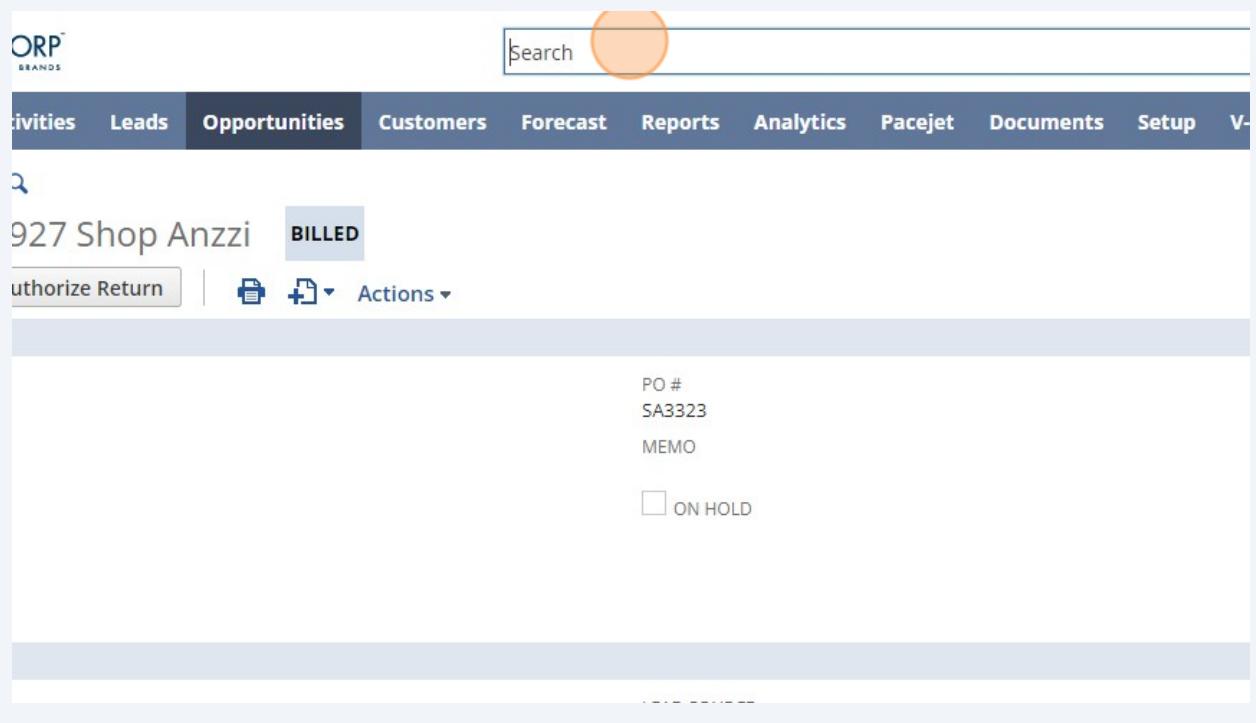


# Creating a Case in Netsuite Through a Sales Scribe Order

1 Copy the order number or sales order provided

2 Go to Netsuite and paste it in the "Search" field.



3 Select the sales order



SOS2839440

Task: RMA48122 & SOS2839440 - call tag needed

Sales Order: SOS2839440 / SA3323 (15927 Shop Anzzi) Edit

Shop Anzzi BILLED

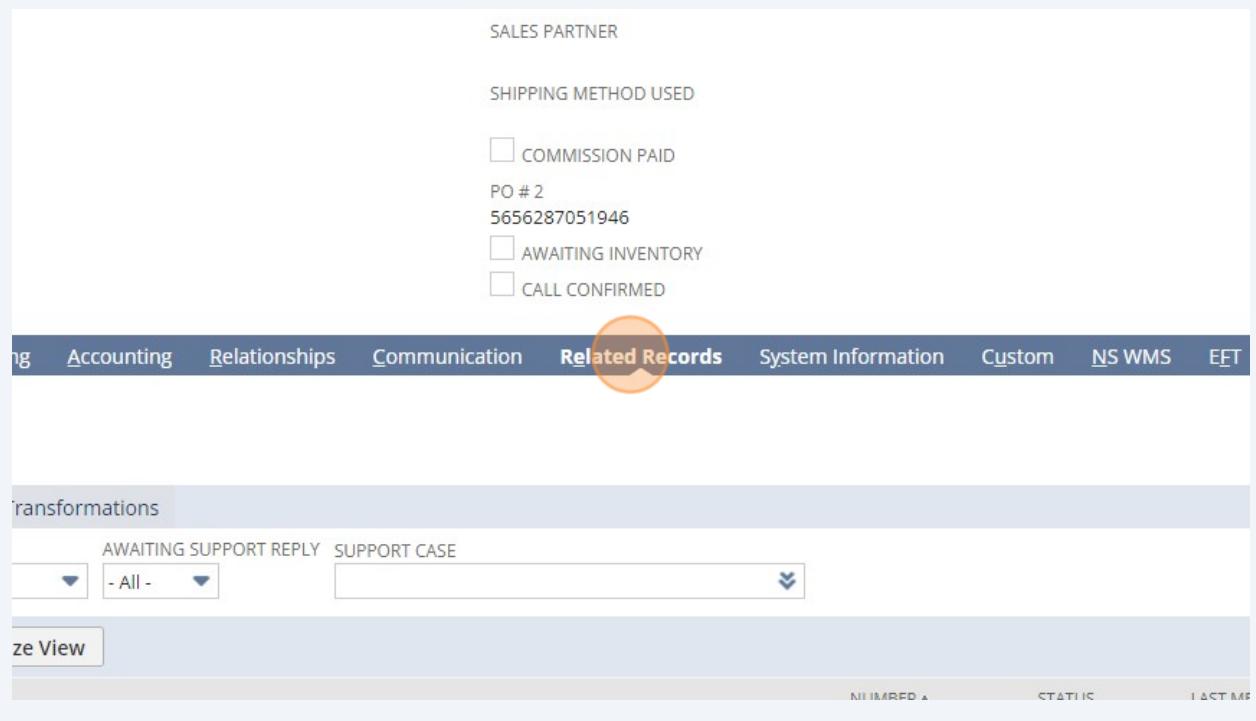
ze Return | Actions ▾

PO #  
SA3323

MEMO

ON HOLD

4 Scroll down and click "Related Records"



SALES PARTNER

SHIPPING METHOD USED

COMMISSION PAID

PO # 2  
5656287051946

AWAITING INVENTORY

CALL CONFIRMED

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

Transformations

AWAITING SUPPORT REPLY SUPPORT CASE

- All -

ze View

IMMEDIATE STATIC DRAFT

5 Click "Support Cases"

REASON FOR RETURN  
PO # 2  
5656287051946  
 AWAITING INVENTORY  
 CALL CONFIRMED

RETURN LABEL REQUEST

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

SOLE CUSTOM CREATED WORK ORDERS

DATE	TYPE	NUMBER
1/19/2024	Return Authorization	RMA48122
12/14/2023	Cash Sale	CSS48790
12/15/2023	Wave	5892
12/15/2023	Item Fulfillment	IF355611

6 Click New Case

REASON FOR RETURN  
5656287051946  
 AWAITING INVENTORY  
