Client, allowing sales users to edit the details of an opportunity such as status, probability, projected amount, expected close, and detail notes. You can view estimates (quotes), and closed transactions (orders, invoices) within tabs on the main opportunity record. The Offline Client includes a complete graphical calendar and Activities Dashboard, including task and phone call lists, quick add portlets, and search support. You can create new, edit existing and delete phone calls, tasks, and events just as with the online version.

In addition, version updates are handled seamlessly via synchronization. When the online application has a new version, the offline user will be prompted at time of synchronization to upgrade their offline client, so there's no messy database recreation or CDs to ship out as with many Windows-based offline or remote access systems.

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## MARKETING AUTOMATION FEATURE HIGHLIGHTS

### Lead Management and Lead Source Analysis

NetSuite CRM+ has multiple avenues for lead entry, including online forms that allow you to capture leads directly from your Web site; CSV and XML import capabilities with duplicate detection for inputting purchased lists; and manual entry by sales representatives for cold calling and referrals. You can use the easy click-to-customize capabilities of NetSuite CRM+ to tailor your lead qualification and scoring methods to your business. Plus, the source of each lead can be tracked both at the lead and opportunity level. Lead management capabilities, combined with the integration of customer purchases, allow you to analyze all your marketing efforts for lead conversion rates and ROI assessment.

### Marketing Campaign Management

NetSuite CRM+ fully automates, tracks, and reports on your marketing efforts. Marketing campaigns, such as e-mail, direct mail, or print activity can be managed, tracked, and analyzed centrally. Once a campaign has been executed, NetSuite CRM+ tracks ROI from start to the finish of a program, providing accurate and up-to-the-minute success metrics. Moreover, you can easily set up and manage multi-channel campaigns, or track the cost and expected revenue per campaign.

### Campaign Offer List

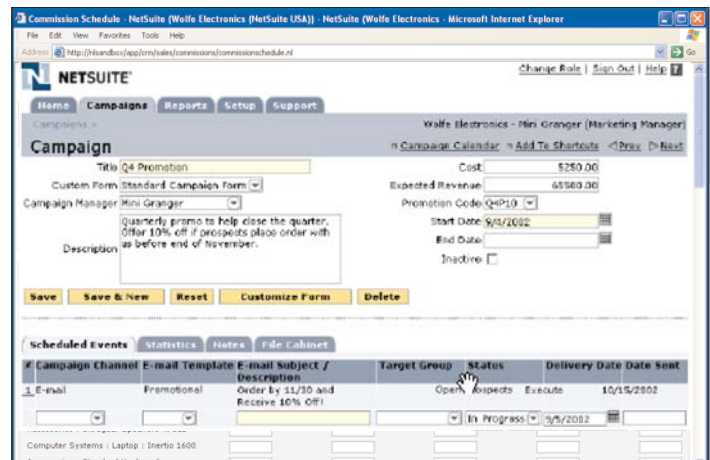
A customizable offer list enables users to track the offer tied to a campaign event. Users can set up the offers they are promoting through campaigns with the campaign offer list and select the appropriate offer when they create the campaign event. To track the effectiveness of particular offers, users can simply customize the marketing reports to filter campaign events to specific offers, such as newsletters, item promotion, etc. The offer list provides marketing users with additional information to monitor and track marketing campaign events.

### Promotion and Discount Tracking

To further strengthen your campaigns, you can design promotional discounts and track them via promotional codes. These promotions can be set up in any number of ways: as one-time use, percent-based, dollar discount, or with a set expiration date. You can drive recipients of the campaign to an online form, your Web store, or your call center. No matter how customers respond, the promotional code can be used in the sales transaction, giving them the discounted price and allowing you to track ROI for that campaign.

### E-mail Marketing

NetSuite CRM+ provides complete e-mail campaign management, from target segment creation to creative development and campaign execution and analysis. You can personalize e-mail templates with customer names or targeted product offerings. Target segments can be created based on actual customer purchase activity, giving you a platform for true one-to-one marketing. And your e-mail campaigns can be linked with online capture forms, further automating your marketing efforts. Throughout a campaign, NetSuite CRM+ tracks ROI metrics, providing accurate and up-to-the-minute data so you know exactly who received, read, and purchased products during a given e-mail campaign.



