Toolkit Template
Client List

Objective: This template has been developed to record critical basic information related to your business' clients and any unique client strategies, processes or arrangements related to a client.

This specific template aids in organizing information about your clients or patients helping someone taking over the function have all the information in one place. This template should be completed for each client. This is designed for service or product companies. If the case of service companies some of the fields may be skipped.

- Client Name
- Client number
- Client Address
    - Street
    - State
    - Zip code
    - Phone
- Contacts
    - Name
    - Title
    - Email
    - Telephone
    - Preferred contact method and frequency
    - Repeat this for all contacts at this client
- Contract Terms
    - Pricing
    - Discount Amount
    - Minimum Order Size:
    - Maximum Order Size:
    - Payment Terms:
- Recent Order History
    - Order Date
    - Order Amount
    - Paid on time
- Pricing terms
    - Discount percentage

- Quantity tiers
- Product exclusions
- Specific conditions