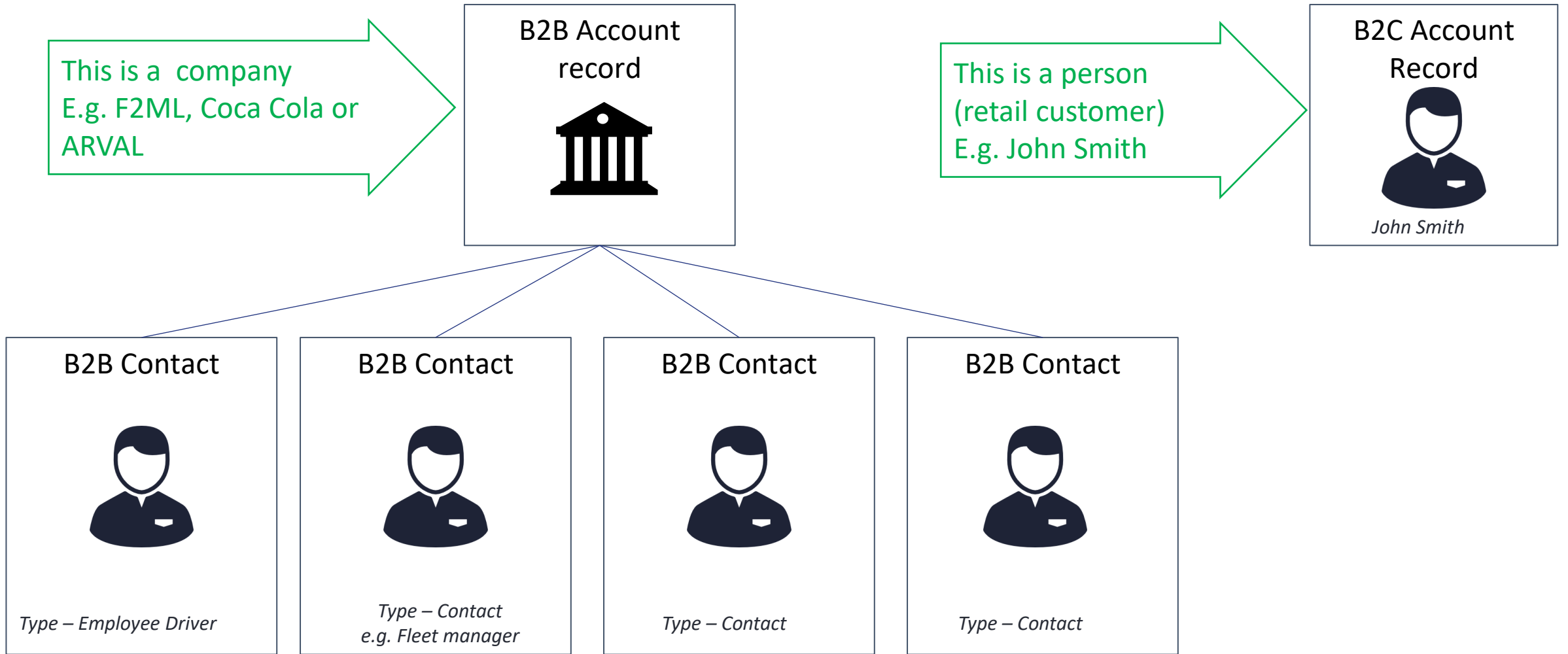




CUSTOMER FIRST ORDERING

Understanding and connecting record types



B2C Account record



This is a record belonging to an **individual** who is either a customer or prospect.

B2C Account records are only visible to retail sites who have had interaction with the person. This could be because the retail site has created the account record, qualified a lead from the person or has requested access using the secret question process.

Leaser record



This is a B2B account record (as above) which has been identified as a leaser. These records will appear in the 'leaser' drop down during the order flow.

B2B accounts and their CORE information are visible to ALL retail sites

B2B Account record



This is a record belonging to a **company or organisation** who are either a customer or prospect.

B2B accounts and their CORE information are visible to ALL retail sites

B2B Contact record



This is a record belonging to a **individual** who represents a B2B company. They are connected to B2B accounts and can be identified the 'primary contact' to be used for marketing etc. They are not B2C accounts (so would not have orders etc connected to them). They can have different roles (e.g. Employee Driver, contact)

Contacts are only visible to the retailer who has created them.

