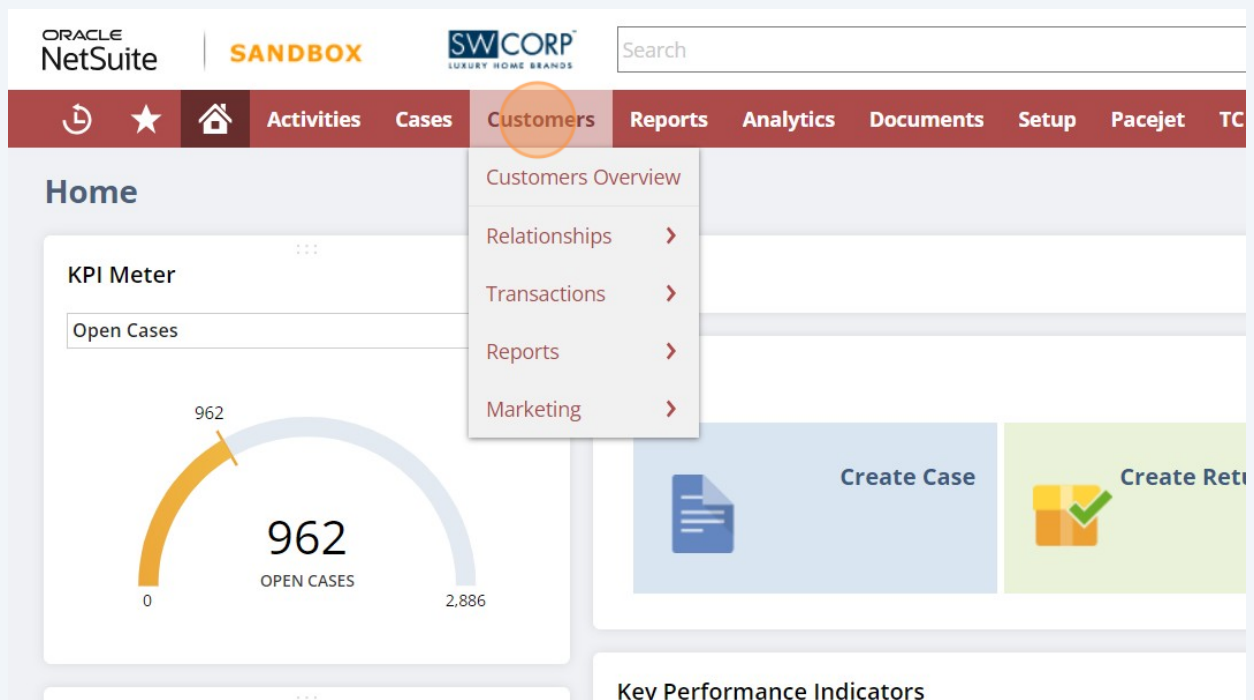


Create a Opportunity in NetSuite

1 Go to Netsuite

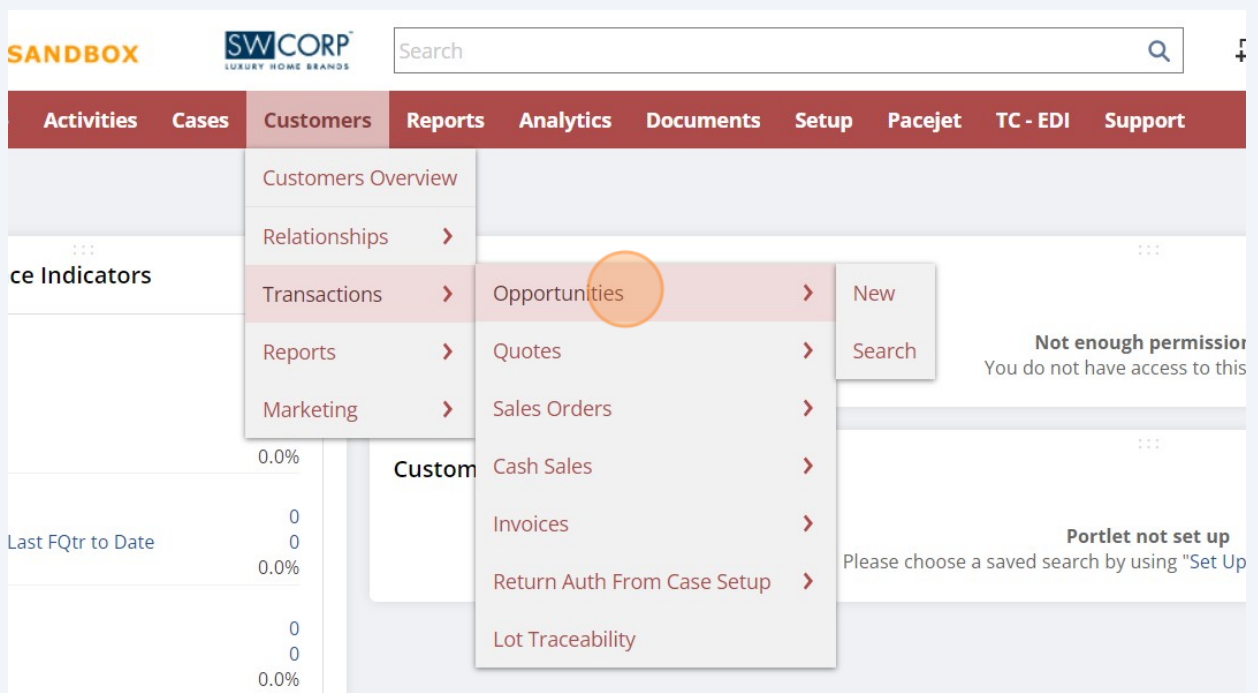
2 Go to "Customers"



