Bundles of Joy

Dana Larson
drlarson@eidebailly.com
303.459.6757

EideBailly®

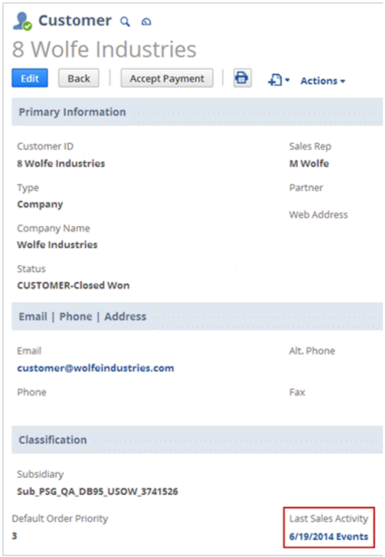
CPAs & BUSINESS ADVISORS

Free!!

- Last Sales Activity
- Subsidiary Navigator
- Nerdly Multi Company Automation

Last Sales Activity

The Last Sales Activity (LSA) SuiteApp adds a **Last Sales Activity** field on lead, prospect, customer, contact, and opportunity records. The field displays the date a sales activity was last performed for that record. Click the Last Sales Activity link in the **Last Sales Activity** field to open the record for that activity.



You can also add reminders, key performance indicator portlets, and saved searches to your dashboard to determine leads, prospects, contacts, and opportunities that have not had any sales activities in the last week.

Last Sales Activity

Enabling CRM Features

Make sure the following CRM features are enabled before setting up Last Sales Activity:

- Customer Relationship Management
- Opportunities
- Marketing Automation (Enable this feature if you want the **Last Sales Activity** field to track the last marketing campaigns sent to a lead, prospect, customer, or contact.)

Use the following bundle information to install the Last Sales Activity SuiteApp (this is now automatically included on newly provisioned accounts):

- Bundle Name: Last Sales Activity
- Bundle ID: 53195
- Location: Repository
- Availability: Public

Last Sales Activity

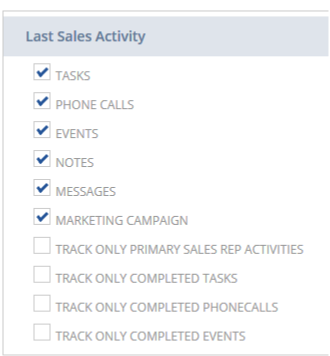
Setting Last Sales Activity Preferences

You must define the specific types of sales activities that you want to track. You can also further narrow down the definition of a sales activity by only counting activities with a completed status or only activities performed by the primary sales representative. **Note:** Only sales activities created by or currently assigned to users with a sales role (if you use the Team Selling feature) or is marked as a sales rep are tracked by the Last Sales Activity SuiteApp. Last Sales Activity is tracked even if the employee is logged in with a non-sales role when they create the activity, as long as the employee is set up as a sales rep or has a sales role.

Last Sales Activity

To configure Last Sales Activity preferences:

Go to Setup > Company > Preferences > General Preferences and click the **Custom Preferences** subtab.



On the Last Sales Activity group, check the boxes next to the types of sales activities that you want the Last Sales Activity SuiteApp to track. You can choose to track marketing campaigns, tasks, phone calls, events, notes, and messages.

Last Sales Activity

Activity	Description	Exceptions
Marketing Campaigns	Created on the Campaigns subtab of the customer record or at Lists > Marketing > Marketing Campaigns > New. Note: The Last Sales Activity field is updated when the marketing campaign emails are sent.	o Only activities from customers with one of the opt-in statuses update the LSA field. o Sales campaigns are not included in determining the LSA. o Creation of lead nurturing campaigns are not included in determining the LSA. Only marketing emails sent as part of a lead nurturing campaign are included in determining the LSA. o Marketing campaigns with Other Events update the LAS when the marketing campaign record is saved.
Tasks	Created on the Communication subtab of a customer record or at Activities > Scheduling > Tasks > New.	
Phone Calls	Created on the Communication subtab of a customer record or at Activities > Scheduling > Phone Calls > New.	
Events	Created on the Communication subtab of a customer record or at Activities > Scheduling > Events > New.	
Notes	Created on the Communication subtab of a customer record.	
Messages	Created on the Communication subtab of a customer record.	o Deleting a message does not update the last sales activity.

