



NETSUITE CRM

EXTENDED PROFILE

ORACLE NETSUITE

OVERVIEW

NetSuite CRM is a cloud-based solution suitable for organizations of all sizes, although medium to large sized sales teams will likely to benefit particularly from the management, compensation, and KPI features.

NetSuite software incorporates traditional CRM features such as SFA and marketing automation with sales performance, order management, and e-commerce capabilities. It aims to give users a '360-degree view' of their customers so that sales teams can close more deals and provide better service, hence a strong focus on analytics. A flexible compensation calculation engine comes as standard, as do automated reporting tools.

A key feature of the NetSuite CRM package is its advanced sales forecasting and quota management tool. Probability-based forecasting coupled with an order management tool allows users to evaluate opportunities and pending orders automatically or in real-time. The marketing suite includes email automation, lead capture and interactive reports that allow users to drill down on individual aspects of a campaign.

NetSuite CRM integrates the NetSuite e-commerce package as well as third party software such as Microsoft Outlook and Google Apps. The platform is accessible via any internet browser or iOS and Android mobile apps. There is also a developer platform that allows clients to customize and expand the Netsuite package. Pricing is based on a base license fee with a per-user, per month model thereafter.

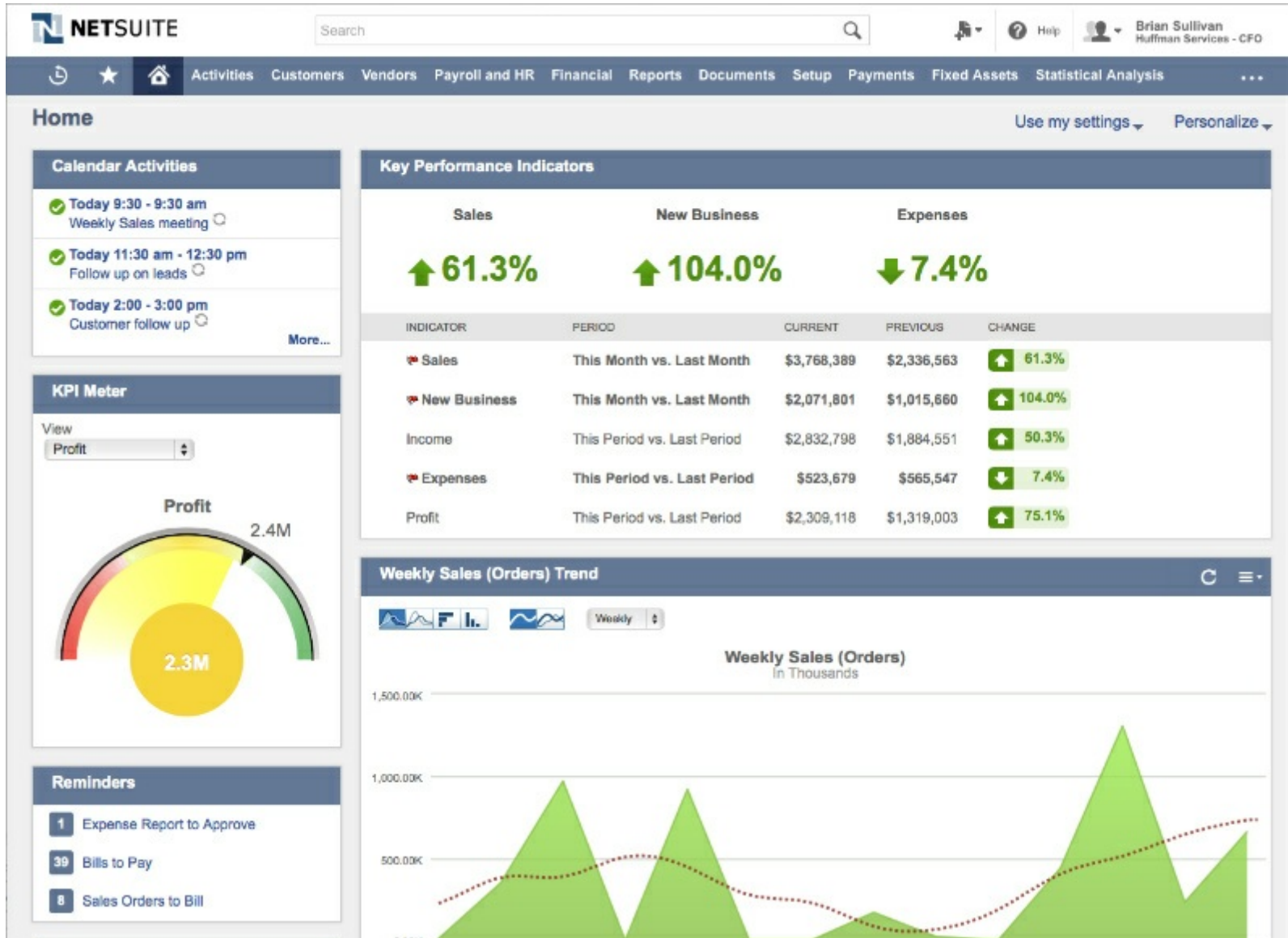
ORACLE NETSUITE

SOFTWARE SPECIFICATION

| OVERVIEW | |
|-------------------------|--------------|
| PRODUCT NAME | NetSuite CRM |
| SOFTWARE FEATURES | |
| API ACCESS | ✗ |
| CADENCE | ✓ |
| CONTACT MANAGEMENT | ✓ |
| CONTRACT MANAGEMENT | ✗ |
| DATABASE MANAGEMENT | ✓ |
| FUNNEL REPORTING | ✓ |
| INTEGRATIONS | ✓ |
| PARTNER TRACKING | ✓ |
| PERFORMANCE REPORTING | ✓ |
| PIPELINE MANAGEMENT | ✗ |
| PRODUCT & PRICE CONTROL | ✓ |
| SALES GAMIFICATION | ✓ |
| QUOTATION HANDLING | ✓ |

| | |
