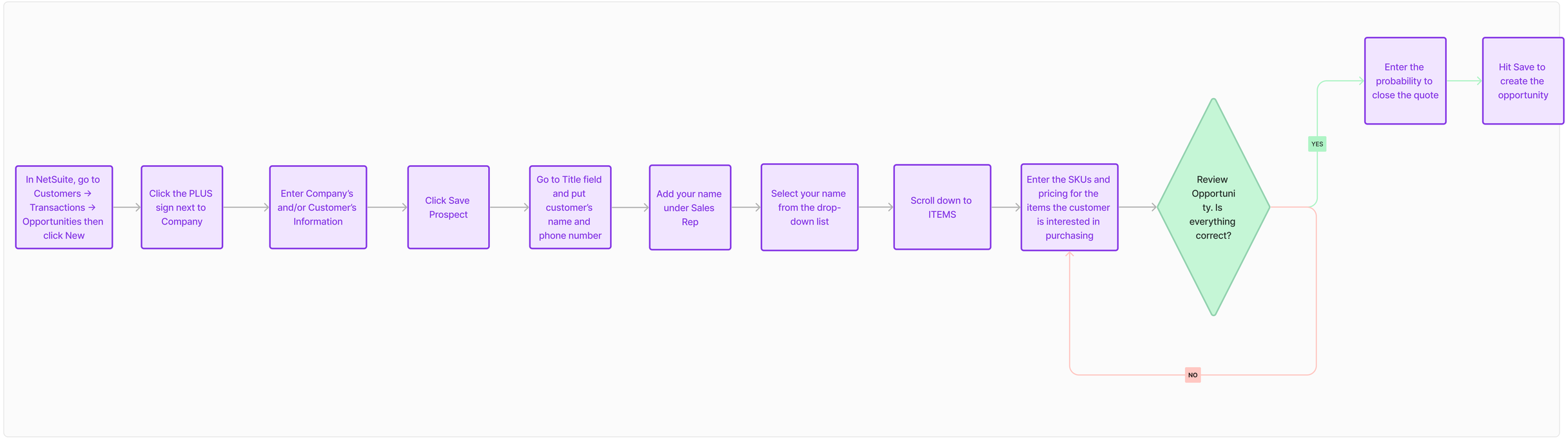
Flow chart


In NetSuite, go to Customers → Transactions → Opportunities then click New
Click the PLUS sign next to Company
Enter Company's and/or Customer's Information
Click Save Prospect
Go to Title field and put customer's name and phone number
Add your name under Sales Rep
Select your name from the drop-down list
Scroll down to ITEMS
Enter the SKUs and pricing for the items the customer is interested in purchasing
Review Opportunity. Is everything correct?
YES
Enter the probability to close the quote
Hit Save to create the opportunity
NO