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

Edit	Allows you to update fields and change information on a record
View	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

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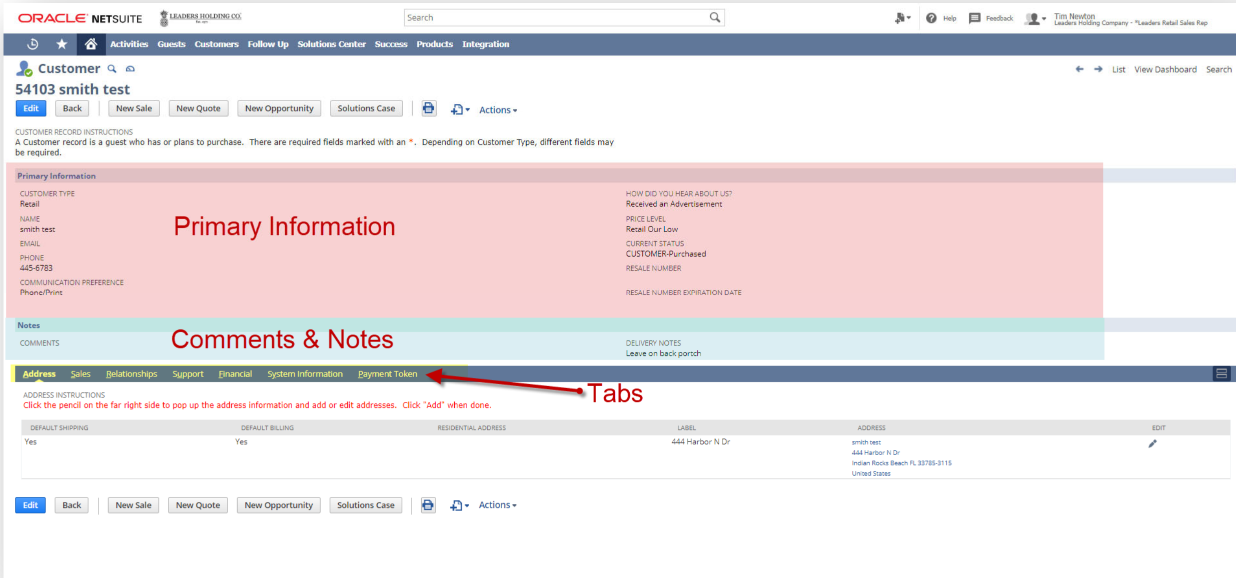
Areas of the Form



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

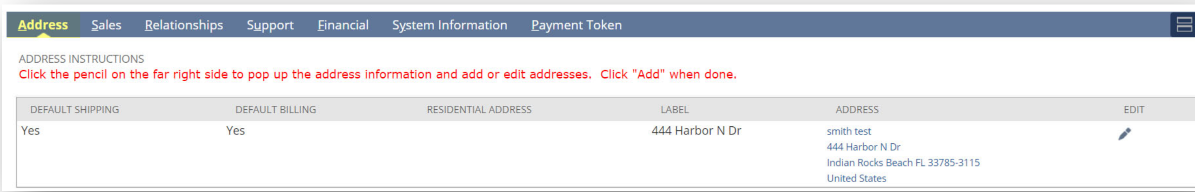
Primary Information

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		

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

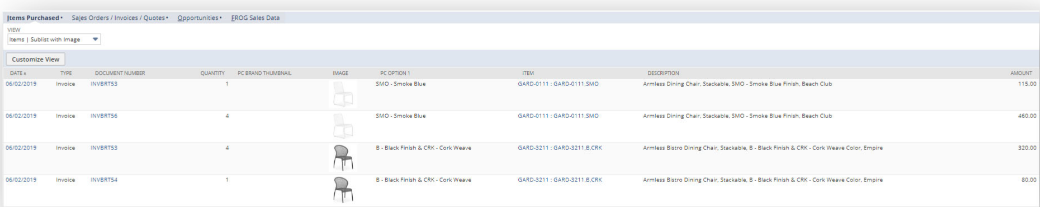


This tab shows all of the addresses related to the customer record

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.

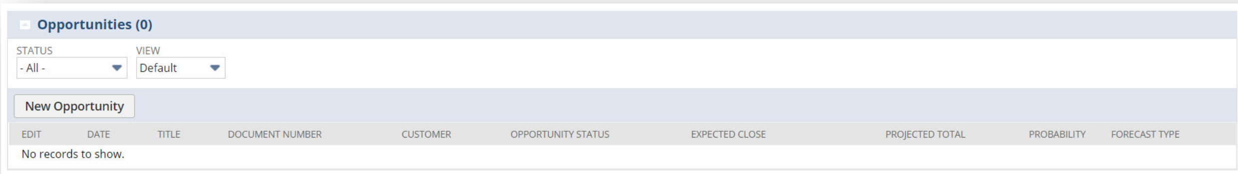


Transactions Subtab

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.

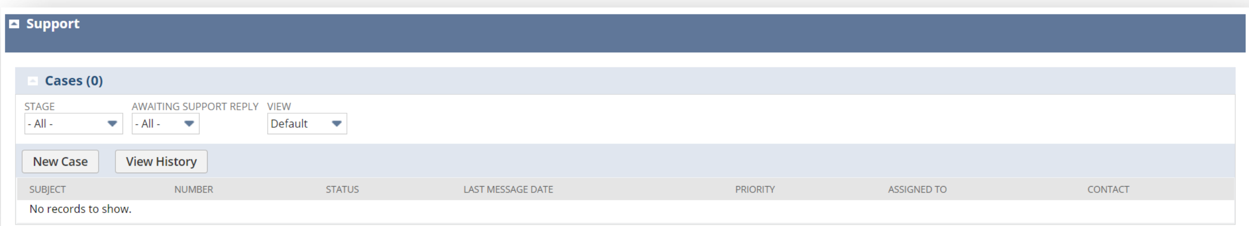
Opportunities Subtab

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.



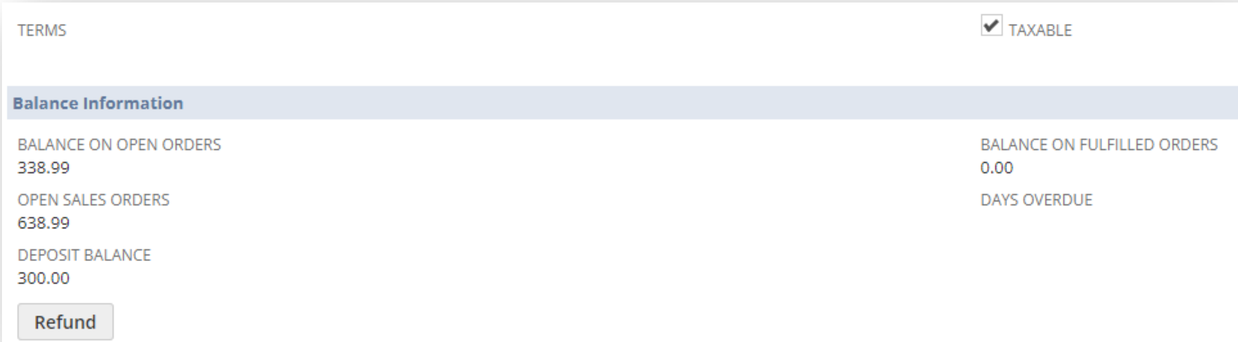
Support Tab

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.



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.



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