Campaign

### Upsell/Cross-sell

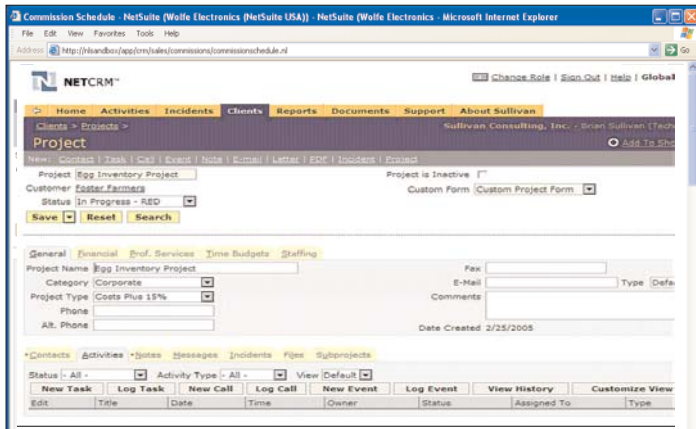
Rich purchase history driven by past orders can be mined easily using flexible point and click query tools. Other lead, prospect and customer profile data can be mixed with the purchase history criteria to further segment target groups, allowing very specific messaging to be used to maximize the reach of multi-channel campaigns.

### Project/Job Tracking

NetSuite CRM+ lets you manage multiple types of projects including time and materials, fixed price, and cost plus projects. You can create project jobs and link them to specific customers. You can even create sub-jobs. All project job records include start dates, estimated end dates, percentage of work completed, actual end dates, as well as all income and expenses associated with each project. NetSuite CRM+

# NetSuite CRM+

also organizes your tasks, calls and events, linking them to specific projects. Best of all, information regarding your clients is managed in one place so your resource tracking is complete and real-time for ever-improving client service and can be segmented and leveraged for smarter client intelligence.



Project/Job Tracking

## CUSTOMER SUPPORT MANAGEMENT FEATURE HIGHLIGHTS

### Case Management and Routing

NetSuite CRM+ provides you with the ability to create, escalate, manage, and resolve customer support cases across your communication channels, including phone, fax, and Web. Your customer support representatives view the entire customer record, including sales, service, and inquiry histories. In addition, customer support managers can define automatic case-assignment rules based on any case criteria. For example, cases can be routed based on product, issue, case type, partner, or customer, so that handling queues or customer priorities is easy and efficient.

### Case Escalation Business Rules

Almost all support and service organizations have defined escalation processes to be followed to meet the contracted service levels for customer support and service. Case escalation rules provide the ability to automate these real-world processes. Rules can be set up to escalate all or specific types of cases if they are not resolved within defined

time periods, and multiple escalation levels can be defined. Interested parties such as managers, account managers, or others can also be notified at pre-defined escalation points so they are in the loop on potential issues and can take appropriate action. Escalation rules can

be set to trigger when certain conditions occur and can be rolled up to form an escalation territory, creating complex tiered escalation patterns. The escalation path can be defined: who needs to be notified and when, also taking into account preferred methods of escalation notifications. Users also now have visibility to escalated cases in new reports and new Key Performance Indicators (KPIs) so analyzing the performance of your customer support and service groups is as simple as a few clicks on your real-time dashboard.

### NetAnswers Knowledge Base

The NetAnswers Knowledge Base organizes information into different levels of topics and solutions. NetAnswers is perfect for organizing your frequently asked questions and answers, standard problems and resolutions, and known issues or special tips. NetAnswers allows support representatives to resolve customer inquiries via e-mail or phone more quickly, thereby reducing the learning curve when bringing on new service representatives. In addition, you can publish either portions of this database, or all of NetAnswers, to your customers and partners, giving them a 24/7 self-service option at a much lower cost than staffing your phone lines.

