Customer E-mail Communication

To achieve the level of service guests expect from Leaders, we must communicate clearly and often. Below is an outline of the automatic and manual communication tools you have to make the best guest experience.

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Types of E-mail

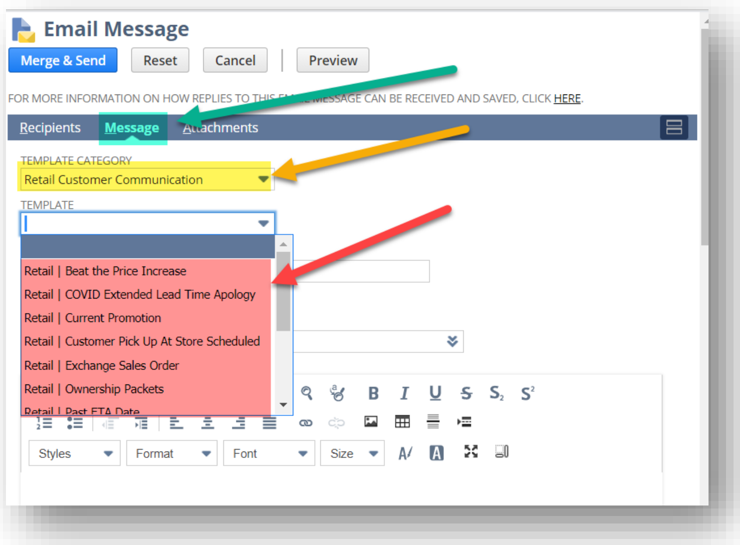
Automatic

Automatic e-mails are triggered by an activity in NetSuite. Usually, when a record is created for the first time or a record is changed.

Manual

The user sends manual e-mails by purposefully going to a record and sending an e-mail from it.

1. Go to a record you would like to attach to an e-mail
2. Click the link on the top of the page and select Email from the drop-down menu or go to the communication tab and select Email.
3. Select the Messages Tab
4. Select the "Retail Customer Communication" template category
5. Choose the template you would like to send.
6. Click Merge & Send
7. A copy of the e-mail will be attached to the record.
    a. An opportunity will not attach. There is not enough information to share.



Record of Sent E-mail

NetSuite makes a record of all e-mails sent out automatically and manually. These records can be referenced on the:

- ✓ Employee Record
    - On each team members Employee Record, there is a record of all the e-mails the team member sent out of NetSuite
- ✓ Customer Record
    - On each Customer Record, there is a record of every e-mail sent to the customer for every transaction
- ✓ Sales Order
    - On each Sales Order, there is a record of every e-mail sent regarding that Sales Order
- ✓ Solutions Center Case
    - On each Solutions Center Record, there is a record of every e-mail sent to the customer for the specific case

Available E-mail Templates

	Template	Auto	Manual
Before the Sale	Retail | Thank You For Visiting		M
	Retail | Quote		M
	Retail | Quote Follow Up		M
Sales Order	Retail | Sales Order Confirmation	A	M
	Retail | Ownership Packets	A	M*
Before Fulfilment	Retail | Everything Looks Good		M
	Retail | ETA Date Delay		M
	Retail | Ready To Schedule		M
	Retail | Past ETA Date		M
	Retail | Covid Extended Lead Time Apology		M
Fulfillment	Retail | Customer Pick-Up at Store Scheduled	A	M
	Retail | Your In-Store Pick Up is Ready		M
	Retail | Pick Up at the Distribution Center		M
	Retail Delivery Truck Scheduled Confirmation	A	
	Retail | Schedule Shipping Confirmation	A	
Returns/Exchanges	Retail | RA Scheduled Pick Up Confirmation	A	
	Retail | Exchange Sales Order	A	M
Retail	Retail | Current Promotion		M
	Retail | Beat the Price Increase		M
	Retail | Special Promotion		M
Miscellaneous	Retail | Casual Comfort Fire Notice		M

