Sending Claims Emails In Netsuite

1 Go to Netsuite paste the sales order in the search bar

2 Click the sales order

3 Click "Related Records"

SALES PARTNER

SHIPPING METHOD USED

☐ COMMISSION PAID

PO # 2
5647177711786

☐ AWAITING INVENTORY

☐ CALL CONFIRMED

| Accounting | Relationships | Communication | **Related Records** | System Information | Custom | NS WMS | EFT | Sou |

ormations

AWAITING SUPPORT REPLY   SUPPORT CASE

- All - ▼   ⟱

w

4 Click "Support Cases"

CREDIT MEMO TYPE   ☐ COMMISSION PAID

REASON FOR RETURN   PO # 2
                                       5647177711786

RETURN LABEL REQUEST   ☐ AWAITING INVENTORY

                                        ☐ CALL CONFIRMED

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

SOLE CUSTOM CREATED WORK ORDERS

Related Records •   **Support Cases** •   Transformations

VIEW   STAGE   AWAITING SUPPORT REPLY   SUPPORT CASE

Case Default ▼   - All - ▼   - All - ▼   ⟱

[New Case]   [Attach]   [Customize View]

EDIT	SUBJECT	NUMBER ▲	
Edit	Ticket #250594	Box damaged, missing items	CASE37479	Cl

[**Edit**]   [Back] | 🖨   ⊕▾   Actions ▾

5 Click the case

5647177711786

☐ AWAITING INVENTORY
☐ CALL CONFIRMED

| Billing | Accounting | Relationships | Communication | **Related Records** | System Information | Custom | NS WMS |

▸ Transformations

AWAITING SUPPORT REPLY   SUPPORT CASE

▼   - All -   ▼   _____ ⟱

tomize View

	NUMBER ▲	STATUS	LAST MESSAGE DATE
amaged, missing items	CASE37479	Closed	2/6/2024 10:07 am

ctions ▾

---

6 Click on the create new button

📄 Case

CASE37479 Ticket #250594 | Box damaged, missing items 15927 Shop Anzzi

[Edit] [Cancel] | [Enable Spam Lock] | 🖨 ⊞▾ Actions▾

Disposition Information

CONTACT CHANNEL	CONTACT REASON		PART
E-mail	Missing Part		
CUSTOMER	SALES OPPORTUNITY		
15927 Shop Anzzi			

Create New
📧 Email
📄 Letter
📕 PDF
📋 Task
📞 Phone Call
👥 Event
📄 File
📝 Note
📄 Case Related Records
Personalize

Primary Information

NUMBER	PROFILE
CASE37479	Spa World Corporation
SUBJECT	ASSIGNED TO
Ticket #250594 | Box damaged, missing items	Ruel Joseph
	CONTACT
SUBSIDIARY	
Spa World Corporation	Medium
	EMAIL(S)	QUICK NOTE
	arcs@swcorp.com	

Incident Information

7   Click "Email"

Case

ASE37479 Ticket #250594 | Box damaged, missing items 15927 Shop Anzzi

Edit   Cancel | Enable Spam Lock | 🖨️   ➕▾   Actions ▾

Create New
- 📧 Email
- 📝 Letter
- 📄 PDF
- 📋 Task
- 📞 Phone Call
- 👥 Event
- 📄 File
- 📒 Note
- 📄 Case Related Records

Personalize

sposition Information

ONTACT CHANNEL -mail	CONTACT REASON Missing Part		PART
USTOMER 5927 Shop Anzzi	SALES OPPORTUNITY		

rimary Information

UMBER
ASE37479

UBJECT
icket #250594 | Box damaged,
issing items

UBSIDIARY
pa World Corporation

PROFILE
Spa World Corporation

ASSIGNED TO
Ruel Joseph

CONTACT

EMAIL(S)
arcs@swcorp.com

Medium

QUICK NOTE

cident Information

---

8   Click email address and enter claims@swcorp.com

📧 Email Message

Merge & Send   Cancel | Preview

FOR MORE INFORMATION ON HOW REPLIES TO THIS EMAIL MESSAGE CAN BE RECEIVED AND SAVED, CLICK <u>HERE</u>.

Recipients   Message   Attachments

RECIPIENT
15927 Shop Anzzi ▾

EMAIL ADDRESS *
claims@swcorp.com

Select existing recipients from the list below. To add new recipients, insert the email address into the email field. Click Add after each line.

ADDITIONAL RECIPIENTS	EMAIL *	TO	CC	BCC
<Type then tab> ⌄		Yes		

✔ Add   ✖ Cancel   ➕ Insert   🗑 Remove

Merge & Send   Cancel | Preview

9 Click "Message"

Email Message

[Merge & Send] [Cancel] | [Preview]

FOR MORE INFORMATION ON HOW REPLIES TO THIS EMAIL MESSAGE CAN BE RECEIVED AND SAVED, CLICK HERE.

Recipients   Message   Attachments

RECIPIENT
15927 Shop Anzzi ▼

EMAIL ADDRESS *
claims@swcorp.com

Select existing recipients from the list below. To add new recipients, insert the email address into the email field. Click Add after each line.

ADDITIONAL RECIPIENTS		EMAIL	TO	CC	BCC
<Type then tab>	⌄		Yes		

[✔ Add] [✖ Cancel] | [+ Insert] [🗑 Remove]

[Merge & Send] [Cancel] | [Preview]

10 Scroll down and click in the message. Type in message "Please file claim"

SUBJECT *

Case #CASE37479: Ticket #250594 | Box damaged, missing items

☐ REQUEST READ RECEIPT

FIELD TYPE

Case ▼

INSERT FIELD

<Type then tab> ⌄

MESSAGE

Source # | ✂ ▢ ▤ ▣ | ↩ ↪ | 🔍 ᵇₐ | **B** *I* U S x₂ x²

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Styles ▾ | Format ▾ | Font ▾ | Size ▾ | A ▾ A ▾ | ⛶ ⬚

Good morning/afternoon,

|

Please file claim

11   Click this "Merge & Send"

Email Message

Merge & Send   Cancel | Preview

FOR MORE INFORMATION ON HOW REPLIES TO THIS EMAIL MESSAGE CAN BE RECEIVED AND SAVED, CLICK HERE.

Recipients   **Message**   **Attachments**

SENDER ADDRESS

⦿ SW CORP <NO_REPLY@SWCORP.COM>

◯ ADRIA BETHEL <ABETHEL@SWCORP.COM>

TEMPLATE CATEGORY

- All -   ▼

TEMPLATE

▼   ☐ UPDATE

SUBJECT *

Case #CASE37479: Ticket #250594 | Box damaged, missing items

☐ REQUEST READ RECEIPT

FIELD TYPE   INSERT FIELD

Case   ▼   <Type then tab>   ⩒

MESSAGE