Creating A Warranty Order In Netsuite Through A Sales Order
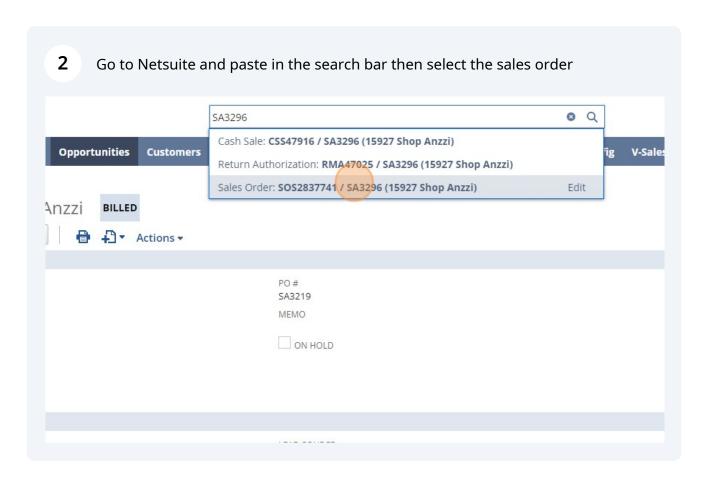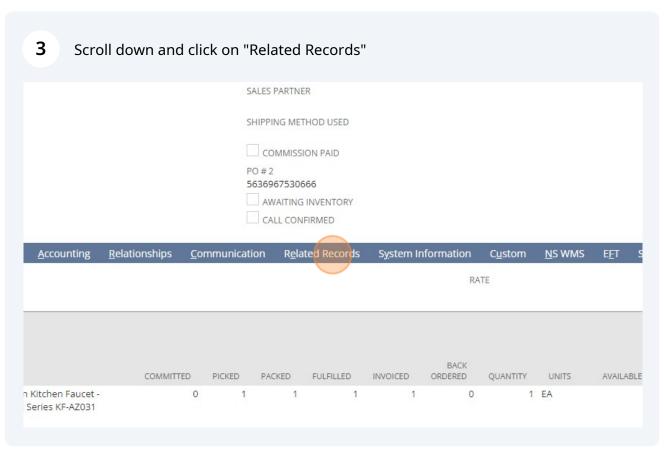
Scribe

1 Copy the order number from the message

2 Go to Netsuite and paste in the search bar then select the sales order

SA3296		⊗ 🔍

Cash Sale: **CSS47916 / SA3296 (15927 Shop Anzzi)**

Return Authorization: **RMA47025 / SA3296 (15927 Shop Anzzi)**

Sales Order: **SOS2837741 / SA3296 (15927 Shop Anzzi)**   Edit

Opportunities   **Customers**   **ig**   **V-Sales**

Anzzi   **BILLED**

🖨 📄▾ **Actions ▾**

PO #
SA3219
MEMO

☐ ON HOLD

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3 Scroll down and click on "Related Records"

SALES PARTNER

SHIPPING METHOD USED

☐ COMMISSION PAID

PO # 2
5636967530666

☐ AWAITING INVENTORY
☐ CALL CONFIRMED

Accounting   Relationships   Communication   Related Records   System Information   Custom   NS WMS   EFT   S

RATE

	COMMITTED	PICKED	PACKED	FULFILLED	INVOICED	BACK ORDERED	QUANTITY	UNITS	AVAILABLE
n Kitchen Faucet - Series KF-AZ031	0	1	1	1	1	0	1	EA	

4   Click "Support Cases"

CREDIT MEMO TYPE   COMMISSION PAID

REASON FOR RETURN   PO # 2
                                           5636967530666
                                           ☐ AWAITING INVENTORY
RETURN LABEL REQUEST   ☐ CALL CONFIRMED

| Items | Promotions | Shipping | Billing | Accounting | Relationships | Communication | **Related Records** | Syste |

SOLE CUSTOM CREATED WORK ORDERS

Related Records •   Support Cases •   Transformations

[Print]

DATE	TYPE	NUMBER
12/14/2023	Return Authorization	RMA47025
12/6/2023	Cash Sale	CSS47916
12/7/2023	Item Fulfillment	IF353652
12/7/2023	Wave	5824

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5   Click the case that was created when customer sent in images

                              5636967530666
                              ☐ AWAITING INVENTORY
                              ☐ CALL CONFIRMED

| hipping | Billing | Accounting | Relationships | Communication | **Related Records** | System Information | Custom | |