 CALL CONFIRMED

RETURN LABEL REQUEST

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

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  
Edit cx would like to return the products as they won't fit & item looks cheap & flimsy

Edit Back Authorize Return Actions

7 Go to contact channel and select how customer contacted us. If a call select "Inbound"

Case

Save Cancel

Disposition Information

CONTACT CHANNEL *	CONTACT REASON *	PRODUCT *
Inbound		
Outbound		
E-mail		
Chat		
Social Media		
Other		
SUBJECT *	CONTACT	PHONE
	<Type then tab>	(844) 442-6994
SUBSIDIARY	EMAIL(S)	STATUS *
Spa World Corporation	arcs@swcorp.com	Not Started
		PRIORITY
		Medium
		QUICK NOTE

8 Go to Contact Reason and select the reason customer contacted

Case

Save Cancel

Disposition Information

CONTACT CHANNEL *	CONTACT REASON *	PRODUCT *
Inbound	Sales Opportunity	
CUSTOMER *	Order Status	
15927 Shop Anzzi	Trouble Shoot	
Primary Information	Repair	
NUMBER	Cancel Order	
To Be Generated	Returns	
CUSTOM FORM *		
Spa World - Case Form		
SUBJECT *	CONTACT	PHONE
	<Type then tab>	(844) 442-6994
SUBSIDIARY	EMAIL(S)	STATUS *
Spa World Corporation	arcs@swcorp.com	Not Started
		PRIORITY
		Medium
		QUICK NOTE