### Online Case Capture Forms and Self-Service

You can use case capture forms anywhere on your Web site, including the online Customer Center. Case capture forms allow your customers to enter trouble tickets by logging onto your site, rather than calling or e-mailing you. In addition, the Customer Center provides a password-protected area where your customers have several other self-service options. For instance, they can access the knowledge base you've published, track the shipping status of their orders, place new orders, or enter requests for merchandise return. They can also update their customer profile and view their billing history, taking advantage of a cost-effective service option that is available around the clock.



Online Customer Form

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## E-mail Case Capture and Intelligent Routing

NetSuite CRM+ provides unprecedented ease of use in reporting issues to customer support/service or even being able to contact other departments. You can have a case created by simply sending an e-mail to a designated e-mail address—this way your customers do not need to waste precious time waiting to talk to a representative or even logging into the Customer Center to create a case online. The e-mail is analyzed and a case created on behalf of the customer. An automatic reply can be triggered confirming receipt of the e-mail and the case number for the case created. This simplifies and streamlines the process of case creation. It also aids in handling requests for product or price information, follow-up sales calls, or any such requests by routing the case based on the address the e-mail was originally sent to such as support@yourcompany.com, info@yourcompany.com, billing@yourcompany.com or other distinct e-mail addresses. E-mail case capture reduces phone wait times for your customers to talk to the right people and offers yet another low-cost option for submitting requests.

## Support, Service, and Time Tracking

If you need to charge for technical support on a per-minute basis, or track the time your service professionals spend with a given client, NetSuite CRM+'s time tracking capabilities will provide you with a new level of efficiency. Time tracking features let you record the time spent on cases, tasks, and events. Or, if you simply want to track time your team spends per case, NetSuite CRM+ lets you track and approve time without billing it to the customer.

## PARTNER RELATIONSHIP MANAGEMENT FEATURE HIGHLIGHTS

### Joint Lead and Opportunity Management

Advanced Partner Center comes complete with all the lead distribution and opportunity management tools you need to gain complete visibility into your sales pipeline—even when that pipeline includes revenue projections from selling partners. You can stay abreast of your resellers' lead process by having them register their leads, as well as inputting next steps they've taken with leads you've already distributed to them.

### Promotional Discounts and Marketing Campaigns

Advanced Partner Center allows you to extend promotional discounts to your partners as one-time-use discounts, or on all sales within a particular time period. You can help your partners improve their campaign response rates, as well as your return on co-marketing dollars, by leveraging the Advanced Partner Center.

## Sharing Customer Management and Service Access

Advanced Partner Center provides a smooth flow of information, allowing your partners to view and update joint customer profiles. It also lets them track support or service cases. You can even allow them to log a case on behalf of the customer, or check the status of existing cases, so that cases are always up to date.

## Sharing Sales and Product Information Advanced Partner Center

This center enables you to publish sales information such as marketing collateral, competitive selling guides, presentations, product fact sheets, and other sales tools. You can also share your knowledge base with partners, including frequently asked questions, the latest workarounds, and details on resolved issues.

## WEB SITE HOSTING, ANALYTICS FEATURES

### Site-Building Tools


With NetSuite, you can set your Web site apart with online site-building tools that allow you to choose from a variety of layout styles and designs. You can upload your own HTML files to create a unique Web site look, and can customize site elements such as headers, footers, tab bars, sidebars and content wrappers. You can even display different looks and site elements on each tab. No HTML expertise is required to set up or manage your NetSuite Web site. Forms are easily set up to capture leads or gather inquiries.

### Hosting and Publishing Capabilities

With NetSuite you can host an entire HTML Web site. By using smart tags, you can convert static sites into dynamic pages, pulling any key business data from the database. Publish unique content to your site, including documents, catalog items, or employee directories. A comprehensive permissions system allows you to publish to an individual, department, or group. NetSuite flexibility allows you to create hybrid sites that use static HTML and dynamically created pages like product catalogs and checkout areas.

### Customer Portal

Customer self-service provides real-time, cross-channel views of all interactions for delivery of superior customer service—whether the interaction occurred on the Web just seconds ago or with a sales rep in person yesterday. In addition, customers can view outstanding quotes or orders and even request returns. Most importantly, detailed order history allows an easy check of entitlement to service levels as well as intelligent up-sell/cross-sell offers, helping turn the call center into a profit center.