ORDERS

ort Cases •   Transformations

STAGE	AWAITING SUPPORT REPLY	SUPPORT CASE
- All - ▼	- All - ▼	⌄

[Customize View]

	NUMBER ▲	STATUS	LAST MESSAGE DATE
BN & RCVD MATTE BLACK	CASE36587	Closed	12/13/2023 5:06 pm

⊞▾ Actions ▾

6 Scroll down and click "Related Records"

INCIDENT DATE
12/13/2023 5:02 pm

INBOUND EMAIL ADDRESS

Return Authorization from Case

REF. NO. FROM
9/15/2023

SEARCH REF. NO. TYPE
Sales Order

ENABLE CREATE REF. NO.

REF. NO. TO
12/13/2023

SEARCH REFERENCE NUMBER

DESCRIPTION
ORDERED BN & RCVD MATTE BLACK

Communication	Related Records	Escalations	Metrics	System Information	Custom

Messages •   Activities   Files •   User Notes

VIEW
Case Default ▼

Email	Attach	Letter	PDF	Fax	**Refresh**	View History	Customize View

#	VIEW ▲	DATE	AUTHOR	MESSAGE	EMAIL SENT	PRIMARY RECIPIENT	CC	FILES	ATTACHMENTS	INTERNAL O
1	View	12/13/2023 5:06 pm	15927 Shop Anzzi	ORDERED BN & RCVD MATTE	No			No		No

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7 Click "New"

Return Authorization from Case

REF. NO. FROM
9/15/2023

SEARCH REF. NO. TYPE
Sales Order

ENABLE CREATE REF. NO.

REF. NO. TO
12/13/2023

SEARCH REFERENCE NUMBER

DESCRIPTION
ORDERED BN & RCVD MATTE BLACK

Communication	Related Records	Escalations	Metrics	System Information	Custom

Transactions   Case Related Records

VIEW *		BILLING STATUS	TYPE		TRANSACTION TYPE
Default ⌄		Either ▼	- All - ▼		Quote ▼

TRAN NO.
⌄

New	Attach	Customize View

LOADING.

Edit	Cancel		Enable Spam Lock		🖨	⊞▼	Actions ▾

8 Click "Sales Order"

9 Click on the customer field

10 If no shipping cost input "5029" and select Warranty Spa World Corporation"
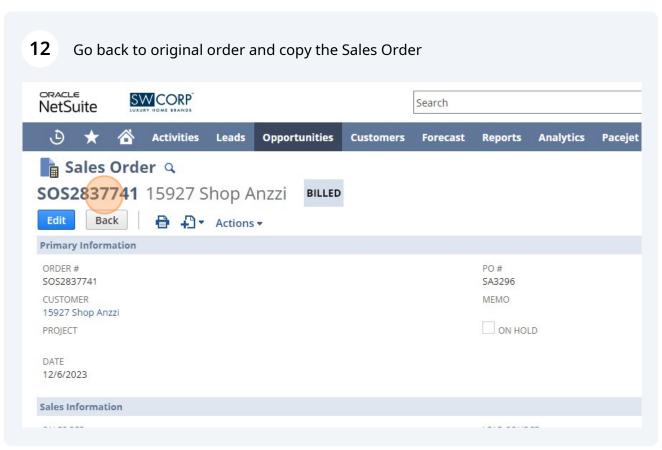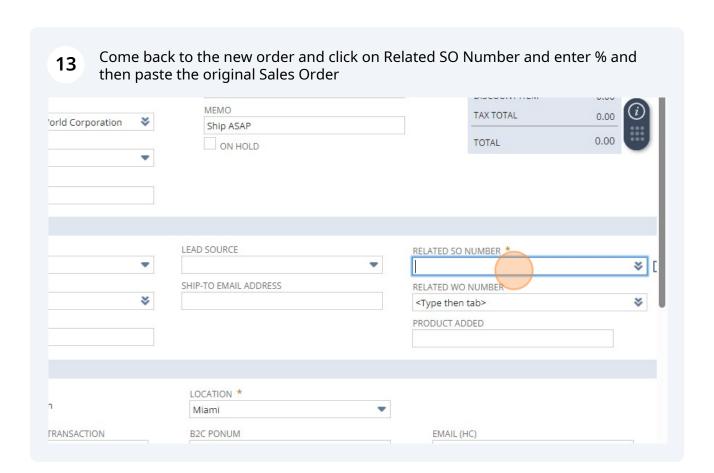If shipping fee type "1854" and select Spa World Parts SWP SWP

