NETSUITE

ONE SYSTEM. NO LIMITS.

NetSuite *Offline Client for Sales*

NetSuite Offline Client for Sales includes:

- Leads
- Prospects
- Opportunities
- Customers
- Contacts
- Phone Calls
- Tasks
- Meeting Events
- Graphical Calendar
- Synchronization
- Field Level Conflict Resolution
- Automatic Version Updates

NetSuite's Offline Client for Sales gives sales reps tools they need to be productive while working offline. With NetSuite, sales reps can perform normal pre-call and post-call follow-up activities while disconnected, and then synchronize when next online.

Why NetSuite Offline Client?

Lead, Account & Contact Management

Sales users can access and update their leads, prospects, customers & contacts in addition to creating new ones. Information associated with these records such as cases, campaigns, files, items purchased and messages are available for viewing within tabs on the main record. For associated activities such as tasks, phone calls and events, you can drill-down into the detailed record or create new associated activities. Notes offer the same flexibility as activities, as do opportunities. Other transactions such as quotes, orders and invoices are visible as associated records on a tab; however, they do not offer drill-down into details.

Pipeline Management & Forecasting

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. Products and services (items) already associated with an opportunity are available for viewing but do not allow editing, adding or deleting of items on the opportunity.

One-click order management and quote capabilities found in the online version are not available in the Offline Client. However, you can view estimates (quotes), and closed transactions (orders, invoices) within tabs on the main opportunity record. Drill-down on these records is not offered. Messages and files associated with the opportunity have the same capabilities. For activities associated with the opportunity such as tasks, phone calls and events, you can drill-down into the detailed record or create new associated activities. Notes offer the same flexibility as activities.

Managing Your Day

The Offline Client includes a complete graphical calendar and Activities Dashboard including task & 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. Recurring calendar events are supported; however, availability information for other attendees or resources is not visible offline.

Synchronization & Automatic Version Updates

Sales users can select a limited number of their lead, prospect, customer accounts or opportunities and contacts to take with them offline. Selection of the offline content can be done at the account or opportunity level using common pre-defined rules or by marking individual records for use offline. The pre-defined rules cover scenarios such as

NETSUITE
ONE SYSTEM. NO LIMITS.

"My Accounts", "My Team's Accounts", "Open Opportunities to Close This Month", "Personal Contacts" etc.

After the initial synchronization, subsequent sync sessions only sync the changes rather than the full record set, minimizing the sync time. Data change conflict resolution is handled at the field level, greatly reducing the occurrence of conflicting data changes. If a conflict is detected you are asked to select which change wins during synchronization.

Version updates are also handled seamlessly via synchronization. When the online application has a new version, the offline user will be prompted at the time of synchronization to upgrade their offline client. This upgrade process occurs over a standard internet connection and doesn't require installation CD's or re-creation of offline (remote) databases.