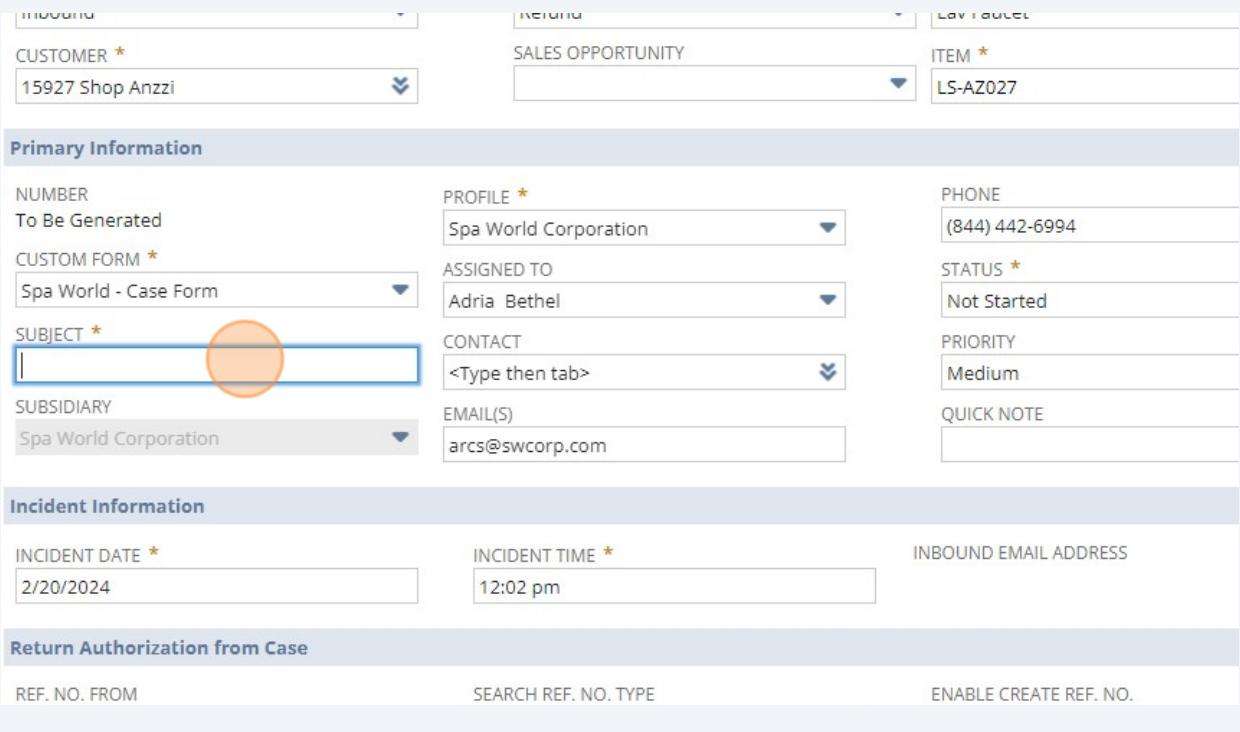
9 Go to Product drop down and select the type of item

The screenshot shows a software interface with various input fields and dropdown menus. On the right side, there is a 'PRODUCT \*' dropdown menu with a blue border and a list of items: Accessory, Bathtub, Cabinet/Storage, Drop-In Tub, Free Standing Faucet, and Free Standing Tub. The 'Accessory' option is highlighted. An orange circle is drawn around the top-left corner of the dropdown menu. To the right of the dropdown, there is a 'PART' label and a text input field with placeholder text: '<Type then tab>'. The rest of the interface includes fields for 'CONTACT REASON \*' (Refund), 'SALES OPPORTUNITY' (empty), 'PROFILE \*' (Spa World Corporation), 'ASSIGNED TO' (Adria Bethel), 'CONTACT' (empty), 'EMAIL(S)' (arcs@swcorp.com), 'PRIORITY' (Medium), and 'QUICK NOTE' (empty).