11   Click PO # and input your initials and then the order number

12   Go back to original order and copy the Sales Order

13 Come back to the new order and click on Related SO Number and enter % and then paste the original Sales Order

14 Select the Sales Order

15 Scroll down to item and enter the SKU/part number

Items	Promotions	Shipping	Billing	Accounting	Relationships	Communication	Custom	NS WMS	EF

DISCOUNT ITEM
RATE

Add Multiple   Intelligent Recommendations¹⁰   Clear All Lines   ☑ Configure

ITEM *		ITEM TYPE	DESCRIPTION	QUANTITY	UNITS
	⌄ + ⬚				

✔ Add   ✖ Cancel   ⧉ Copy Previous   ＋ Insert   🗑 Remove   ⬆ Intelligent Recommendations   **Edit Config**

Save ▼   Cancel   Auto Fill | Actions ▼

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16 Make sure Rate & Amount are set to 0

ns	Shipping	Billing	Accounting	Relationships	Communication	Custom	NS WMS	EFT	TC - EDI	PO A

RATE

Intelligent Recommendations¹⁰   Clear All Lines   ☑ Configure

QUANTITY	UNITS	AVAILABLE	ON HAND	INVENTORY DETAIL	PRICE LEVEL	CLASS		RATE	AMOUNT
1	EA	20	20		Custom	PARTS		0.00	0.00

🗑 Remove   ⬆ Intelligent Recommendations   **Edit Config**

el   Auto Fill | Actions ▼

Shipping | Billing | Accounting | Relationships | Communication | Custom | NS WMS | EFT | TC - EDI | PO A

RATE

Intelligent Recommendations¹⁰   Clear All Lines   ☑ Configure

	QUANTITY	UNITS	AVAILABLE	ON HAND	INVENTORY DETAIL	PRICE LEVEL	CLASS	RATE	AMOUNT
	1	EA	20	20		Custom	PARTS	0.00	0.00

🗑 Remove   ⬆ Intelligent Recommendations   Edit Config

:el   Auto Fill | Actions ▾

Shipping | Billing | Accounting | Relationships | Communication | Custom | NS WMS | EFT | TC - EDI | PO A

RATE

Intelligent Recommendations¹⁰   Clear All Lines   ☑ Configure

	QUANTITY	UNITS	AVAILABLE	ON HAND	INVENTORY DETAIL	PRICE LEVEL	CLASS	RATE	AMOUNT
	1	EA	20	20		Custom	PARTS	0.00	0.00

🗑 Remove   ⬆ Intelligent Recommendations   Edit Config

:el   Auto Fill | Actions ▾

17 Click "Add"

ITEM *	ITEM TYPE	DESCRIPTION	QUANTITY	UNITS	AVAILABLE	ON HAND	INVENTORY DETAIL
SD-AZ02BBH-R_Prt13	Inventory Item	Plastic Strip for SD-AZ02BBH-R_Prt13	1	EA	20	20	

Items Promotions Shipping Billing Accounting Relationships Communication Custom NS WMS

DISCOUNT ITEM   RATE

Add Multiple   Intelligent Recommendations¹⁰   Clear All Lines   ☑ Configure

✓ Add   ✗ Cancel   📋 Copy Previous   + Insert   🗑 Remove   ⬆ Intelligent Recommendations   **Edit Config**

Save ▼   Cancel   Auto Fill | Actions ▾

18 IF this is a 1854 order with shipping charges input "Shipping and Handling on Sales Order" if NO shipping....skip steps 19 - 22

DISCOUNT ITEM   RATE

Add Multiple   Intelligent Recommendations¹⁰   Clear All Lines   ☑ Configure

ITEM *	ITEM TYPE	DESCRIPTION	QUANTITY	UNITS
SD-AZ02BBH-R_Prt1 ITEM	Inventory Item	Plastic Strip for SD-AZ02BBH-R_Prt13	1	EA
Shipping and Handling on Sales Order	Other Charge	other charge for closing shipping charges	1	

✓ Add   ✗ Cancel   📋 Copy Previous   + Insert   🗑 Remove   ⬆ Intelligent Recommendations   **Edit Config**

19 Go to amount and enter shipping cost (if applicable)

ns	Shipping	Billing	Accounting	Relationships	Communication	Custom	NS WMS	EFT	TC - EDI	PO A