Quote and Order records



Every quote and order completed in the SDH part of Customer FIRST will be created as records in Customer FIRST

They can be linked to the relevant accounts (B2B & B2C) and each other

Quotes and orders are only visible to the retail sites who created them.

Lead record



Lead records are created by online requests from customers. They can be immediately closed as cold prospects, assigned to the retail network or call centre for qualification. Once qualified they create accounts and opportunities.

Leads are only visible to the retail sites which they are assigned to.

Asset record



When an order is delivered, an asset (vehicle) record is created.

Assets are linked to accounts (B2B & B2C) with different relationship types (owner, keeper, driver) either during the order/registration process or they can be manually connected. They are also linked to the order which created them.

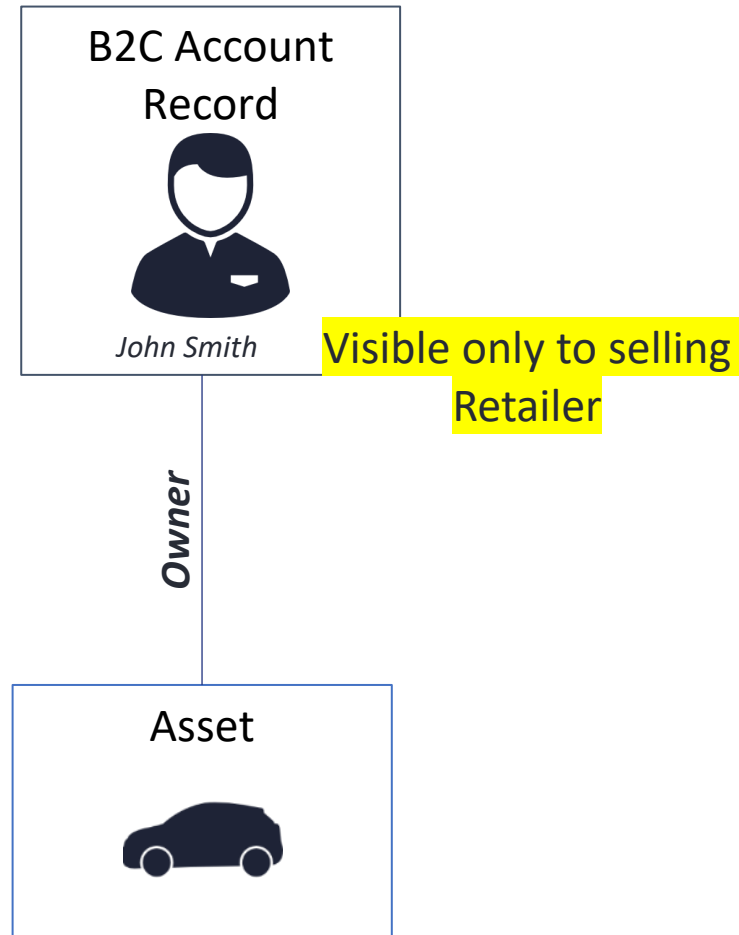