Last Sales Activity

- Check the **Track Only Completed Tasks, Track Only Completed Phone Calls**, or **Track Only Completed Events** boxes to only include those activities with the Completed status. Note: To narrow the records to only those with a completed status, you must first check the **Tasks, Events**, and **Phone Calls** boxes. The completed preferences will then become available.
- Check the **Track only Primary Sales Rep Activities** box to configure the Last Sales Activity SuiteApp to only track the sales activities of users that are designated as Primary Sales Rep.

Last Sales Activity

- Check the **Track Only Completed Tasks, Track Only Completed Phone Calls**, or **Track Only Completed Events** boxes to only include those activities with the Completed status. Note: To narrow the records to only those with a completed status, you must first check the **Tasks, Events,** and **Phone Calls** boxes. The completed preferences will then become available.
- Check the **Track only Primary Sales Rep Activities** box to configure the Last Sales Activity SuiteApp to only track the sales activities of users that are designated as Primary Sales Rep.
  - The following conditions apply when the Track only Primary Sales Rep Activities preference is used in conjunction with the Team Selling feature.
    - When both the Team Selling feature and the Track Only Primary Sales Rep Activities preference are enabled, only activities from the member of the sales team marked as the primary sales rep will be tracked by the Last Sales Activity SuiteApp.
    - When the Team Selling feature is disabled and the Track Only Primary Sales Rep Activities preference is enabled, only activities from sales users assigned as Sales Rep on lead, prospect, customer, opportunity, and contact records will be tracked by the Last Sales Activity SuiteApp.
    - When the Team Selling feature is enabled and the Track Only Primary Sales Rep Activities preference is disabled, only the activities of sales users who are members of a sales team will be tracked by the Last Sales Activity SuiteApp

Note: Sales activities performed for an opportunity or contact that are not linked to a customer record will not update the **Last Sales Activity** field. Last sales activities performed for opportunities and contacts that are not linked to customer records will only be tracked if both the Team Selling feature and the Track Only Primary Sales Rep Activities preference are disabled. All marketing campaigns and user notes activities performed for a contact record will not update the customer record's **Last Sales Activity** field. These activities will be tracked only on the specific record's **Last Sales Activity** field.

Last Sales Activity

- Enter a value in the **Activity Duration Filter (Days)** field to set the number of days to filter activities processed when updating Last Sales Activity. For example, to process only those entities with activities created or modified within the past week, set the field to 7. To process activities created or modified within the past month, set the field to 30. To process all entities, leave the field blank. The default value is 7 days.
- Check the **Enable LSA Manual Update** box to show the Update LSA button on record pages. This enables you to manually update the Last Sales Activity field on the record.
- Click **Save**.

Last Sales Activity

Setting Up the Last Sales Activity Saved Mass Updates
You must save the Last Sales Activity Mass Updates for the schedules to take effect. You only need to perform this procedure one time, after installing the Last Sales Activity SuiteApp.

To save the Last Sales Activity Mass Updates:

- Go to Lists > Mass Update > Saved Mass Updates. The Saved Mass Updates list is displayed.
- Click one of the following Last Sales Activity Mass Updates:
  - **LSA Contact Mass Update**
  - **LSA Customer Mass Update**
  - **LSA Opportunity Mass Update**
- Click **Save.**
- Repeat steps 2 to 3 for the other two Last Sales Activity mass updates.

Using the Last Sales Activity SuiteApp

The Last Sales Activity Field

You can view the **Last Sales Activity** field on lead, prospect, customer, contact, and opportunity records. The field displays the sales activity that was last performed for those records. Click the Last Sales Activity link to open the sales activity record.

The date for each sales activity displayed in the **Last Sales Activity** field is determined by whether they were completed or not.

For activities that were not completed, the following dates are displayed in the **Last Sales Activity** field:

- Task — Start date
- Phone call — Date
- Event — Date
- Note — Date of creation
- Message — Date of creation

For activities that were completed, the following dates are displayed in the **Last Sales Activity** field:

- Task — Date of completion
- Phone call — Date of completion
- Event — Date
- Note — Date of creation
- Message — Date of creation

Click **Update LSA** at the top of the record page to manually refresh the Last Sales Activity field on the record.

Sales Activity Reminders, KPIs, and Saved Searches

The Last Sales Activity SuiteApp comes with the following custom reminders, KPIs, and saved searches that you can use to receive notifications and summaries of leads, prospects, contacts, and opportunities that do not have sales activities for at least a week:

- Contacts Without Sales Activity in the last week
- Leads, Prospects, and Customers Without Sales Activity in the last week
- Opportunities Without Sales Activity in the last week

Set up your dashboard to use the custom reminders and KPIs.