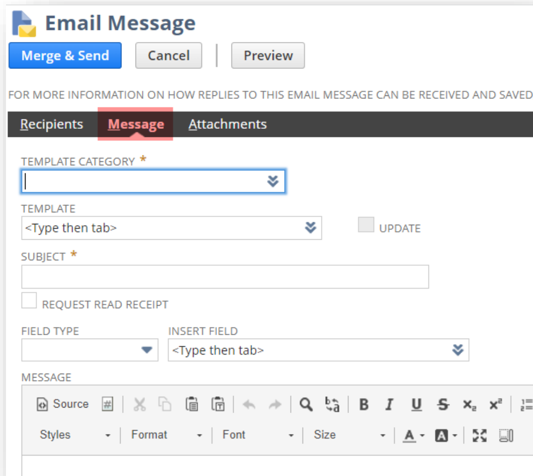
Ownership Packets can be sent manually through Outlook by composing an e-mail to the customer and dragging and dropping the ownership packets on the e-mail from:
R:\10 About the Solutions Center (Service)\12.0 Ownership Packets

Attach a File

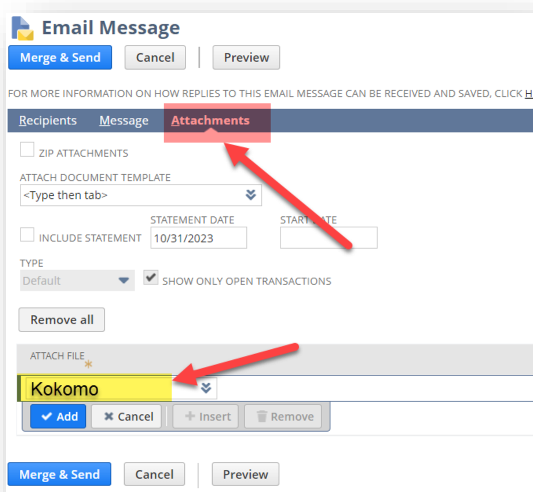
When sending an email to a guest you can attache Ownership Packets, Tear Sheats, or any other file stored in NetSuite.

When emailing a guest from an Opportunity, Quote, or Sales Order

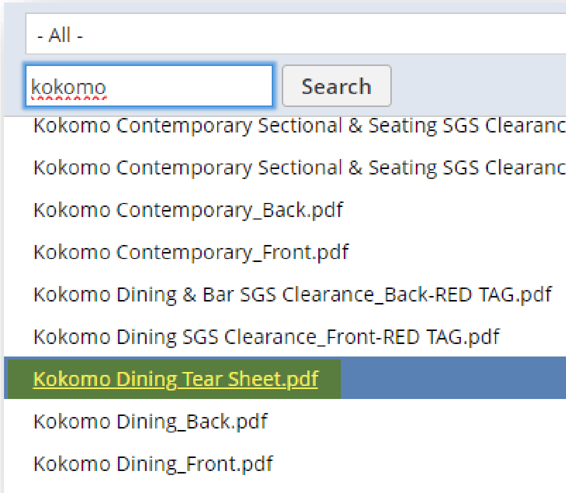
1. Compose your message or choose a template



2. On the Attachements tab, start typing the name of the collection.



3. Select the file name "Tear Sheet"
    a. Please do not send easels or price tags. Although this information is public in the showrooms, it can be confusing guests trying to understand the options pushing them away from a sale. Always make it easy for the guest.



4. Click 

5. You can add another file if you would like

6. Review your document to make sure you have included everything.

7. Click 

Test Messages- See for yourself

Want to send the messages to your e-mail so you can see them yourself?

1. From the record you would like to attach to the e-mail
2. Click the link on the top of the page and select Email from the drop-down menu.
3. In the Recipients Tab, erase the customer e-mail and type in the e-mail you want to send the test message to.
    a. This will not save to the Customer Record and will only apply to this instance.
4. Select the Messages Tab
5. Select the “Retail Customer Communication” template category
6. Choose the template you would like to send.
7. Click Merge & Send
8. A copy of the Opportunity will be attached to the e-mail.