

Creating A Warranty Order In Netsuite Through A Sales Order

1 Copy the order number from the message

The screenshot displays the Netsuite interface for a ticket. On the left, a sidebar contains navigation icons. The main area shows a ticket titled 'Re: Order SA3296 confirmed' with a status of 'Solved' and 'Ticket #246998'. The ticket is assigned to 'Support/Adria Bethel'. The message content includes a 'To: ANZZI, sales' field and a body text that says 'Your software changed both my shipping and billing addresses and would n'. The order number 'SA3296' is highlighted in an orange circle. The interface also shows a search bar with 'SA3296' and a list of tags including 'anzzizsupport', 'order', 'reassigned', 'sales', 'sales_inquiry', and 'support'.

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

Anzzi **BILLED**

Actions

PO #
SA3219
MEMO
☐ ON HOLD

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

RATE

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

4 Click "Support Cases"

CREDIT MEMO TYPE

REASON FOR RETURN

RETURN LABEL REQUEST

COMMISSION TYPE

PO # 2
5636967530666

☐ AWAITING INVENTORY

☐ CALL CONFIRMED

Items Promotions Shipping Billing Accounting Relationships Communication **Related Records** System

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	CS547916
12/7/2023	Item Fulfillment	IF353652
12/7/2023	Wave	5824

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

5636967530666

☐ AWAITING INVENTORY

☐ CALL CONFIRMED

Shipping Billing Accounting Relationships Communication **Related Records** System Information Custom

< ORDERS

Support Cases • Transformations

STAGE Awaiting Support Reply Support Case

- All - - All -

Customize View

	NUMBER ▲	STATUS	LAST MESSAGE DATE
BN & RCVD MATTE BLACK	<u>CASE36587</u>	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 OI
1	View	12/13/2023 5:06 pm	15927 Shop Anzzi	ORDERED BN & RCVD MATTE	No			No		No

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 *
Default

BILLING STATUS
Either

TYPE
- All -

TRANSACTION TYPE
Quote

TRAN NO.
↓

New Attach Customize View

LOADING.

Edit Cancel Enable Spam Lock Actions

8 Click "Sales Order"

ORACLE NetSuite SWCORP LUXURY HOME BRANDS

Search

Help Feedback Adria Bethe SW Corp - Sp

Activities Leads Opportunities Customers Forecast Reports Analytics Pacejet

Select Type

TYPE
Quote
Sales Order
Cash Sale
Purchase Order
Opportunity
Work Order

9 Click on the customer field

Sales Order

Save Cancel Auto Fill Actions

Primary Information

CUSTOM FORM * Spa World - Sales Order	STATUS * Pending Approval
ORDER # To Be Generated	PO #
CUSTOMER * 15927 Shop Anzzi	MEMO
PROJECT	<input type="checkbox"/> ON HOLD
DATE * 2/21/2024	

Sales Information

SALES REP Aimee Lefebvre	LEAD SOURCE	RELATED SO NUMBER <Type then tab>
OPPORTUNITY	SHIP-TO EMAIL ADDRESS	RELATED WO NUMBER

Summary

SUBTOTAL
DISCOUNT ITEM
TAX TOTAL
TOTAL

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

Sales Order

Save

Cancel

Auto Fill

Actions

Primary Information

CUSTOM FORM *

Spa World - Sales Order

STATUS *

Pending Approval

ORDER #

To Be Generated

PO #

MEMO

CUSTOMER *

5029

5029 Warranty Spa World Corporation

☐ ON HOLD

DATE *

2/21/2024

Summary

SUBTOTAL

DISCOUNT ITEM

TAX TOTAL

TOTAL

Sales Information

SALES REP

Aimee Lefebvre

LEAD SOURCE

RELATED SO NUMBER

<Type then tab>

OPPORTUNITY

<Type then tab>

SHIP-TO EMAIL ADDRESS

RELATED WO NUMBER

<Type then tab>

Sales Order

Save

Cancel

Auto Fill

Actions

Primary Information

CUSTOM FORM *

Spa World - Sales Order

STATUS *

Pending Approval

ORDER #

To Be Generated

PO #

MEMO

CUSTOMER *

1854

1854 Spa World Parts SWP SWP

1854:1 Spa World Parts SWP SWP : Scott Mullins

1854:2 Spa World Parts SWP SWP : Batucca .