Using Last Sales Activity Criteria for Searches

You can search for leads, prospects, customers, contacts, and opportunities based on Last Sales Activity.

You can define a date filter for a search based on a named time period (like last fiscal year) or based on a custom date range with a specific start date and end date.

To include last sales activity date in a search, on the **Results** subtab of the search page, select Last Sales Activity Fields... In the popup, select Last Sales Activity in the Last Sales Activity Filter field and set the date criteria.

Last Sales Activity Saved Mass Updates

You can use the following saved mass updates to find contacts, customers, and opportunity records with outdated Last Sales Activity field values and update them simultaneously:

- LSA Contact Mass Update
- LSA Customer Mass Update
- LSA Opportunity Mass Update

The Last Sales Activity mass updates are scheduled to automatically run daily. Alternatively, you can manually run the mass updates to update the **Last Sales Activity** field on contact, customer, and opportunity records.

Subsidiary Navigator (Beta)

The Subsidiary Navigator Portlet allows you to limit the information displayed on your dashboard, searches, and reports to a specific subsidiary. It contains a chart from which you can select the subsidiary whose records you want to display. Clicking a subsidiary is equivalent to setting the Restrict View to a subsidiary option in the Set Preferences page.

The chart enables you to restrict your access to records from the selected areas.

Note that the settings will apply for the duration of the current session. Normal settings will be restored upon next login.

Installing Subsidiary Navigator (Beta)

Prerequisites

Before you install Subsidiary Navigator, make sure that the following NetSuite features are enabled:

- Client SuiteScript
- Server SuiteScript
- Subsidiary

Installation

Subsidiary Navigator is available for installation as a SuiteApp:

- Name – Subsidiary Navigator
- Bundle ID – 44281
- Location – Production (Account ID 3802169)

Using Subsidiary Navigator (Beta)

Setting Up Subsidiary Navigator

- From the Home page, click **Personalize.**
- On the Standard Content section, click the green plus icon on the Custom Portlet icon. This adds a Custom Portlet to the dashboard.
- On the **Custom Portlet**, click the **Set Up** link. The **Custom Content** pop-up opens.
- On the **Source** field, select **Subsidiary Navigator** from the dropdown list.
- Click **Save.**
- The Subsidiary Navigator appears in the Custom Portlet on the dashboard.

Restricting Access Using the Subsidiary Navigator

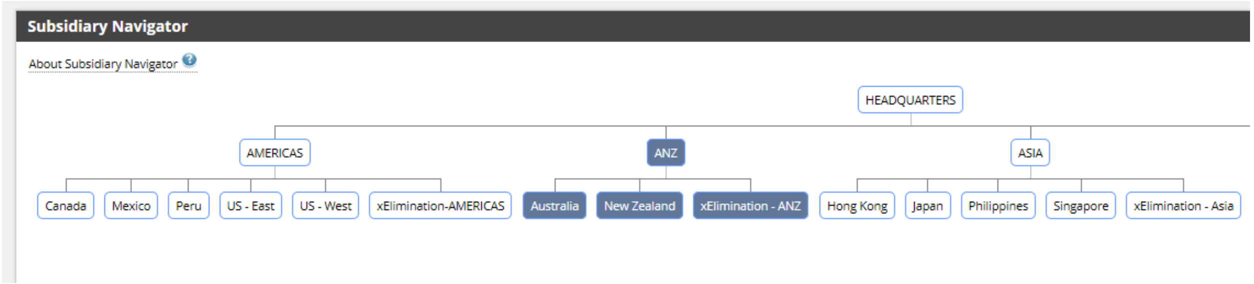
The Subsidiary Navigator Portlet allows you to limit the information displayed on your dashboard, searches, and reports to a specific subsidiary. It contains a chart from which you can select the subsidiary whose records you want to display. Clicking a subsidiary is equivalent to setting the Restrict View to a subsidiary option in the Set Preferences page.

The chart enables you to restrict your access to records from the selected areas.

Note that the settings will apply for the duration of the current session. Normal settings will be restored upon next login.

Subsidiary Navigator (Beta)

To restrict the view to a particular subsidiary or group of subsidiaries, click the subsidiary. This subsidiary and all of the sub-subsidiaries are selected. Portlets on the dashboard update automatically to show records for that subsidiary and its sub-subsidiaries.