Assets are visible to all retail sites

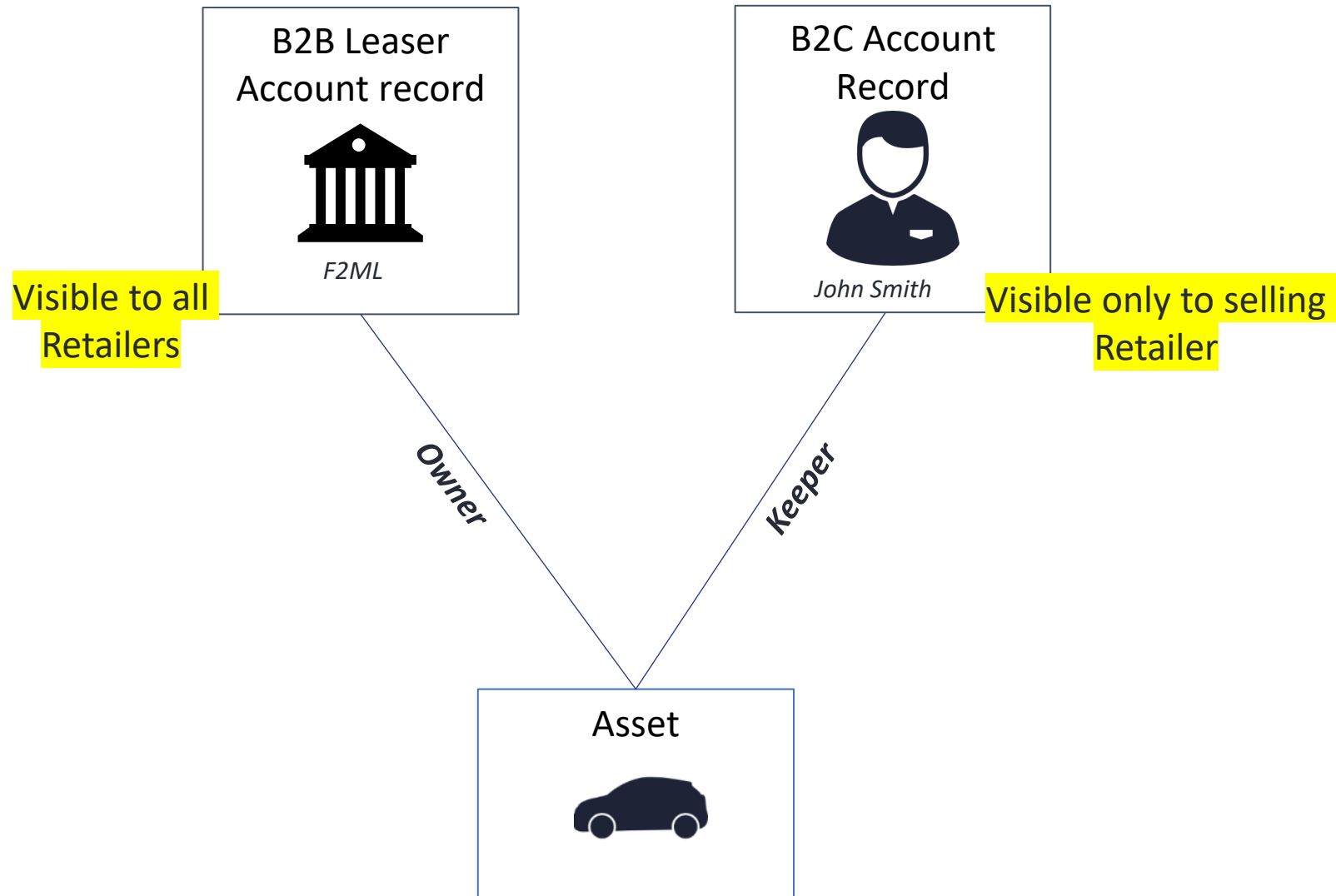
Opportunity record

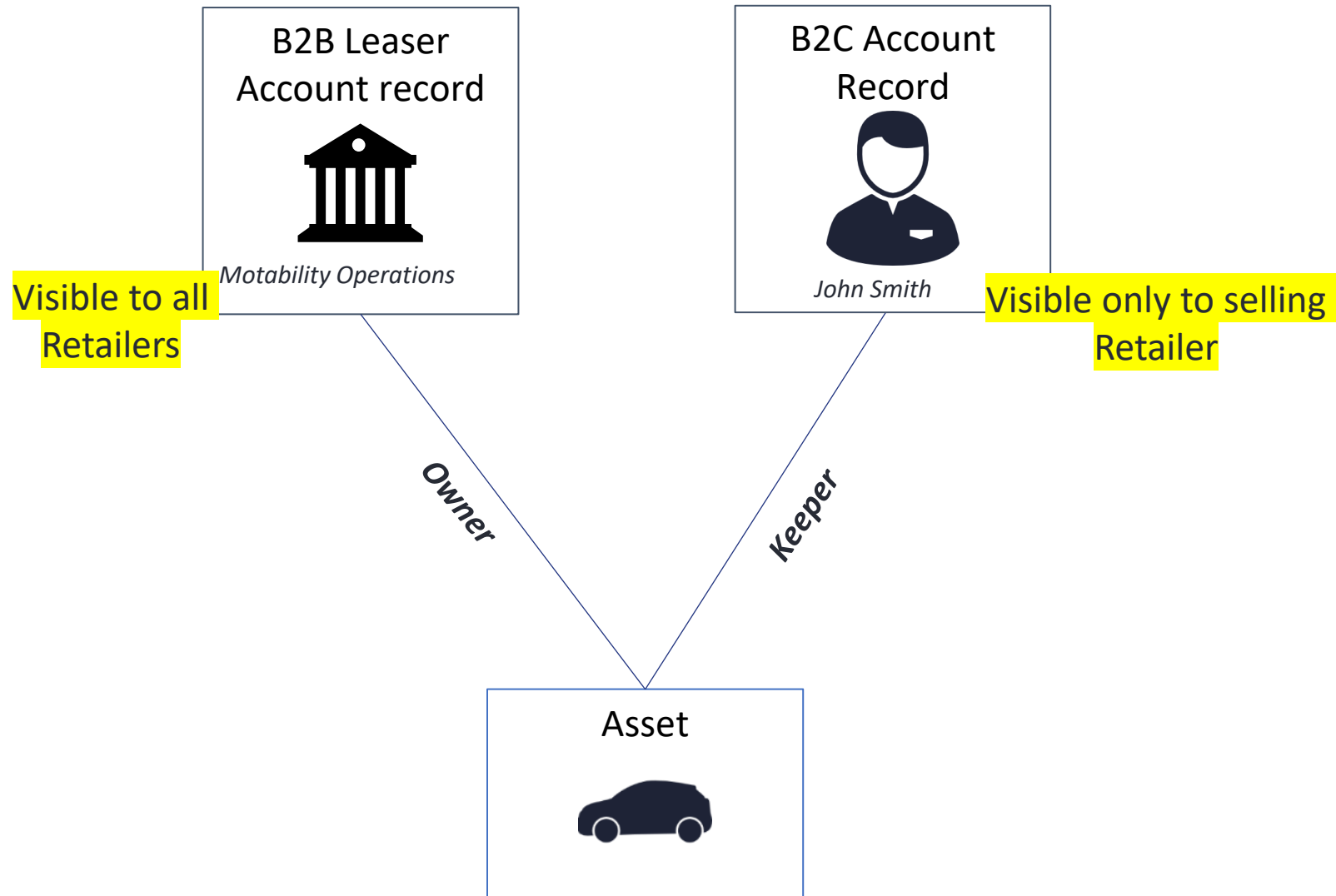


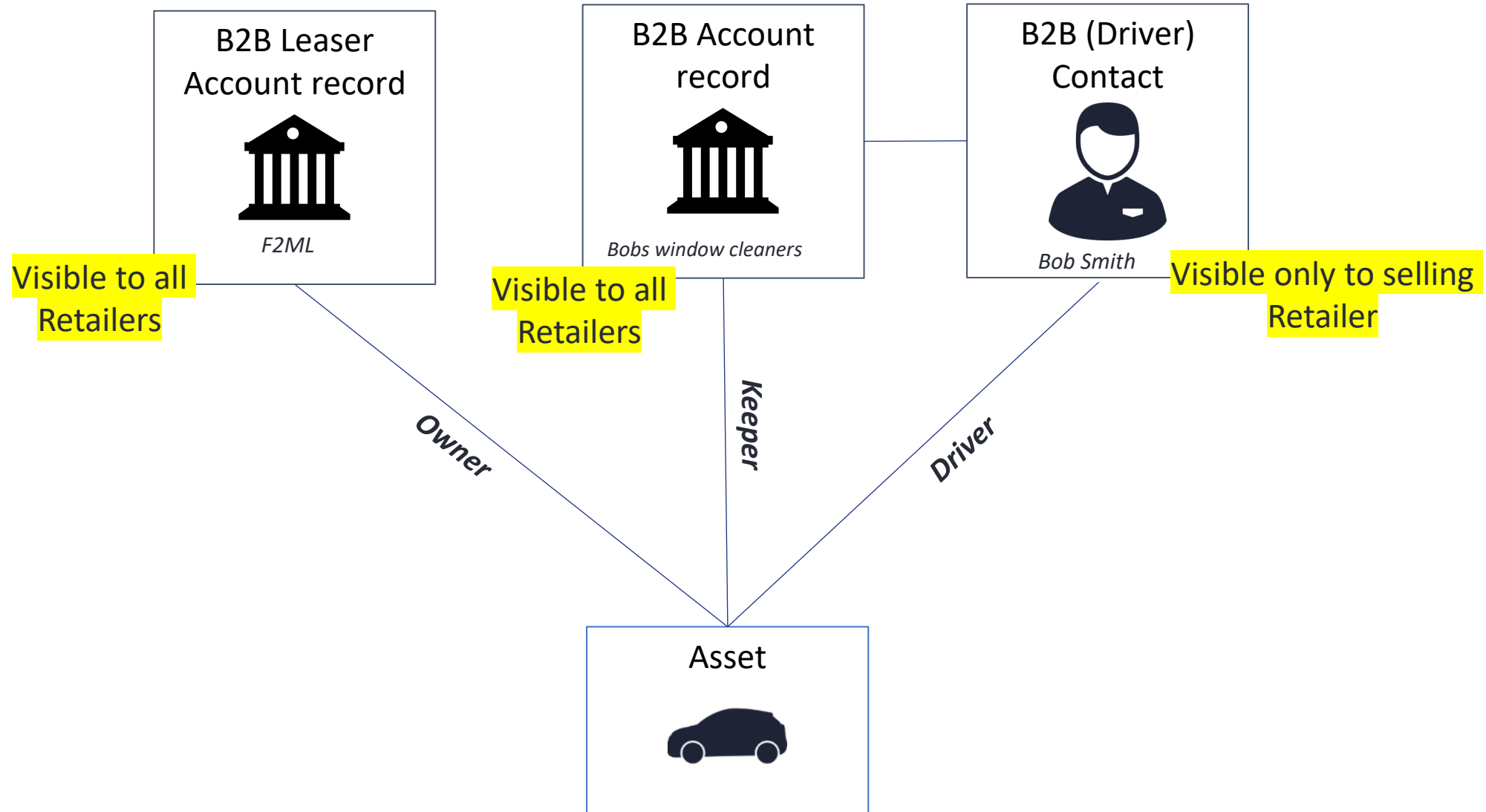
Opportunity records represent a sales opportunity. They are either created by qualifying a lead or can be created manually.