10 Go to item and input the SKU from customer's order

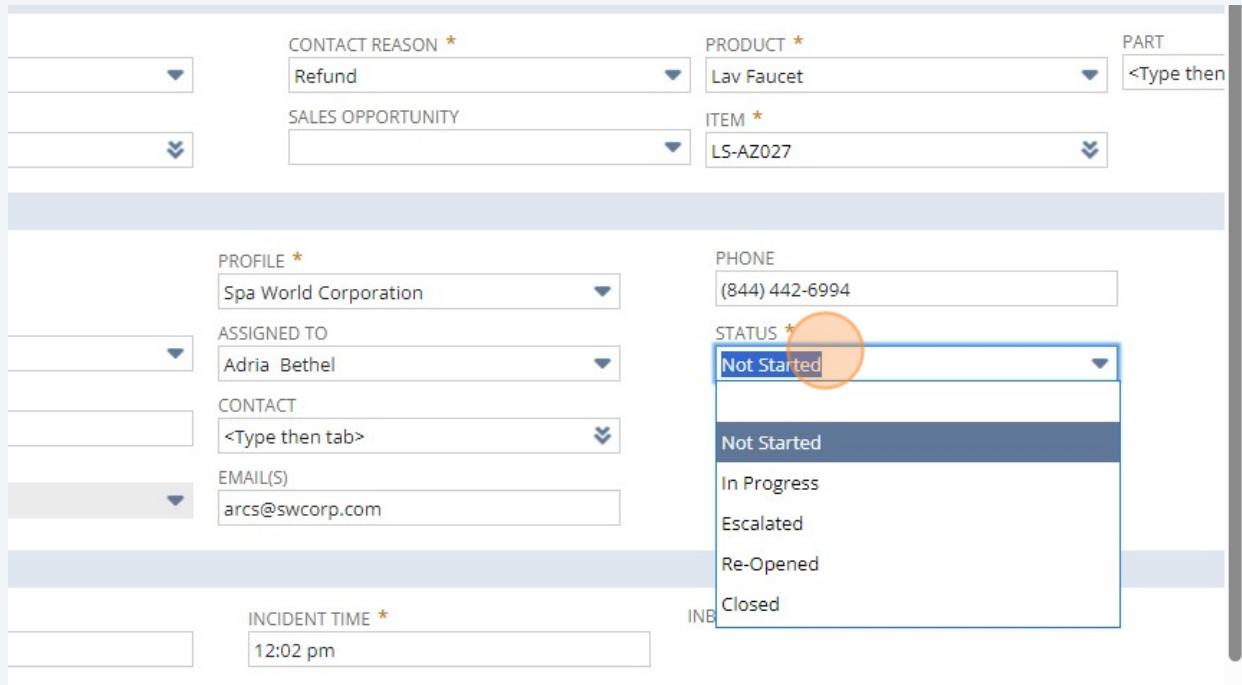
The screenshot shows a software interface with various input fields and dropdown menus. On the right side, there is an 'ITEM \*' dropdown menu with a blue border and a list of items: Lav Faucet. An orange circle is drawn around the top-left corner of the dropdown menu. To the right of the dropdown, there is a 'PART' label and a text input field with placeholder text: '<Type then tab>'. The rest of the interface includes fields for 'CONTACT REASON \*' (Refund), 'SALES OPPORTUNITY' (empty), 'PROFILE \*' (Spa World Corporation), 'ASSIGNED TO' (Adria Bethel), 'CONTACT' (empty), 'EMAIL(S)' (arcs@swcorp.com), 'PHONE' ((844) 442-6994), 'STATUS \*' (Not Started), 'PRIORITY' (Medium), and 'QUICK NOTE' (empty).

## 11 Go to subject and input customer's issue



The screenshot shows a software interface for creating a new case. At the top, there are three dropdown menus: 'INBOUND', 'RETURN', and 'LAV FAUCET'. Below these are three input fields: 'CUSTOMER \*' (15927 Shop Anzzi), 'SALES OPPORTUNITY' (empty), and 'ITEM \*' (LS-AZ027). The main area is divided into sections: 'Primary Information' and 'Incident Information'. In the 'Primary Information' section, there are fields for 'NUMBER' (To Be Generated), 'PROFILE \*' (Spa World Corporation), 'PHONE' ((844) 442-6994), 'CUSTOM FORM \*' (Spa World - Case Form), 'ASSIGNED TO' (Adria Bethel), 'STATUS \*' (Not Started), 'SUBSIDIARY' (Spa World Corporation), 'CONTACT' (<Type then tab>), 'PRIORITY' (Medium), 'EMAIL(S)' (arcs@swcorp.com), and 'QUICK NOTE' (empty). In the 'Incident Information' section, there are fields for 'INCIDENT DATE \*' (2/20/2024) and 'INCIDENT TIME \*' (12:02 pm). Below these, there is a section for 'Return Authorization from Case' with fields for 'REF. NO. FROM', 'SEARCH REF. NO. TYPE', and 'ENABLE CREATE REF. NO.'

## 12 Go to status and select In progress. Once issue is resolved you can close case



The screenshot shows the same software interface as the previous one, but with the 'STATUS' dropdown menu open. The menu options are: Not Started (highlighted with an orange circle), Not Started, In Progress, Escalated, Re-Opened, and Closed. The rest of the interface remains the same, including the 'CONTACT REASON \*' (Refund), 'PRODUCT \*' (Lav Faucet), 'PART' (<Type then tab>), 'PROFILE \*' (Spa World Corporation), 'PHONE' ((844) 442-6994), 'ASSIGNED TO' (Adria Bethel), 'CONTACT' (<Type then tab>), 'EMAIL(S)' (arcs@swcorp.com), 'INCIDENT TIME \*' (12:02 pm), and the 'INBOUND' section.