|--------------------------------|---|
| TASK ASSIGNMENT | ✗ |
| TERRITORY/QUOTA MANAGEMENT | ✓ |
| SUPPLEMENTARY FEATURES | |
| CPQ | ✗ |
| CUSTOMER SERVICE AUTOMATION | ✓ |
| MARKETING AUTOMATION | ✓ |
| SOCIAL RELATIONSHIP MANAGEMENT | ✓ |
| CUSTOMER SIZE | |
| SMALL (1-50 USERS) | ✓ |
| MEDIUM (51-200 USERS) | ✓ |
| ENTERPRISE (201+ USERS) | ✓ |
| OTHER FEATURES | |
| MULTIPLE LOCATIONS | ✓ |
| MULTIPLE CURRENCY | ✓ |
| CUSTOMIZABLE | ✓ |
| MOBILE FEATURES | |
| IOS APP | ✓ |
| ANDROID APP | ✓ |
| NATIVE WEB APP | ✓ |
| HOSTING METHOD | |

| | |
|-------------------------------------|----------------------|
| CLOUD | ✓ |
| ON-PREMISE | ✗ |
| FURTHER INFORMATION | |
| PRICING | No Pricing Available |



Settings

17. Feb 3. Mar 17. Mar 31. Mar 14. Apr 28. Apr 12. May

NETSUITE | Home | Activities | Software Edition | Leads | Opportunities | Customers | Forecast | Reports | Documents | Setup | Renewals | Support | Sales Tools | Forms and Features

Key Performance Indicators

- My Team's New Leads: 165 (This Month vs Last Month: +32.8%)
- My Team's Sales (Orders Arr. GAAP): \$162,025 (This Month vs Last Month: +44.2%)
- My Team's Sales (Billings): \$4,542,813 (This Month vs Last Month: +20.2%)
- My Team's Forecast (Arr. GAAP): \$1,048,519 (This Month vs Last Month: +20.2%)
- My Team's Forecast (Billings): \$11,210,510 (This Month vs Last Month: +20.2%)
- My Team's Quota (Billings): \$2,000,000 (This Month vs Last Month: +20.2%)
- My Team's Pipeline (Arr. GAAP Projected): \$900,000 (This Month vs Last Month: +20.2%)
- Approval Commission: \$50,664 (This Month vs Last Month: +20.2%)

Sales/Opportunity Metrics

| Metric | Trend | This Month | Last Month | This Quarter | This Year |
|------------------------|-------|-------------|-------------|--------------|---------------|
| Opportunities Won | ↓ | 34 | 4 | 26 | 31 |
| New Opportunities | ↓ | 34 | 3 | 37 | 38 |
| Pipeline from New Opps | ↓ | \$2,197,514 | \$1,629,500 | \$11,248,554 | \$11,585,104 |
| Sales/Rep | ↓ | 456,281.34 | 177,893.03 | 684,258.6 | \$1,431,914.4 |