Multi-Company Automation

This bundle enables you to automatically allocate vendor bills, journal entries, and checks from one subsidiary to one or more subsidiary. It's easy and fun!

Allows automatic allocation of vendor bills, journal entries, and checks to other subsidiaries in your OneWorld account.

Have a bunch of subsidiaries? Pay bills on behalf of those subsidiaries? Hate entering Intercompany Journal entries to allocate expenses? Checks that need to be allocated to other subs?

Multi-Company Automation – Set Up

Setup>Company>General Preferences>Custom Preferences

Specify your intercompany accounts

Enable Features>Accounting>Automated Intercompany Management

Setup intercompany vendor and customer for each subsidiary using the "Represents Subsidiary" field

Then change the form on the Bill, JE or Check to charge to another Subsidiary. A linked JE will be created.

Multi-Company Automation

This bundle enables you to automatically allocate vendor bills, journal entries, and checks from one subsidiary to one or more subsidiary. It's easy and fun!

Allows automatic allocation of vendor bills, journal entries, and checks to other subsidiaries in your OneWorld account.

Have a bunch of subsidiaries? Pay bills on behalf of those subsidiaries? Hate entering Intercompany Journal entries to allocate expenses? Checks that need to be allocated to other subs?

Multi-Company Automation

This bundle enables you to automatically allocate vendor bills, journal entries, and checks from one subsidiary to one or more subsidiary. It's easy and fun!

Allows automatic allocation of vendor bills, journal entries, and checks to other subsidiaries in your OneWorld account.

Have a bunch of subsidiaries? Pay bills on behalf of those subsidiaries? Hate entering Intercompany Journal entries to allocate expenses? Checks that need to be allocated to other subs?

Multi-Company Automation

Use the custom forms on the included transaction types to indicate the transfer:

CUSTOM FORM *

NMCA Check Form

Check

← → List Search Customize

9 Aaron Clark

Edit | Back | Void | Actions

Primary Information

TRANSACTION NUMBER
7

ACCOUNT
1000 Checking

BALANCE
-11,006,151.00

PAYEE
Aaron Clark

AMOUNT
1,000.00

CURRENCY
USA

EXCHANGE RATE
1.00

DATE
7/15/2016

POSTING PERIOD
Mar 2013

ADDRESS

TO BE PRINTED

CHECK #
9

MEMO

Classification

SUBSIDIARY
Accountingnerd, Inc.

Expenses & Items | Related Records | Relationships | Communication | System Information | Custom | EFT

Expenses 1,000.00 • Items 0.00

ACCOUNT	AMOUNT	MEMO	TRANSFER TO SUBSIDIARY	DEPARTMENT	CLASS	LOCATION	LINKED INTERCO TRANSACTION	REGION	HISTORY
6010 Advertising	500.00								History
6010 Advertising	500.00		Accountingnerd, Inc. : Nerd Sub, LLC				Journal #104		History

Multi-Company Automation

This creates a linked JE with the proper intercompany

Lines | Communication | Related Records | System Information | Custom | EFT

1,000.00 •

SUBSIDIARY	ACCOUNT	DEBIT	CREDIT	MEMO	NAME
Accountingnerd, Inc.	1290 Intercompany Receivable	500.00		Intercompany transaction created from check. (id = 1061)	Nerd Sub, LLC (Customer in Inc)
Accountingnerd, Inc.	6010 Advertising		500.00	Intercompany transaction created from check. (id = 1061)	
Nerd Sub, LLC	6010 Advertising	500.00		Intercompany transaction created from check. (id = 1061)	
Nerd Sub, LLC	2190 Intercompany Payable		500.00	Intercompany transaction created from check. (id = 1061)	Accountingnerd, Inc (vendor in Nerd Sub)

Questions?

This presentation is presented with the understanding that the information contained does not constitute legal, accounting or other professional advice. It is not intended to be responsive to any individual situation or concerns, as the contents of this presentation are intended for general informational purposes only. Viewers are urged not to act upon the information contained in this presentation without first consulting competent legal, accounting or other professional advice regarding implications of a particular factual situation. Questions and additional information can be submitted to your Eide Bailly representative, or to the presenter of this session.

EideBailly®

CPAs & BUSINESS ADVISORS

Thank You!

Dana Larson
drlarson@eidebailly.com
303.459.6757

EideBailly®

CPAs & BUSINESS ADVISORS