RATE

Intelligent Recommendations[10]   Clear All Lines   ☑ Configure

	QUANTITY	UNITS	AVAILABLE	ON HAND	INVENTORY DETAIL	PRICE LEVEL	CLASS	RATE	AMOUNT
	1	EA	20	20		Custom	PARTS	0.00	0.00
es	1					Custom	\<Type then tab\>		

🗑 Remove   ⬆ Intelligent Recommendations   **Edit Config**

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20 Click "Add"

Add Multiple   Intelligent Recommendations[10]   Clear All Lines   ☑ Configure

ITEM *	ITEM TYPE	DESCRIPTION	QUANTITY	UNITS	AVAILABLE	ON HAND	INVENTORY DETAIL
SD-AZ02BBH-R_Prt13	Inventory Item	Plastic Strip for SD-AZ02BBH-R_Prt13	1	EA	20	20	
Shipping and Handling on Sales Order	Other Charge	other charge for closing shipping charges	1				

✔ **Add**   ✖ Cancel   ⬚ Copy Previous   ✚ Insert   🗑 Remove   ⬆ Intelligent Recommendations   **Edit Config**

Save ▾   Cancel   Auto Fill   Actions ▾

21 Click "Shipping"

INTERCOMPANY STATUS
SHIPPING METHOD USED
CASTLEGATE ORDER

LAST MODIFIED DATE
TIME ORDER CREATED

COMMISSION PAID

REASON FOR RETURN
PO # 2
SALES ORDER CLOSED REASO

RETURN LABEL REQUEST
AWAITING INVENTORY
EXCLUDE FROM ELECTRONIC
CALL CONFIRMED

B2C CHANNEL
APPROVAL DATE

| Items | Promotions | **Shipping** | Billing | Accounting | Relationships | Communication | Custom | NS WMS | EI |

Shipping Information   **Shipping Address**

SHIP DATE
2/22/2024

SHIP TO SELECT
1119 Cliveden Ave

SO FORMULA SHIP DATE

SHIP TO
Barry Kirshenblatt
Barry Kirshenblatt
1119 Cliveden Ave
Delta, BC V3M 6G9
Canada

SHIPPING CARRIER
More

SHIPPING METHOD

Map

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22 Click the "+" sign to input customer's shipping information

AWAITING INVENTORY
CALL CONFIRMED
APPROVAL DATE
EXCLUDE FROM ELECTRONIC BANK PAYMENTS PROCESS

| ns | **Shipping** | Billing | Accounting | Relationships | Communication | Custom | NS WMS | EFT | TC - EDI | PO A |

on   **Shipping Address**

SHIP TO SELECT

ATE
SHIP TO

Map

MS
NS WMS SATURDAY DELIVERY
MCH ASN
NS WMS COD FLAG

23 Enter customer's information then click "Save"

DEFAULT SHIPPING

DEFAULT BILLING

RESIDENTIAL ADDRESS

LABEL

COUNTRY *

United States

ATTENTION

ADDRESSEE

Warranty Spa World Corporation

PHONE

SHIP EMAIL

ADDRESS 1

ADDRESS 2

ADDRESS

Warranty Spa World Corporation

Map

OVERRIDE

ENTITY

5029 Warranty Spa World Corporation

ADDRESS 2

CITY

STATE

ZIP

Save   Cancel

DEFAULT BILLING

RESIDENTIAL ADDRESS

LABEL

COUNTRY *

United States

ATTENTION

ADDRESSEE

PHONE

SHIP EMAIL

ADDRESS 1

ADDRESS 2

CITY

Map

OVERRIDE

ENTITY
5029 Warranty Spa World Corporation

United States

ATTENTION

ADDRESSEE

PHONE

SHIP EMAIL

ADDRESS 1

ADDRESS 2

CITY

STATE   ZIP

OVERRIDE

ENTITY
5029 Warranty Spa World Corporation

Save   Cancel

SHIP EMAIL

ADDRESS 1

ADDRESS 2

CITY

STATE   ZIP

Save   Cancel

24   Scroll down and click "Save"

SHIPPING METHOD   Map

✔ SHIP COMPLETE

NS WMS FREIGHT TERMS   ☐ NS WMS SATURDAY DELIVERY   ☐ MCH ASN

                              ☐ NS WMS COD FLAG

☐ NS WMS SIGNATURE REQUIRED   MARKETPLACE SHIPPING

NS WMS THIRDPARTY ACCOUNTNUMBER

EDI Outbound Stage   WMS_ASNC Parent

Clear All Lines

✔ Add   ✗ Cancel   + Insert   🗑 Remove

Save ▼   Cancel   Auto Fill | Actions ▾