

Customer Relationship Management (CRM)

Enhanced Customer 360 Metrics and Data Visibility Includes:

- Opportunities and Estimates tab: Four key metrics — Projected Total, Weighted Total, Opportunities Won, and Estimates Converted — now include direct links to workbooks. These links provide a deeper view of data.
- Orders and Returns tab: The metrics— Orders in the Year, Returns in the Year, In Progress Orders, and Average Order Value— have been enhanced with links to corresponding workbooks, providing a deeper view of data.
- Receivables tab: The metrics— Open Invoices, Overdue Invoices, and Available Credit Memos— now feature links to customer-specific workbooks, providing a deeper view of data.
- New Activity: An Activity tab has been added to expand on the Recent Activities shown on the Overview page. This new tab provides a comprehensive list of all customer activities and transactions such as Sales Order invoices, Credit Memo, Return Authorization, etc.
- The See Customer History link now directs you to the Activity tab instead of the workbook.

Improved Visibility into Automatic Location Assignment Processing:

- The Business Events Processing History section in the System Information tab of a sales order now provides improved visibility into how locations are assigned.
- By clicking the See More link, the user will see detailed messages explaining how automatic location assignment was evaluated and applied to each item. This will make it easier to understand how locations are selected, which rules were applied, and why certain locations were used—or not.
- The user can now see the reasoning behind location assignment decisions, including factors like missing postal codes, inventory availability, or location restrictions. This will provide better visibility into the processing flow, making it easier to trace how location assignment decisions are made for each order line.

If you have any questions related to the NetSuite 2025.2 Release, please reach out to your Meridian resource or email Meridian at mpower@meridianbusiness.com.