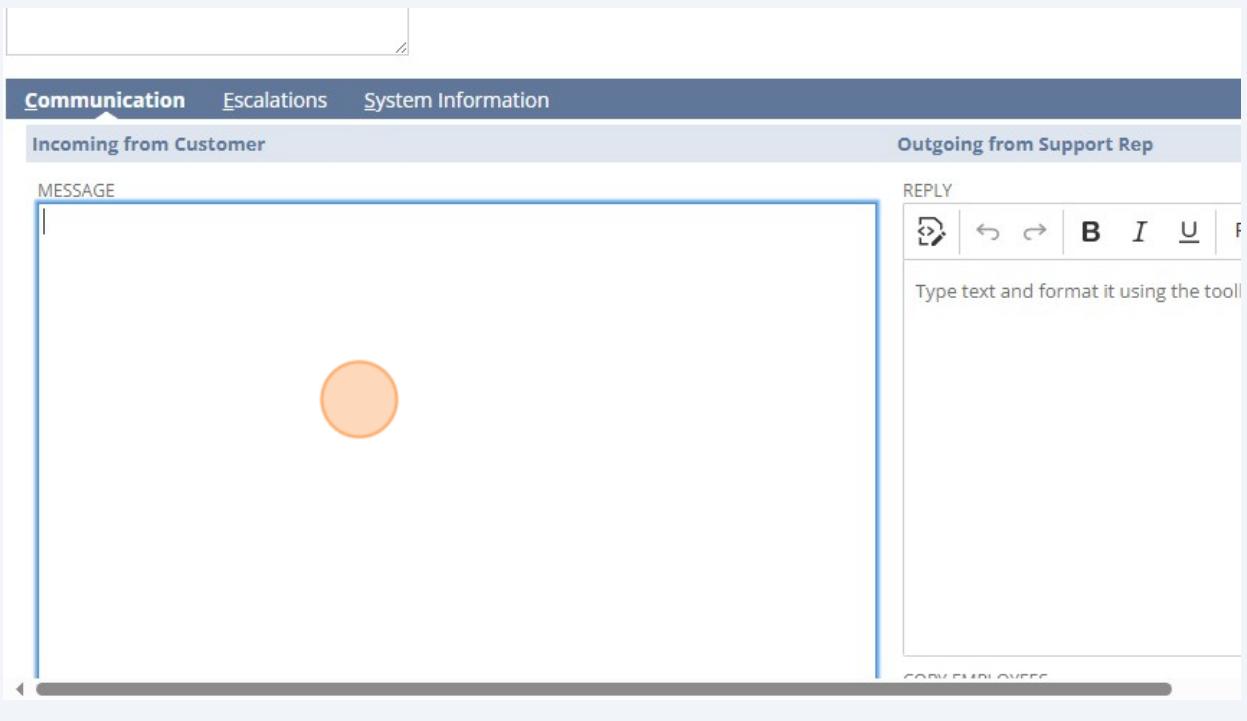
LS-AZ027

PROFILE *	PHONE
Spa World Corporation	(844) 442-6994
ASSIGNED TO	STATUS *
Adria Bethel	Not Started
CONTACT	Not Started
<Type then tab>	In Progress
EMAIL(S)	Escalated
arcs@swcorp.com	Re-Opened
INCIDENT TIME *	Closed
12:02 pm	INB
From Case	
SEARCH REF. NO. TYPE	ENABLE CREATE REF. NO.
Sales Order	

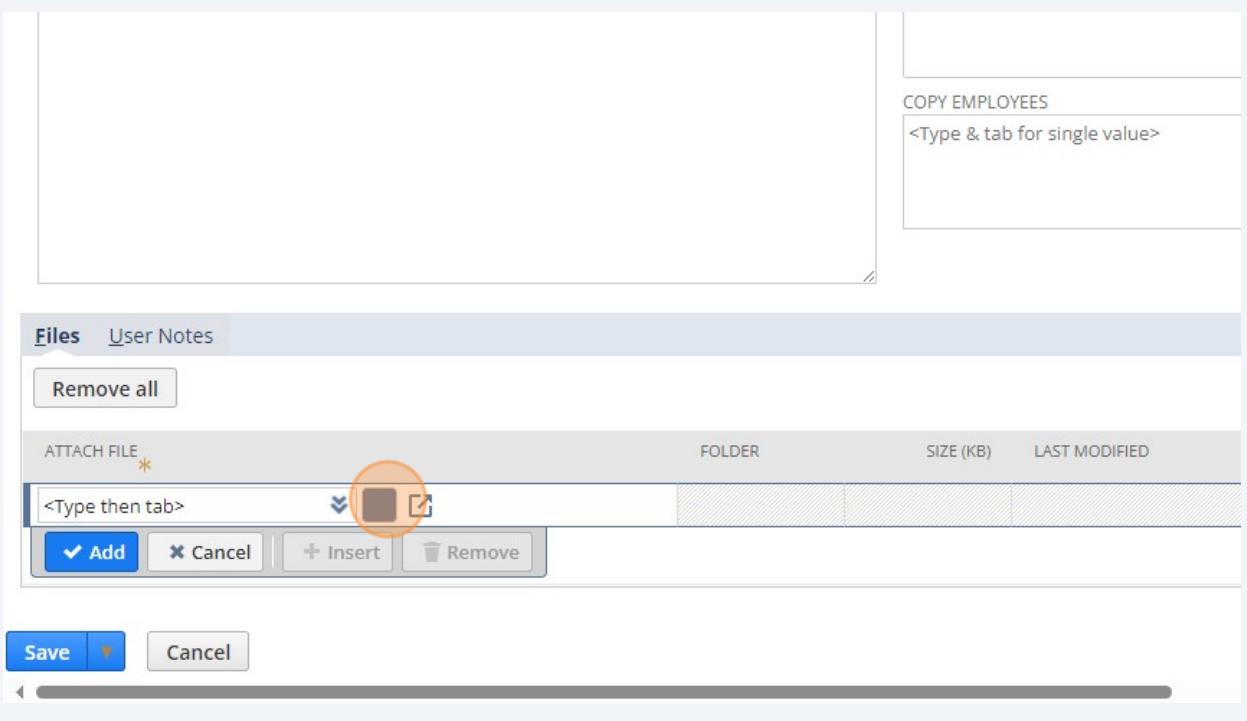
### 13 Go down to description and type the issue