Sales Managers by Forecast (Date Range: This Month)

| Sales Rep | Quota | Quota (Arr. GAAP) | Calculated | Calculated (Arr. GAAP) | Override | Override (Arr. GAAP) | Actual | Actual (Arr. GAAP) |
|----------------|--------------------|--------------------|---------------------|------------------------|--------------------|----------------------|--------------------|--------------------|
| No Sales Rep | | | \$0 | \$0 | | | \$0 | \$0 |
| Brian Sullivan | \$2,000,000 | \$1,000,000 | \$11,210,510 | \$1,000,519 | \$2,750,000 | \$521,520 | \$4,952,013 | \$553,620 |
| Total | \$3,642,594 | \$2,649,599 | \$11,278,519 | \$1,998,519 | \$3,944,156 | 978,834 | \$4,622,913 | \$553,620 |

Competitor Opportunities - 198K to Close This Month

| New | EBL View | Customer | Excluded Close | Sales Rep | Forecast Total | Competitor |
|-----|----------|---------------------|----------------|----------------|----------------|------------------------------|
| N* | EBL View | James Manufacturing | 12/1/2009 | Main Concannon | 100000 | OB/Williams & Avery Software |
| N* | EBL View | Alma Technology | 12/1/2009 | Brian Sullivan | 224555 | OB/Williams & Avery Software |
| N* | EBL View | Business Jet | 12/21/2009 | Brian Sullivan | 224555 | OB/Williams & Avery Software |

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Key Performance Indicators

- My Team's Open Cases: 10 (This Month vs Last Month: +25.0%)
- My Team's Cases Closed: 2 (This Month vs Last Month: -50.0%)
- My Team's Cases Closed: 1 (This Month vs Last Month: -50.0%)
- My Team's Cases Closed: 8 (This Month vs Last Month: +25.0%)

High Priority Cases

| Case ID | Case Name | Incident Date | Assigned To | Status | Support Level |
|---------|-----------|---------------------|----------------|-----------|---------------|
| N* 101 | Case 101 | 12/20/2013 10:05 am | Brian Sullivan | Escalated | Gold |
| N* 102 | Case 102 | 12/17/2013 10:05 am | Brian Sullivan | Escalated | Gold |
| N* 103 | Case 103 | 12/16/2013 11:03 am | Brian Sullivan | Escalated | New |
| N* 104 | Case 104 | 12/16/2013 11:03 am | Brian Sullivan | Escalated | Platinum |

Weekly Open Cases Trend

NETSUITE | Home | Activities | Leads | Opportunities | Customers | Forecast | Reports | Documents | Setup | Support

Key Performance Indicators

- My Team's Sales: 32.8% (This Month vs. Last Month: +32.8%)
- My Team's Quota: 11.7% (This Month vs. Last Month: +11.7%)
- My Team's Opportunities: 35.3% (This Month vs. Last Month: -35.3%)
- My Team's New Leads: 204.2% (This Month vs. Last Month: +204.2%)

Weekly Total Pipeline Deals

Forecast vs Quota

Sales & Operations

- Sales:** Customer LTV, Customer Profitability, Sales by Category, Sales by Product, Sales by Region, Margin Analysis
- Sales Forecast:** Forecast by Item, Forecast by Date, Forecast Accuracy, Forecast by Product, Forecast by Region, Forecast by Sales
- Operations:** Customer LTV, Customer Profitability, Sales by Category, Sales by Product, Sales by Region, Margin Analysis
- Commission:** Paid Commission, Commission Overview, Commission Tracking, Commission Reports

Sales Manager by Forecast (Date Range: This Month)

NETSUITE | Customers | Customer | Bay Media Research

KPIs

- My Sales: 18.9%
- My Quota: 3.5%
- My Estimate: 20.2%

KPI Meter (12)

SAVED SEARCHES

- My Active Prospects
- My Estimates

Customer Summary

Customer ID: Bay Media Research
 Status: CUSTOMER-Closed Won
 Sales Rep: Baruch Rollins
 Web: maryc@baymedia.com
 Address: 831.777.1212
 Address: Bay Media Research, 123 Maint St, Redwood CT 06691

CONTACTS (1)

Mary Contreau, 831 777-1212, maryc@baymedia.com

My Calendar

Today: 12/15/2013 - 18/5/2013

- 10:15 am @14,225 9530
- 10:30 am demo CRM+
- 12:00 pm Lunch with Natasha
- 1:00 pm eCommerce demo
- 3:30 pm Complete
- 4:30 pm
- 6:00 pm Eventing catchup with Kate
- 7:00 pm Various