



## Look Up A Guest

NetSuite has very dynamic search capability and more than one way to efficiently accomplish a task. The Global Search box can be used by more advanced users. When you are learning the system start with the Guest Look Up portal.

Before getting started understand the difference between the Edit and View option of a record

<b>Edit</b>	Allows you to update fields and change information on a record
<b>View</b>	Does not allow you to make changes on a record but does allow you to take actions on the record like schedule, reschedule, or cancel fulfilment

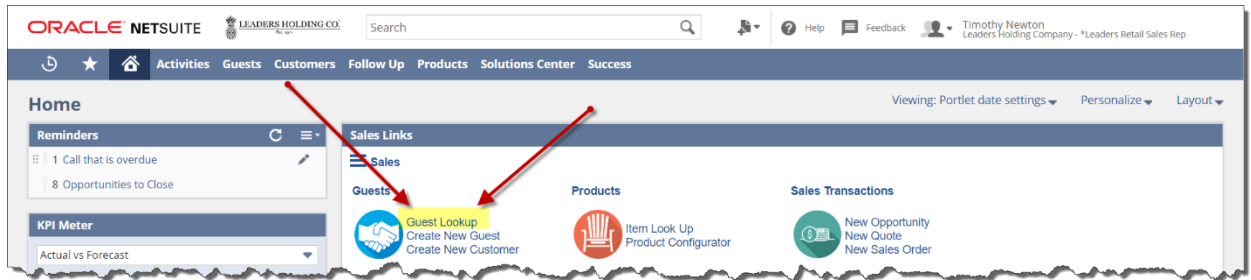
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## Getting Started

### Using the Guest Look Up portal

1. To get started, from the NetSuite Home Screen Click the “Guest Lookup” portal or from the Global Search.



2. You should see the screen below. You can search by Email, Phone Number, Last Name, or Company Name. You can search with partial information if the guest cannot remember the specifics. You can also change the filters on how the search is conducted but it is recommended that you leave them they way they are set.

It is not recommended to use the Advanced Search. While you can click it, the options are unnecessary and confusing.

Search By	What	Results
Email	To find all customer records related to the email address	Account or accounts related to a specific email account
Phone	Find all customer records related to the phone number	Account or accounts related to a specific phone number
Last Name	Find all customers with a specific last name	All accounts with the last name that was searched
Company Name	Find all businesses with a particular name or word(s) in their name	Business accounts

3. Type in your search criteria and press submit.

**Hint:** Don't type too much. The more you type and the more specific you are the more concise your results will be. Typing too much puts you at risk of not getting your intended result because of a misspelling or grammar error.

4. You should see the results like the following page.

## Search Results

### Helpful Hints:

- ✓ You can sort by any column by clicking on the header
- ✓ You can use the standard windows search function CTRL + F to search the results on screen

**Oracle NetSuite** | LEADERS HOLDING CO. | Search

Activities | Guests | Customers | Follow Up | Products | Solutions Center | Success

### Lookup Guest: Results


Return To Criteria

**1 FILTERS**

EMAIL **2** PHONE **3** LAST NAME **4** FIRST NAME **5** COMPANY NAME **6** CUSTOMER TYPE **7** STYLE **20**

**8** EDIT **9** **13** **14** **15** **16** **17** **18** **19** 3 — Anne Barcant **20** TOTAL: 29382

EDIT   VIEW	FIRST NAME	LAST NAME	COMPANY NAME	ADDRESS 1	CITY	ZIP CODE	PHONE	EMAIL	DATE OF LAST SALE
<b>10</b>   <b>11</b>			3 Rd Avenue Design	289 9Th St S	Naples	34102	(239) 435-0677		
Edit   View			3 Rd Avenue Design	105 Clubhouse Dr # 156	Naples	34105	(239) 435-0677		
Edit   View	Scott	NXT-Test		123 My St	San Diego	92117	(281) 328-1665	snance@nxtturn.com	
Edit   View	Scott	NXT-Test		1011 Edgemere Drive	Fort Myers	33919	(281) 328-1665	snance@nxtturn.com	
Edit   View	Angela	Roelle		6303 126th Ave	Largo	33773-1864	(541) 520-2012	angela@nxtturn.com	
Edit   View	Tuesday	Testing							

