CUSTOMER LIST

1. ZIP CODE MAP - This tab is simply a place where you can save a zip code map for your territory that you can easily refer to in order to see areas that are close to each other. This is particularly helpful when filtering by zip code on your Current Customers & Prospects tabs. If you know that two zip codes are in a close proximity, then you can filter to show only those two when planning your day. Google zip code map for your city, then use the snipping tool to cut it out of that webpage and paste it in this sheet. You may need to do this for multiple areas, depending on the size of your territory.

2. FORMATTING – This tab shows what can be entered in the Account column on Current Customers & Prospects tabs to initiate conditional formatting rules. Entering these will highlight the rows in corresponding colors, making it easier to find information. The only formatting that will work on the Prospects tab is NOY, because no current customers should be listed on this tab. In addition to this formatting, I manually highlight any leads that are a priority for me in bright colors, usually magenta so they stand out.

3. CURRENT CUSTOMERS & PROSPECTS– The best way to start inputting this information is to export all of your customer information from Netsuite. If you have information saved in Netsuite as My Customers & My Prospects, exporting separately would be ideal. If, not that's ok…you can manually separate the information after you export it.

- To export customer information from Netsuite:
  On the dashboard, under Navigation Portlet, click on Customers. On the top left, there is a drop-down box that you can change views. You will need to export from each category – My Customers, My Prospects & My Leads (if applicable).

  Once the view is selected, click on Edit View. Scroll down and click inside the drop-down box to add fields to display. You should have Customer Name, Phone & E-mail already selected. You will want to add Address 1, Address 2, Billing Address 1, A/P Contact, Attention, Billing City, Billing State/Province, Billing Zip, City & Zip Code.

  You may not have anything in the fields under Address 2, A/P Contact or Attention but I like to have all information available so I check those.

  Now, click on Preview and when the new screen comes up, click the icon to export to excel.

  I like to save this export to my computer, then copy and paste the information into the Customer List spreadsheet on Current Customers tab. If you have My Prospects & My Leads to export, do the same for those and paste in Prospects tab. If you do not have them separated in Netsuite, just sort them as you are copying and pasting.

Not all customers or contacts will come up with this export, but you can export individual contacts by going to the dashboard, under Navigation Portlet, and clicking on Contacts. Then, click Customize View. The only thing I add here is Address 1 & Mobile Phone. Click Preview & then click the export to excel button. If you want to do this, you can copy and paste all of your customer information with names, e-mail addresses and mobile numbers etc. after you have inputted all of the account information.

- When pasting data in the Customer List spreadsheet if there are multiple locations or buyers for an account, I only list the account on the first line in Company column and then list each department or buyer on the following rows. This makes it easier to jump between accounts when scrolling through. For example, there are 43 lines for City of Beaumont. Instead of scrolling through each one of them, if me cursor is on City of Beaumont in Company column, I can just hold the ctrl key and hit the down arrow to jump past all 43 lines to the next account. There is a column labeled Filter by (Column P) where I list all accounts on each row, just for filtering purposes and using when uploading to navigation apps (Road Warrior).

- To add rows in between accounts if you get new buyers or find new departments, just click on the row number and hit the plus sign or insert row. I sort my sheets A-Z so if there are others I need to add in between as time goes by, this is what I do.