2/20/2024	12:02 pm	
Return Authorization from Case		
REF. NO. FROM	SEARCH REF. NO. TYPE	ENABLE CREATE REF. NO.
11/23/2023	Sales Order	
REF. NO. TO	SEARCH REFERENCE NUMBER	
2/20/2024	<Type then tab>	
DESCRIPTION		
<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>		
<b>Communication</b> <b>Escalations</b> <b>System Information</b>		
<b>Incoming from Customer</b>		<b>Outgoing from Support Rep</b>
MESSAGE		REPLY
<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>		<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>
Type text and format it using the tools		

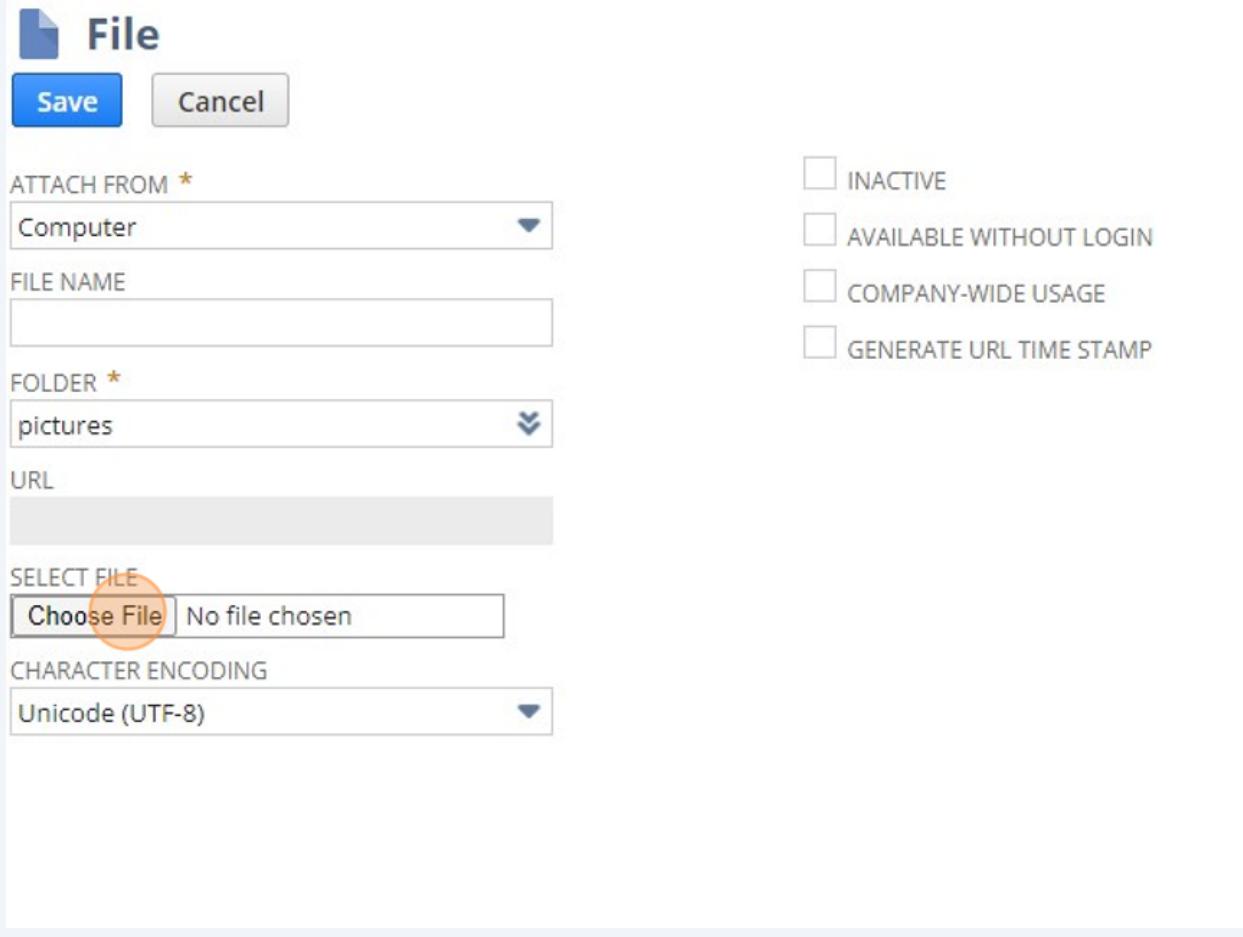
14 Go down to message and type the issue