	Field	What	Notes
1	Filters	Area where search criteria is entered	Search fields can disappear if the filter's gray line is clicked or collapsed. If you don't see filters click the gray line to expand.
2	E-Mail	Search by email	
3	Phone	Search by phone number	Can be entered with or without dashes
4	Last Name	Search by last name	
5	First Name	Search by first name	Can search any letter combinations
6	Company Name	Search by company name	Designer and Commercial accounts will have a company name
7	Customer Type	Search by customer type	
8		Print your search results	
9	Edit Toggle		Not used for this screen. On some screens this will allow in line editing.
10	Open in Edit Mode	Open the line item in Edit Mode	Opening in Edit Mode allows you to make changes to the record but does not allow you to progress to the next step till the changes are saved and the document is in View Mode.
11	Open in View Mode	Open the line item in View Mode	Opening in View Mode allows you to verify the record detail then progress to the next step. If you open in View Mode and see a change that needs to happen you will have the option to click Edit to make changes.
12	First Name	First name on the customer record	
13	Last Name	Last name on the customer record	
14	Company Name	Company name on the customer record	Designer and Commercial accounts only
15	Address 1	Main address on the customer record	
16	City	City on the customer record	

Lookup Guest: Results

Return To Criteria

**FILTERS**

EMAIL  PHONE  LAST NAME  FIRST NAME  COMPANY NAME  CUSTOMER TYPE  STYLE

**EDIT**

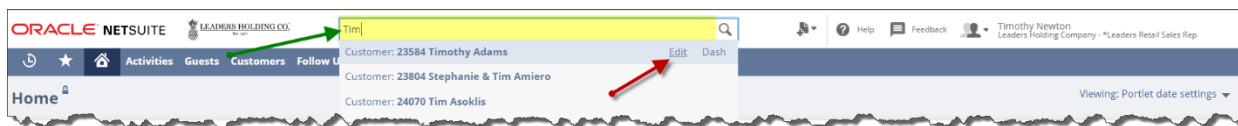
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Tuesday	Testing							

3 — Anne Barcant TOTAL: 29382

	Field	What	Notes
17	Zip Code	Zip for main address on the customer record	
18	Phone	Main phone number on the customer record	
19	Email	Main Email on the customer record	
20	Total Results	Number of search results returned from your search criteria	
21	List	A full list of customer records	You should not need to use this link. It brings you to a full list of customer records
22	Search	Native advanced search	You should not need to use this.

## Using Global Search

1. From the top of any NetSuite window type in the guest name you are looking for. NetSuite will make suggestions based on what you type in.
2. Click on the record you are looking for to go View mode. Hover over the name and Edit will appear on the right of the line. Click edit to open the record in Edit mode.





## Open in Edit or View?

Once you get your results you will have the option to open a record in Edit or View mode.

<b>Edit</b>	Allows you to update fields and change information on a record
<b>View</b>	Does not allow you to make changes on a record but does allow you to take actions on the record like write a New Opportunity, Quote or Sale, or Open a Solutions Case

## Addresses View or Change

The address tab is directly under the primary information. You must click the  icon on the right side of each record for most of the options.

<b>Edit</b>	<ul style="list-style-type: none"><li>✓ Set default shipping address</li><li>✓ Set default billing address</li><li>✓ Change the name of an address record</li><li>✓ Edit an address</li><li>✓ Add a new address</li></ul>
<b>View</b>	<ul style="list-style-type: none"><li>✓ See all address the customer has on file</li><li>✓ Click the  to map the address</li></ul>