1854:3 Spa World Parts SWP SWP : Patricia Floyd

1854:4 Spa World Parts SWP SWP : Laurie Slaney

18540 Jesse Martinez

18541 David Cuevas

18542 Bruce Boller

18543 Gladys Wilson

18544 Barbara Ray

LEAD SOURCE

RELATED SO NUMBER

<Type then tab>

SHIP-TO EMAIL ADDRESS

RELATED WO NUMBER

<Type then tab>

Summary

SUBTOTAL

DISCOUNT ITEM

TAX TOTAL

TOTAL

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

The screenshot shows the NetSuite Sales Order form. The top navigation bar includes icons for a clock, star, and home, followed by tabs: Activities, Leads, Opportunities (selected), Customers, Forecast, Reports, Analytics, and Pacejet. Below the navigation bar is the 'Sales Order' header with a search icon. Action buttons include 'Save' (with a dropdown arrow), 'Cancel', and 'Auto Fill', followed by an 'Actions' dropdown. The 'Primary Information' section contains several fields: 'CUSTOM FORM' (dropdown, 'Spa World - Sales Order'), 'ORDER #' (text, 'To Be Generated'), 'CUSTOMER' (dropdown, '1854 Spa World Parts SWP SWP'), 'PROJECT' (dropdown), 'DATE' (text, '2/21/2024'), 'STATUS' (dropdown, 'Pending Approval'), 'PO #' (text field, highlighted with an orange circle), 'MEMO' (text field), and an 'ON HOLD' checkbox. On the right, a 'Summary' table lists 'SUBTOTAL', 'DISCOUNT ITEM', 'TAX TOTAL', and 'TOTAL'. The 'Sales Information' section at the bottom has fields for 'SALES REP', 'LEAD SOURCE', and 'RELATED SO NUMBER'.

12 Go back to original order and copy the Sales Order

The screenshot shows the NetSuite Sales Order form for an existing order. The top navigation bar is identical to the previous screenshot. The 'Sales Order' header shows the order number 'SOS2837741' and customer '15927 Shop Anzzi', with a 'BILLED' status tag. Action buttons include 'Edit', 'Back', a print icon, a copy icon (highlighted with an orange circle), and an 'Actions' dropdown. The 'Primary Information' section displays: 'ORDER #' (SOS2837741), 'CUSTOMER' (15927 Shop Anzzi), 'PROJECT' (empty), 'DATE' (12/6/2023), 'PO #' (SA3296), 'MEMO' (empty), and an 'ON HOLD' checkbox. The 'Sales Information' section at the bottom is partially visible.

13

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

World Corporation	MEMO Ship ASAP <input type="checkbox"/> ON HOLD	<table border="1"> <tr> <td>TAX TOTAL</td> <td>0.00</td> </tr> <tr> <td>TOTAL</td> <td>0.00</td> </tr> </table>	TAX TOTAL	0.00	TOTAL	0.00
TAX TOTAL	0.00					
TOTAL	0.00					
<div>LEAD SOURCE</div> <div>SHIP-TO EMAIL ADDRESS</div>	<div>RELATED SO NUMBER *</div> <div>RELATED WO NUMBER</div> <div><Type then tab></div> <div>PRODUCT ADDED</div>					
<div>LOCATION *</div> <div>Miami</div>						
TRANSACTION	B2C PONUM	EMAIL (HC)				

14

Select the Sales Order

World Corporation	MEMO Ship ASAP <input type="checkbox"/> ON HOLD	<table border="1"> <tr> <td>TAX TOTAL</td> <td>0.00</td> </tr> <tr> <td>TOTAL</td> <td>0.00</td> </tr> </table>	TAX TOTAL	0.00	TOTAL	0.00
TAX TOTAL	0.00					
TOTAL	0.00					
<div>LEAD SOURCE</div> <div>SHIP-TO EMAIL ADDRESS</div>	<div>RELATED SO NUMBER *</div> <div>Sales Order #SOS2837741</div> <div>RELATED WO NUMBER</div> <div><Type then tab></div> <div>PRODUCT ADDED</div>					
<div>LOCATION *</div> <div>Miami</div>						
TRANSACTION	B2C PONUM	EMAIL (HC)				