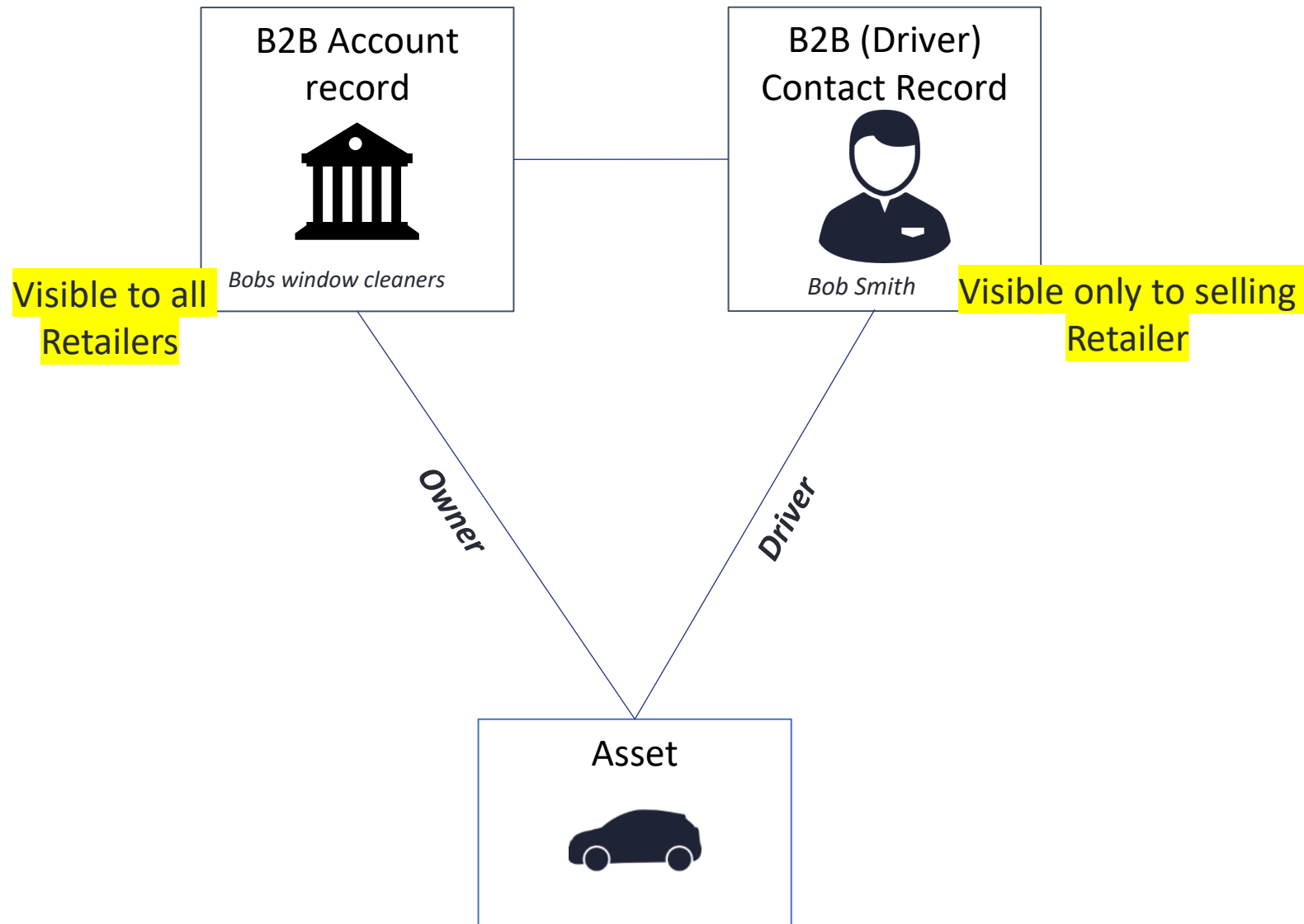
Opportunities are only visible to the retail sites who created them

