



## The Customer Record

A customer record has all the information to successfully service a guest/customer. Aside from the standard contact information you can find the history of all the items they have purchased, transactions made, deliveries, returns, deposits, and credits.

A customer record could contain

- Basic customer information
- Opportunities
- Quotes
- Open sales
- Fulfilled sales
- Return Authorizations
- Deposits
- Invoices
- Payments
- Credits
- Solutions tickets
- Communication records

Before getting started understanding 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 Write a Sale, Quote, or Opportunity

## Table of Contents

Areas of the Form .....	2
Primary Information.....	2
Comments & Notes.....	3
Address Tab.....	3
Sales Tab .....	3
Items Purchased Subtab .....	3
Transactions Subtab.....	4
Opportunities Subtab.....	4
Support Tab.....	4
Financial Tab .....	5
Payment Token Tab .....	5
Credit Card Subtab.....	5
Account Summary.....	5

## Areas of the Form

**Primary Information**

**Comments & Notes**

**Tabs**

Field	What?	Notes
Customer Type	Sets the format of the form and Price Level	Retail, Designer, Commercial
Name	Customers Name	Semi unique identity for the record
Email	Email Address	Email address all of the receipts, order status, and ownership information will be sent to.
Phone	Main contact phone number	
Communication Preference	How the customer prefers to be communicated with.	
How Did You Hear About Us?	How the customer learned about Leaders	
Price Level	The line item pricing level for the customer record	Retail Commercial Designer
Current Status	This shows the record in the customer funnel	Must measure Need to discuss Waiting for sale Etc.
Resale Number and Expiration Date		

All forms in NetSuite have a the primary information, Tabs, and Subtabs. The customer form follows this format.

## Primary Information

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Current Status	This shows the record in the customer funnel	Must measure Need to discuss Waiting for sale Etc.
Resale Number and Expiration Date		

## Comments & Notes

Field	What?	Notes
Comments	Comments from the main customer record that will show on ever Sales Order or Return	
Delivery Notes	Comments from the main customer record that will show on ever Sales Order or Return	

## Address Tab

Address
Sales
Relationships
Support
Financial
System Information
Payment Token

ADDRESS INSTRUCTIONS  
Click the pencil on the far right side to pop up the address information and add or edit addresses. Click "Add" when done.

DEFAULT SHIPPING	DEFAULT BILLING	RESIDENTIAL ADDRESS	LABEL	ADDRESS	EDIT
Yes	Yes		444 Harbor N Dr	smith test 444 Harbor N Dr Indian Rocks Beach FL 33785-3115 United States	

This tab shows all of the addresses related to the customer record

## Sales Tab

### Items Purchased Subtab

The items purchased tab shows you all items that the customer has purchased or returned. It is a summary of the customer's transaction by item. In both Edit and View mode you can go to the Sales Order or invoice for each item.

Items Purchased
Sales Orders / Invoices / Quotes
Opportunities
BROS Sales Data

VIEW  
Items | Subtab with image

CUSTOMIZE VIEW

DATE	TYPE	DOCUMENT NUMBER	QUANTITY	PC BRAND THUMBNAI	IMAGE	PC OPTION 1	ITEM	DESCRIPTION	AMOUNT
08/02/2019	Invoice	INV08753	1			SMD - Smoke Blue	QARD-0111 - QARD-0111.SMD	Armaso Dining Chair: Stackable, SMD - Smoke Blue Finish, Beach Club	115.00
08/02/2019	Invoice	INV08756	4			SMD - Smoke Blue	QARD-0111 - QARD-0111.SMD	Armaso Dining Chair: Stackable, SMD - Smoke Blue Finish, Beach Club	460.00
08/02/2019	Invoice	INV08753	4			B - Black Finish & CRK - Cork Weave	QARD-0211 - QARD-0211.B.CRK	Armaso Barrio Dining Chair: Stackable, B - Black Finish & CRK - Cork Weave Color, Empire	320.00
08/02/2019	Invoice	INV08754	1			B - Black Finish & CRK - Cork Weave	QARD-0211 - QARD-0211.B.CRK	Armaso Barrio Dining Chair: Stackable, B - Black Finish & CRK - Cork Weave Color, Empire	80.00

## Transactions Subtab

The Transactions Summary tab shows a summary of the Quotes, Sales Orders, Invoices, and Credit Memos and Invoices for a customer's record. In both Edit and View mode you can go to the record for each transaction.

Items Purchased • Sales Orders / Invoices / Quotes • Opportunities • ERG Sales Data							
BILLING STATUS Either ▼							
DATE	TYPE	DOCUMENT NUMBER	AMOUNT	STATUS	REPLACEMENT ORDER	CREATED FROM	
06/02/2019	Quote	QBRT25	\$64.45	Processed	No	Opportunity #OPPBR78	
06/02/2019	Sales Order	SOBRT291	\$65.45	Billed	No	Quote #QBRT25	
06/02/2019	Invoice	INVBRT53	\$65.45	Paid In Full	No	Sales Order #SOBRT291	
06/02/2019	Sales Order	SOBRT292	\$5.60	Billed	No		
06/02/2019	Invoice	INVBRT54	\$5.60	Paid In Full	No	Sales Order #SOBRT292	
06/02/2019	Sales Order	SOBRT293	\$5.60	Billed	No		
06/02/2019	Invoice	INVBRT55	\$5.60	Paid In Full	No	Sales Order #SOBRT293	

## Opportunities Subtab

An Opportunity is a more detailed record of a Guest. It starts to outline the Guest's specific interests. Opportunities can be converted into quotes or sales orders.

Opportunities (0)										
STATUS		VIEW								
- All -		Default								
New Opportunity										
EDIT	DATE	TITLE	DOCUMENT NUMBER	CUSTOMER	OPPORTUNITY STATUS	EXPECTED CLOSE	PROJECTED TOTAL	PROBABILITY	FORECAST TYPE	
No records to show.										

## Support Tab

The support tab is where you see all the Solutions Center Cases for a customer record. You can click on a specific case to see a timeline of events and communication.

Support

Cases (0)

STAGE

- All -

AWAITING SUPPORT REPLY

- All -

VIEW

Default

New Case

View History

SUBJECT	NUMBER	STATUS	LAST MESSAGE DATE	PRIORITY	ASSIGNED TO	CONTACT
No records to show.						

## Financial Tab

The financial tab is full of good information. Here you can quickly see if a guest is owed money or has a store credit.

TERMS ☒ TAXABLE

**Balance Information**

BALANCE ON OPEN ORDERS 338.99	BALANCE ON FULFILLED ORDERS 0.00
OPEN SALES ORDERS 638.99	DAYS OVERDUE
DEPOSIT BALANCE 300.00	

Refund


## Payment Token Tab

### Credit Card Subtab

Deposits and credit card transaction records will be shown here. This is populated by using the credit card terminals.




Credit cards can be manually entered by the customer if they wish for us to save a credit card with their account. NetSuite will “tokenize” the data to store it in an encrypted way so the card can be used on the account at a later date.

## Account Summary

When viewing a customer record in Edit or View mode you can open a customer record summary by clicking on the 

ORACLE NETSUITE LEADERS HOLDING CO. Search


Activities Guests Customers Follow Up Solutions Center Success Products

 Customer  

23804 Stephanie & Tim Amiero

Save Cancel Reset Actions

Primary Information

CUSTOMER TYPE 

CUSTOMER RECORD INSTRUCTIONS  
A Customer record is a guest who has...