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

Items Promotions Shipping Billing Accounting Relationships Communication Custom NS WMS EFT

DISCOUNT ITEM RATE

Add Multiple Intelligent Recommendations¹⁰ Clear All Lines ☒ Configure

ITEM *	ITEM TYPE	DESCRIPTION	QUANTITY	UNITS

Actions

16 Make sure Rate & Amount are set to 0

ns Shipping Billing Accounting Relationships Communication Custom NS WMS EFT IC - 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

Actions

ns Shipping Billing Accounting Relationships Communication Custom NS WMS EFT IC - EDI PQ 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

Cancel Auto Fill Actions

ns Shipping Billing Accounting Relationships Communication Custom NS WMS EFT IC - EDI PQ 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

Cancel Auto Fill Actions

17 Click "Add"

Items Promotions Shipping Billing Accounting Relationships Communication Custom NS WMS EF

DISCOUNT ITEM RATE

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

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

ITEM *	ITEM TYPE	DESCRIPTION	QUANTITY	UNITS
SD-AZ02BBH-R_Prt13	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	

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

ns Shipping Billing Accounting Relationships Communication Custom NS WMS EFT IC - 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
es	1				Custom	<Type then tab>		

Remove Intelligent Recommendations Edit Config

20 Click "Add"

Add Multiple Intelligent Recommendations¹⁰ 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				

Intelligent Recommendations Edit Config

Save Auto Fill Actions ▾

21 Click "Shipping"

LAST MODIFIED DATE

REASON FOR RETURN

RETURN LABEL REQUEST

B2C CHANNEL

SHIPPING METHOD USED

COMMISSION PAID

PO # 2

AWAITING INVENTORY

CALL CONFIRMED

APPROVAL DATE

CAS ILEGATE ORDER

TIME ORDER CREATED

SALES ORDER CLOSED REASON

EXCLUDE FROM ELECTRONIC BANK PAYMENTS PROCESS

Items Promotions **Shipping** Billing Accounting Relationships Communication Custom NS WMS EFT

Shipping Information Shipping Address

SHIP DATE

2/22/2024

SO FORMULA SHIP DATE

SHIPPING CARRIER

More

SHIP TO SELECT

1119 Cliveden Ave

SHIP TO

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

Map

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

AWAITING INVENTORY

CALL CONFIRMED

APPROVAL DATE

EXCLUDE FROM ELECTRONIC BANK PAYMENTS PROCESS

Shipping Shipping Address

SHIP TO SELECT

SHIP TO

Map

NS WMS SATURDAY DELIVERY

NS WMS COD FLAG

MCH ASN

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 2

CITY

STATE

▼

ZIP

Save

Cancel

ADDRESS

Warranty Spa World Corporation

Map

☐ OVERRIDE

ENTITY

5029 Warranty Spa World Corporation

☐ DEFAULT BILLING

☐ RESIDENTIAL ADDRESS

LABEL

COUNTRY *

United States ▼

ATTENTION

ADDRESSEE

PHONE

SHIP EMAIL

ADDRESS 1

ADDRESS 2

CITY

ATTENTION

ADDRESSEE

PHONE

SHIP EMAIL

ADDRESS 1

ADDRESS 2

CITY

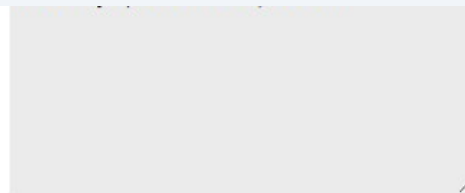
STATE

▼

ZIP

Save

Cancel



Map

☐ OVERRIDE

ENTITY

5029 Warranty Spa World Corporation

☐ OVERRIDE

ENTITY

5029 Warranty Spa World Corporation

SHIP EMAIL

ADDRESS 1

ADDRESS 2

CITY

STATE

ZIP

24 Scroll down and click "Save"

SHIPPING METHOD

☒ SHIP COMPLETE

NS WMS FREIGHT TERMS

☐ NS WMS SIGNATURE REQUIRED

NS WMS THIRDPARTY ACCOUNTNUMBER

☐ NS WMS SATURDAY DELIVERY

☐ NS WMS COD FLAG

MARKETPLACE SHIPPING

☐ MCH ASN

EDI Outbound Stage WMS_ASNC Parent