



# System Definitions Cheat Sheet

## NetSuite Company Types

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- **Lead:** An unqualified company with little or no engagement yet.
- **Prospect:** A qualified company actively being worked by sales.
  - This typically refers to the end user.
  - End users are not customers, because they do not purchase directly from us.
  - Prospects are tied to InspectAll. This is how you add Accounts in InspectAll.
- **Customer:** Companies we do direct business with, such as:
  - Distributors
  - Wholesalers
  - Associations
  - Vendors

## Contacts

- **Contact:** A person within a company.
  - Every contact must be attached to a company.
  - Used to track:
    - Communication
    - Follow-ups
    - Relationship history

## Business Relationship (Important Field)

- Used to categorize contacts and control corporate email targeting.
  - Distributor
  - Wholesaler
  - End User
  - IMR



## NetSuite Sales Activity

- **Opportunity:** A qualified deal with potential revenue.
  - Forecast revenue
  - Track deal progress
  - Document interactions related to the deal
- **Activities:** Activities track sales interactions in NetSuite.
  - Tasks (most commonly used)
  - Calls
  - Calendar Events
  - Customer engagement
  - Follow-ups
  - Account history

## InspectAll Definitions

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- **Account:**
  - Equivalent to a NetSuite Prospect.
  - Represents the End User company.
  - Accounts can have multiple locations.
- **Folder:**
  - Represents a site visit assigned to an account.
  - Each folder corresponds to a single location.
- **Location:**
  - Locations can have multiple areas.
- **Area:**
  - A specific department, zone or workspace within a location.
    - Examples:
      - Welding area
      - Warehouse area
      - Production line