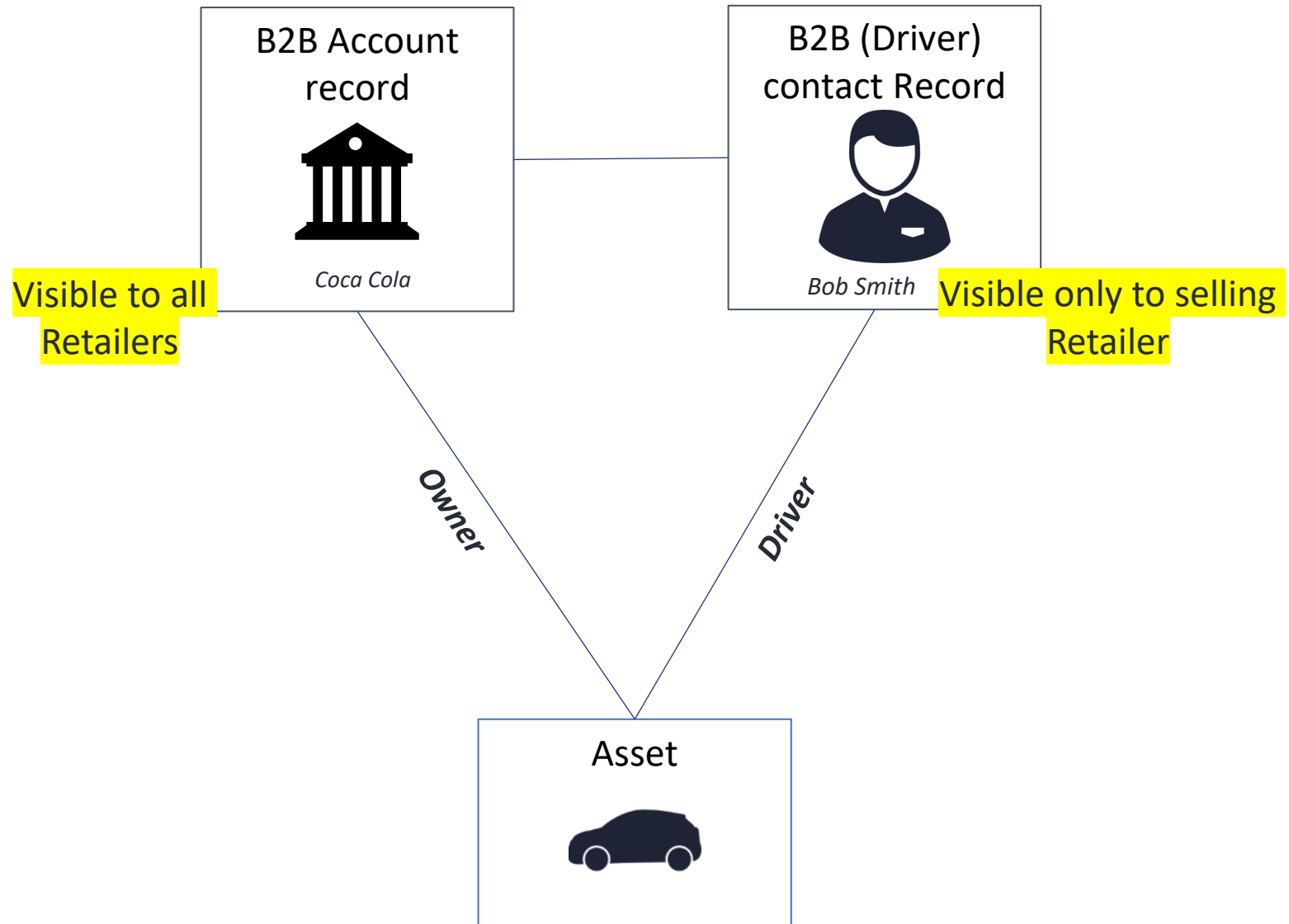


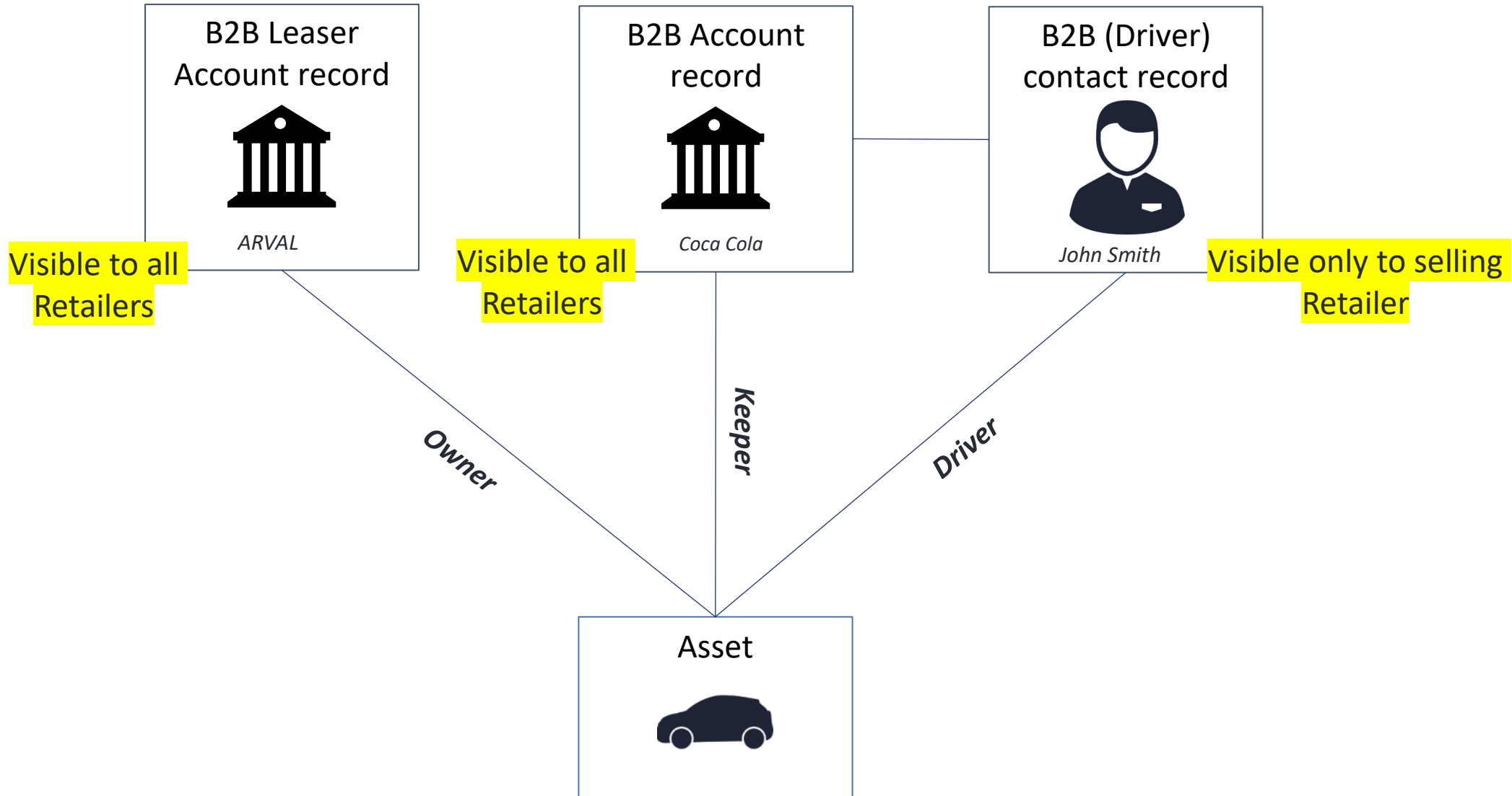


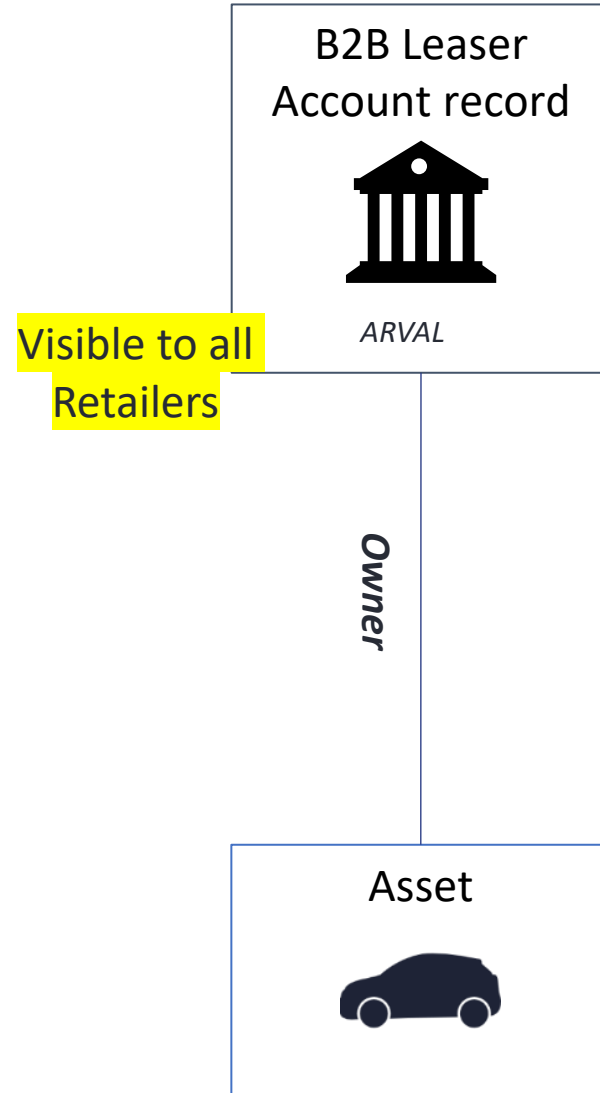












Note: The driver may come to us direct at a later stage (e.g. through the app) and could be connected as a driver.

