



Understand the Account Records

Customer-Manufacturer Records

- These records are for our corporate team to enter opportunities related to customers (e.g., Ace Hardware, DIB, etc.) and our manufacturers (e.g., Toro, Whirlpool). This record ensures that both the customer and manufacturer receive proper credit for the work completed. It can be used to log anything related to the customer and manufacturer.
- Who will use this record the most at Saleslink?
 - **Corporate Team:** The corporate team will use this record to log opportunities related to customers and manufacturers, including meetings, emails, and other communications.
 - **Admin Team:** The admin team will use this record extensively to log activities for customer-manufacturer tasks, such as show preparation, portal updates, and other admin work. This is for work that isn't tied to an individual store or retail group.

Manufacturer Records

- When a new manufacturer partners with Saleslink, a manufacturer record is created. This record is used to log anything specific to that manufacturer. Note that this record is for manufacturer-related information only—not for anything related to customers. If it involves both the customer and manufacturer, use the customer-manufacturer record instead.
- Who will use this record the most at Saleslink?
 - **Corporate Team:** The corporate team will use this record to log activities related to the manufacturer.
 - **Admin Team:** The admin team will also use this record similarly to log day-to-day activities related to the manufacturer.

Customer Records

- Customer records are used to log anything completed specifically for that customer.
- Who will use this record the most at Saleslink?
 - **Admin Team:** The admin team will use this record to log anything related to the customer, such as show preparation, portal updates, etc.

Retail Group Records

- The retail group record is used by our field and support teams to log communications or touchpoints related to a retail group account. Using this record means that the activity applies to all locations within the group. This record also contains any embedded tasks, opportunities, and activities related to the retail group.
- Who will use this record the most at Saleslink?

- **Field Team:** The field team will use this record to log any touchpoints completed for the retail group.
- **Admin Team:** The admin team will use this record to log communications with the field rep related to the retail group or any communication that applies to all stores.
- **Corporate Team:** The corporate team will use this record occasionally if an opportunity or communication needs to be assigned to a retail group. However, they will mostly use customer-manufacturer records.

Retail Location Records

- The retail location record is used by our field and support teams to log communications or touchpoints related to an **individual store**. This record is used when the activity applies to a **single** location and also includes any embedded tasks, opportunities, and activities related to that specific store.
- Who will use this record the most at Saleslink?
 - **Field Team:** The field team will use this record to log touchpoints completed for that specific store.
 - **Admin Team:** The admin team will use this record to log communications with the field rep or any other interactions related to that particular store.