3 Hover over Transactions



4 Hover over "Opportunities"



5 Click "New"

The screenshot shows the NetSuite interface with the 'Customers' menu open. The 'New Opportunity' button is highlighted in blue. A red circle highlights the 'New' button in the 'Opportunities' sub-menu.

SALES REP	DATE	EXPECTED CLOSE	OPPORTUNITY STATUS
	7/26/2019	7/26/2019	Closed Lost
Antavia I Bellamy	8/6/2019	8/6/2019	Closed Lost
Antavia I Bellamy	8/14/2019	8/14/2019	Closed Lost
Antavia I Bellamy	8/16/2019	8/16/2019	Closed Lost
Antavia I Bellamy	8/23/2019	8/23/2019	Closed Lost
Antavia I Bellamy	8/23/2019	8/23/2019	Closed Lost

6 Go to "Company" and enter the company and/or customer's

The screenshot shows the NetSuite 'Opportunity' form. The 'Company' field is highlighted with a red circle. The form includes fields for 'Opportunity #', 'Title', 'Sales Rep', 'Probability', 'Projected Total', 'Win/Loss Reason', and 'Weighted Total'.

Primary Information

OPPORTUNITY #
To Be Generated

COMPANY *
[Redacted] ▼ + [Link Icon]

SUBSIDIARY
Spa World Corporation

Forecasting

PROBABILITY *
20.0%

WIN/LOSS REASON
[Redacted] ▼

TITLE
[Redacted]

SALES REP
[Redacted] ▼

PROJECTED TOTAL *
0.00

WEIGHTED TOTAL
0.00

7

Select your name from the "Sales Rep" drop down

Customers Reports Analytics Documents Setup Pacejet TC - EDI Support

TITLE

PARTNER

SALES REP

FORM *
Spa World - Opportunity Form

EXPECTED CLOSE *
2/19/2024

STATUS *
In Discussion

Aimee Sullivan
Bobby Miller
Brittany Chesler
Danny Cruz
Daphness Fils-Aimee
Emmanuel Duarte

8

Go to the Title field and enter the customer's name and phone number

SANDBOX SWCORP LUXURY HOME BRANDS Search

Activities Cases Customers Reports Analytics Documents Setup Pacejet TC - EDI Support

unity

ancel Actions

TITLE

SALES REP
Daphness Fils-Aimee

PROJECTED TOTAL *
450.00

WEIGHTED TOTAL
90.00

9 Go down to the "Item" field and input SKU/s and pricing

LEAD SOURCE

CAMPAIGN CATEGORY

LAST SALES ACTIVITY

Items Relationships Communication Address Sales Accounting System Information Pacejet eBay

CURRENCY *

EXCHANGE RATE *

ITEM *	QUANTITY	UNITS	DESCRIPTION	PRICE LEVEL
<input type="text"/>				

CAMPAIGN CATEGORY

PROJECT

LAST SALES ACTIVITY

Items Sales Accounting System Information Pacejet eBay

EXCHANGE RATE *

	PRICE LEVEL	RATE	AMOUNT	DIVISION	CLASS	EXPECTED SHIP DATE	CONFIGURATOR DATA	SCPC LINE
✓	Custom		450.00		PARTS : Shower Door			

10 Click "Add"

LEAD SOURCE

CAMPAIGN CATEGORY

LAST SALES ACTIVITY

Items Relationships Communication Address Sales Accounting System Information Pacejet eBay

CURRENCY *

EXCHANGE RATE *

ITEM *	QUANTITY	UNITS	DESCRIPTION	PRICE LEVEL
SD-AS055-01CH-HW	1	EA	SD-AS055-01CH-HW	Custom

<Type then tab>

11 Enter Probability to close the quote

Primary Information

OPPORTUNITY #
To Be Generated

COMPANY *

SUBSIDIARY
Spa World Corporation

TITLE

SALES REP
Daphness Fils-Aimee

Forecasting

PROBABILITY *

PROJECTED TOTAL *

WIN/LOSS REASON

WEIGHTED TOTAL

Classification

LEAD SOURCE

CAMPAIGN CATEGORY

LAST SALES ACTIVITY

Items Relationships Communication Address Sales Accounting System Information Pacejet eBay

12 Click Save

Items Relationships Communication Address Sales Accounting System Information Pacejet eBay

CURRENCY ^{*}
US Dollar

EXCHANGE RATE ^{*}
1.00

Add Multiple Intelligent Recommendations ⁰ Update Projected Clear All Lines ☒ Configure

ITEM [*]	QUANTITY	UNITS	DESCRIPTION	PRICE LEVEL
SD-AS055-01CH-HW	1	EA	SD-AS055-01CH-HW	Custom

<Type then tab>

Actions