

Enterprise - Customer Visifile and Snapshot

Last Modified on 07/23/2020 3:08 pm CDT

What is the Customer Visifile?

The customer visifile is the first page you come to when you select a customer record. It will provide quick sets of important information for the customer including financials, contacts and messages.

The screenshot displays the 'Customer Visifile' for 'Trees & Leaves (Primary)'. The interface is divided into several sections:

- Header:** Customer name 'Trees & Leaves (Primary)', address '123 Leaf St, Shorewood, MN 55331', phone '(456) 123-1036', ID '4295013638', and Branch 'New Brighton'. It also shows 'Lunch Today' and 'Pay update confirm' notifications.
- Navigation:** A sidebar on the left lists options like 'visifile', 'details', 'defaults', 'documents', 'integrations', 'invoice history', 'invoice setup', 'evaluations', 'messages', 'payment history', 'tasks', and 'search'. The 'customer' section is currently selected.
- customer snapshot:** A summary of customer information including Customer Name, ID, Branch, Status, Parent ID, Root ID, and Notes.
- financials:** A table showing key financial metrics:

Last Payment	10/4/2019	YTD Sales	\$3,762.00
Balance Due	\$43,995.08	Lifetime Sales	\$65,695.74
AR Balance	\$47,757.08	Sales Trailing	\$8,734.50
Credit Limit	\$100,000.00		
- contacts:** A table listing contact information:

Name	Title	Email
Anderson, George	AP	g.anderson@leaves.xom
Constandza, George	AR	george@trees.xom
Timber, Ash	Supervisor	ash@treeleaves.xom
Wood, Leif	President	lief@treesNleaves.xom
- messages:** A table showing recent messages:

Date	Action	Message	Rep	Contact
12/10/2019	Email	Weekly Invoice	mkramer	Anderson, George (Trees & L
12/10/2019	Email	Weekly Invoice	mkramer	Constandza, George (Trees &
12/10/2019	Email	Weekly Invoice	mkramer	Timber, Ash (Trees & Leaves
10/9/2019	Ended	Customer: Trees & Leaves	elena.toninato	
10/9/2019	Ended	Customer: Trees & Leaves	elena.toninato	
10/9/2019	Ended	Customer: Trees & Leaves	elena.toninato	
10/9/2019	Ended	Customer: Trees & Leaves	elena.toninato	
10/9/2019	Ended	Customer: Trees & Leaves	elena.toninato	
10/9/2019	Ended	Customer: Trees & Leaves	elena.toninato	
10/9/2019	Ended	Customer: Trees & Leaves	elena.toninato	

Customer Snapshot & Financials

The customer snapshot provides important basic information about the customer record you are currently looking at. This includes the full customer name, ID, and status.

If this record is a department record for a larger company you will see the **Parent ID** field filled in with the ID of the parent department record. You can use this to easily identify a department vs. a primary record. Use the magnifying glass next to the ID to navigate to the parent department record.

The **notes** section here can be populated with quick important information that everyone should know about this customer when looking at their record. This can be helpful for quick things that will not change on the record but for more specific sets of information, we recommend utilizing the messages option below where you can see date and rep who saved the information.

Branch	New Brighton	Status	Active
Notes			

Customer Tree

The Customer Tree toggle will effect Financials, Contacts, and Messages shown on the visifile.

Customer Name	Buy N Large	Customer ID	4295013744
Parent ID		Root ID	4295013744
Customer Tree	Account View		

financials			
Last Payment	6/26/2020	YTD Sales	\$17,356.93
Balance Due	\$38,601.34	Lifetime Sales	\$364,536.49
AR Balance	\$38,601.34	Sales Trailing	\$104,891.11
Credit Limit	\$500,000.00		

Account View - This option will only show information from this specific record. This includes Contacts, messages logged, and financial details for this specific primary or department record you are looking for.

Master View - This option will include related department records, if applicable. Financials will include all financial details from any departments under the current record you are viewing. Contacts will include any contacts associated with any related department records including the primary. Messages will include messages from all related departments.

Check out [Enterprise - Departments](#) for more information on how departments work.

Financials

The financials section on the customer visifile will give you a quick snapshot on the customer's financial health and sales impact. Keep in mind these numbers can be different depending on the customer tree toggle options.

financials			
Last Payment	10/4/2019	YTD Sales	\$3,762.00
Balance Due	\$43,995.08	Lifetime Sales	\$65,695.74
AR Balance	\$47,757.08	Sales Trailing	\$8,734.50
Credit Limit	\$100,000.00		

- **Last Payment:** The date they last sent a payment to your staffing company. This date comes from [Accounts Receivable](#)
- **YTD Sales:** Includes the amount of money generated from sales in the current year (starting Jan. 1st)
- **Balance Due:** Displays the current balance the customer owes you. This includes any current or past due invoices based on the invoicing terms and due dates.
- **Lifetime Sales:** The total amount of revenue generated from sales for the entire time you have worked with this customer
- **AR Balance:** Displays the total balance the customer owes you. This includes invoices that have been processed but may not be due yet depending on the terms for this customer.
- **Sales Trailing:** Sales revenue generated in the last 12 months
- **Credit Limit:** Displays the customer's credit limit which can be set up under invoice setup > credit and payroll

Contacts

Contacts shown on the customer visifile are linked to this particular customer. This can include supervisors, AP contacts, Company Owners, etc. that you may need to reach out to at some point. You can use the + to quickly add new related contacts as you meet them.

contacts			+	✉
Name	Title	Email		
Mode, Edna	VP of Technology a...	edna@bnlspace.xom		
Smith, Jackson				

To learn more about contact records, check out [Enterprise - How to Add a Contact](#).

Messages

Messages allow you to document interactions and important information about a customer. Only the 20 most recent messages will be displayed on the visifile but the full list of messages will always be available under the

messages section of the customer record.

messages				
Date	Action	Message	Rep	Contact
10/9/2019	Ended	Customer: Buy N Large	elena.toninato	
10/9/2019	Ended	Customer: Buy N Large	elena.toninato	
10/9/2019	Ended	Customer: Buy N Large	elena.toninato	
7/3/2019	AR - 1st Call	Called Teddy to review late invoices and set up a payment sc...	amelia.stout	Newton, Teddy (Buy N Large)
3/4/2019	Ended	Customer: Buy N Large	alexander.swans...	
11/12/2018	Accepted	Customer: Buy N Large	hosteval19	
7/11/2018	React	open	hosteval2	
7/10/2018	Order Request	Sent in first Space and Tech division order for BNL!	amelia.stout	Mode, Edna (Buy N Large, S)

To learn more about messages, check out [Tips for Message Logging](#).

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