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## Online Support

NetSuite enables you to add another dimension to your customer support efforts. By publishing the NetAnswers Knowledge Base and customer case forms, your customers are able to respond with questions or issues, 24/7. All case forms can be routed to the appropriate representative depending on the topic of the issue. In this way, you are able to quickly handle customer issues and increase customer satisfaction and loyalty.

## Web Analytics

NetSuite's single system integrates all business functions to provide the most actionable and insightful net analytics software available. The unique benefit of NetSuite's new analytic features is that they tie traditional Web metrics with transaction data and specific customer activity data. Thus the reports tell you not only how your customers found you, but also measure the ROI of your referrers and search engine keywords. The reports tell you not only which pages are most frequently visited, but exactly which customers visited them and when these visits took place. And unique to NetSuite, you can drill down to individual customers and review all of their activities on your site, including their shopping cart content, their pages viewed, their referring URL and keyword, their click-stream paths, and much more.

## REPORTS INCLUDE:

### Referrer Report

Referrer reports tell you where your visitors are coming from. It records the referring URL from which your visitor originally navigated. This tells you where your traffic is coming from.

### Search Engine Keyword Report

Search Engine Keyword reports track the search terms your visitors used to find you. For instance, if your visitor looked for you on Google using the search term "Racing Bikes," and then linked from Google to your Web site, NetSuite records both the referring URL (Google) and the search keywords (Racing Bikes).

Keywords	Last Visit	Number of Visitors	Number of Customers	Total Revenue	Revenue/Visitor	Revenue/Customer
Cable	8/14/2004	3	3	\$0.00	0	0
Computer	8/7/2004	2	2	\$0.00	0	0
Keyboard	8/24/2004	6	6	\$0.00	0	0
Speakers	8/22/2004	3	3	\$0.00	0	0
<b>Total</b>		<b>14</b>	<b>14</b>	<b>\$0.00</b>	<b>0</b>	<b>0</b>

Search Engine Keyword Report

## Customer Activity Reports

Now you can have a complete understanding of your visitor's Web activities. Each customer record details how the customer found your site (referrer and search engine keyword), what pages they have visited, which click-paths they navigated, how many times they have visited, when their visits took place, and what page they are currently viewing. You can also see exactly what is in their shopping cart, giving your sales force assistance in closing the sale, and your marketing team valuable segmentation information.

Keywords	Last Visit	Number of Visitors	Number of Customers	Total Revenue	Revenue/Visitor	Revenue/Customer
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Speakers	8/22/2004	3	3	\$0.00	0	0
<b>Total</b>		<b>14</b>	<b>14</b>	<b>\$0.00</b>	<b>0</b>	<b>0</b>

Customer Activity Reports

## Visitor Detail Reports

Visitor detail reports allow you to see exactly which visitors performed the activity you are measuring. For instance, you can see exactly which visitors clicked on each page, came from each referrer, or searched by each keyword.

# NetSuite CRM+

## **New and Unique Visitor Reports**

Enhance your visitor and page view analysis with reports that distinguish first-time visitors from return visitors, and provide separate information for each. Not only can you see if it is the visitor's first visit during a time frame, but also if it is their first visit overall. This provides much more robust visitor information. You can place the two visitor metrics directly onto your dashboard as a KPI.

## **Web Report Snapshots and KPIs**

You can now display a whole set of Web metrics on your dashboard in the form of reports and KPIs. Among the new Web report snapshots are Referrer, Keyword, and page views. The Referrer and Keyword report snapshots let you view the top Referrers/Keywords by either number of visitors or by revenue generated.

## **PRODUCTIVITY TOOLS FEATURE HIGHLIGHTS**

### **Outlook/Palm Sync**

NetSuite CRM+ easily syncs with Microsoft Outlook, any Palm handheld device or Blackberry device, so you can keep your business contacts, tasks, and calendar information updated across various platforms.

### **Import and Export of Data**

NetSuite CRM+ allows you to import and export list records and transactions using CSV imports, or our Small to Medium Business Extensible Mark-Up Language (smbXML), allowing you to use external applications more easily and to get started with your implementation process more quickly.