Customer Communication In NetSuite

NetSuite has many points of automated communication to the guest. It tracks this communication in Quote and Sales Order record. You can resend communication and documents using NetSuite functionality.

Table of Contents

# When Does NetSuite Automatically Email A Guest?

| When?	What?	Why?
When a Quote is Saved	A copy of the quote with limited information so that the guest cannot easily cross shop.	To give the guest a record of their interests.
When a Sales Order Is Save	A detailed copy of the items, the color selection, fulfilment type, and total of this contract. An ownership packer for each separate brand on the guests Sales Order.	For the customer to have a detailed receipt for their transaction and clear ownership, care and maintenance information to make their ownership experience the best it can be.
When Fulfilment is Scheduled	A message confirming the fulfilment date and what to expect.	To prepare the guest for a successful and exciting delivery.
After Fulfilment is Complete	A message letting the guest know how to contact us should they need anything and thanking them for the opportunity.	To let the guest know their ownership experience is important to us.
6 Months After Delivery	Follow up with the guest to see if they need anything and to suggest additional items to complete their space.	To check in and make sure they are having a great ownership experience and to check to see if they have any other needs.
Every Anniversary After Delivery	Celebrate the anniversary of their purchase and to remind them of the care and maintenance products we sell. To remind them of the after the sale services we provide like replacement cushions.	To check in and make sure they are having a great ownership experience and to check to see if they have any other needs.

How Do I See What Information Has Been Sent?

1. From the NetSuite home screen use Guest Lookup to find the guest record.
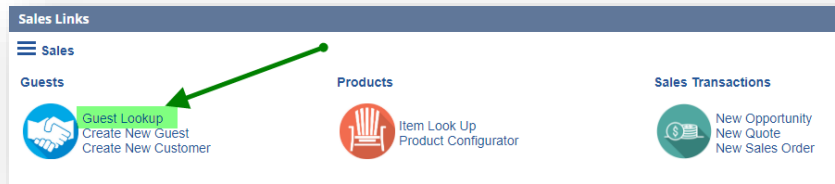
2. Open the guest record in View mode

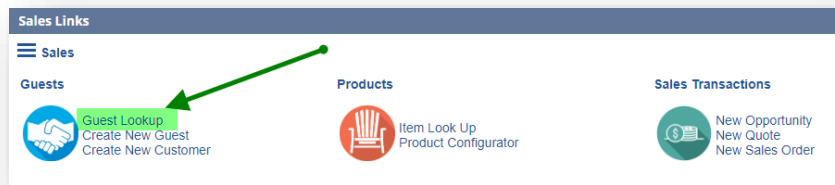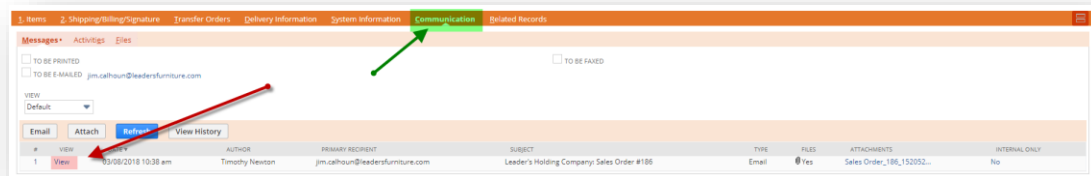3. On the "Transactions" or "Opportunity" tab locate the record you are referencing
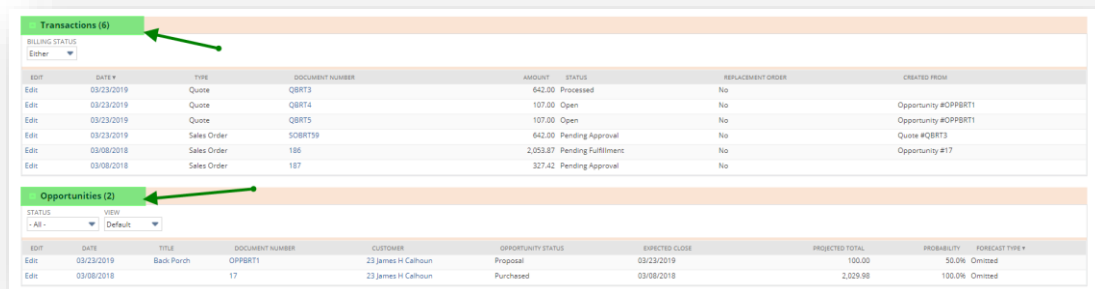
4. View the communication record for the transaction by going to the "Communication" subtab on the Sales Order or Quote and clicking View .
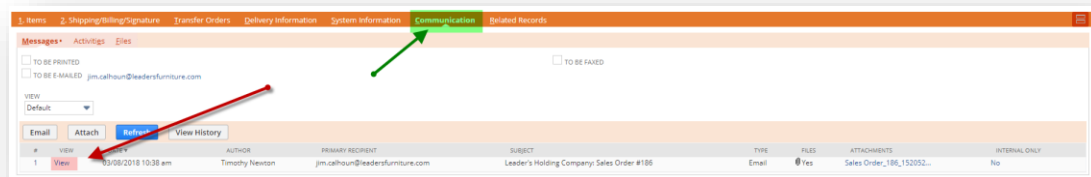
5. A pop up will allow you to view the details of the communication.

Resend Information

1. From the NetSuite home screen use Guest Lookup to find the guest record.

2. Open the guest record in View mode

3. On the "Transactions" or "Opportunity" tab locate the record you are referencing

4. View the communication record for the transaction by going to the "Communication" subtab on the Sales Order or Quote and clicking View .

5. A pop up will allow you to view the details of the communication and give you options   Choose the appropriate action.