15 Scroll down and click the "+"



16 Click choose file and select the image/s customer sent



The screenshot shows a file upload interface. At the top, there is a 'File' icon and the word 'File'. Below that are two buttons: 'Save' (in blue) and 'Cancel'. The main area has the following fields and options:

- ATTACH FROM \***: A dropdown menu set to 'Computer'.
- FILE NAME**: An empty text input field.
- FOLDER \***: A dropdown menu set to 'pictures'.
- URL**: An empty text input field.
- SELECT FILE**: A section with a 'Choose File' button (which is highlighted with a red circle) and a text input field showing 'No file chosen'.
- CHARACTER ENCODING**: A dropdown menu set to 'Unicode (UTF-8)'.
- Checkboxes (on the right)**:
  - INACTIVE
  - AVAILABLE WITHOUT LOGIN
  - COMPANY-WIDE USAGE
  - GENERATE URL TIME STAMP

17 Click save

File

Save Cancel

ATTACH FROM \*

Computer

FILE NAME

FOLDER \*

pictures

URL

SELECT FILE

Choose File SA3489-5.jpeg

CHARACTER ENCODING

Unicode (UTF-8)

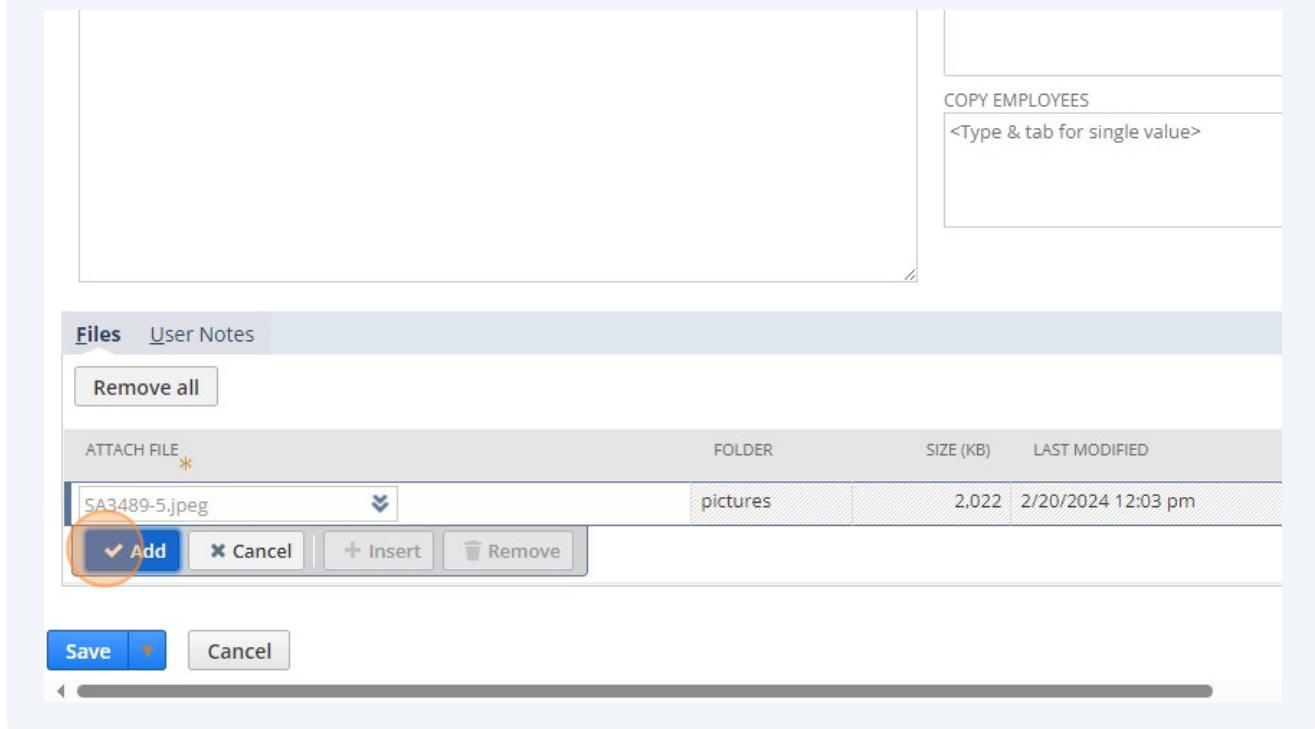
INACTIVE

AVAILABLE WITHOUT LOGIN

COMPANY-WIDE USAGE

GENERATE URL TIME STAMP

18 Click add. (Repeat steps 20-23 until all images have been added)



Files User Notes

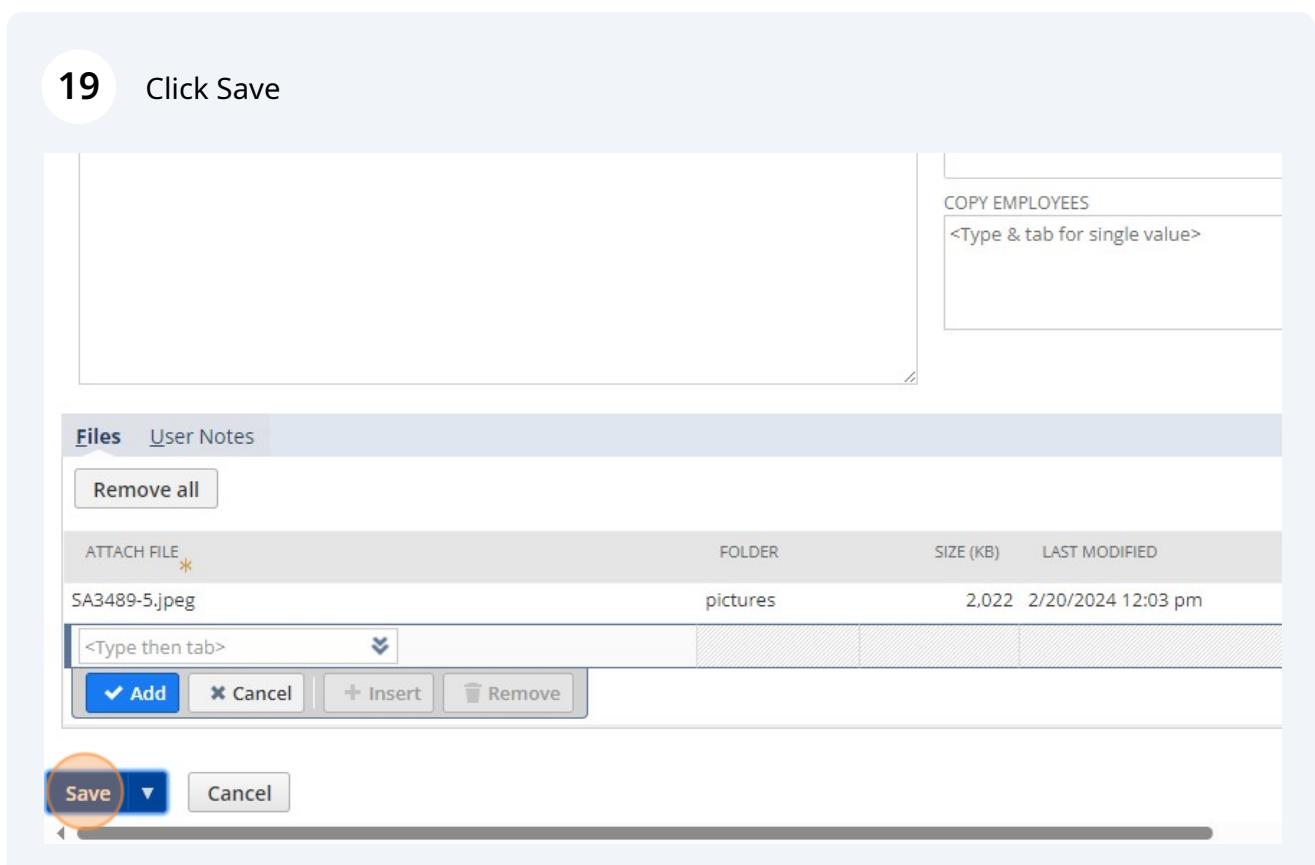
Remove all

ATTACH FILE *	FOLDER	SIZE (KB)	LAST MODIFIED
SA3489-5.jpeg	pictures	2,022	2/20/2024 12:03 pm

✓ Add   ✘ Cancel   + Insert   - Remove

Save   Cancel

19 Click Save



COPY EMPLOYEES  
<Type & tab for single value>

Files User Notes

Remove all

ATTACH FILE *	FOLDER	SIZE (KB)	LAST MODIFIED
SA3489-5.jpeg	pictures	2,022	2/20/2024 12:03 pm

<Type then tab>

✓ Add   ✘ Cancel   + Insert   - Remove

Save   Cancel