Creating a Case in Netsuite Through a Sales Order

1 Copy the order number or sales order provided

2 Go to Netsuite and paste it in the "Search" field.
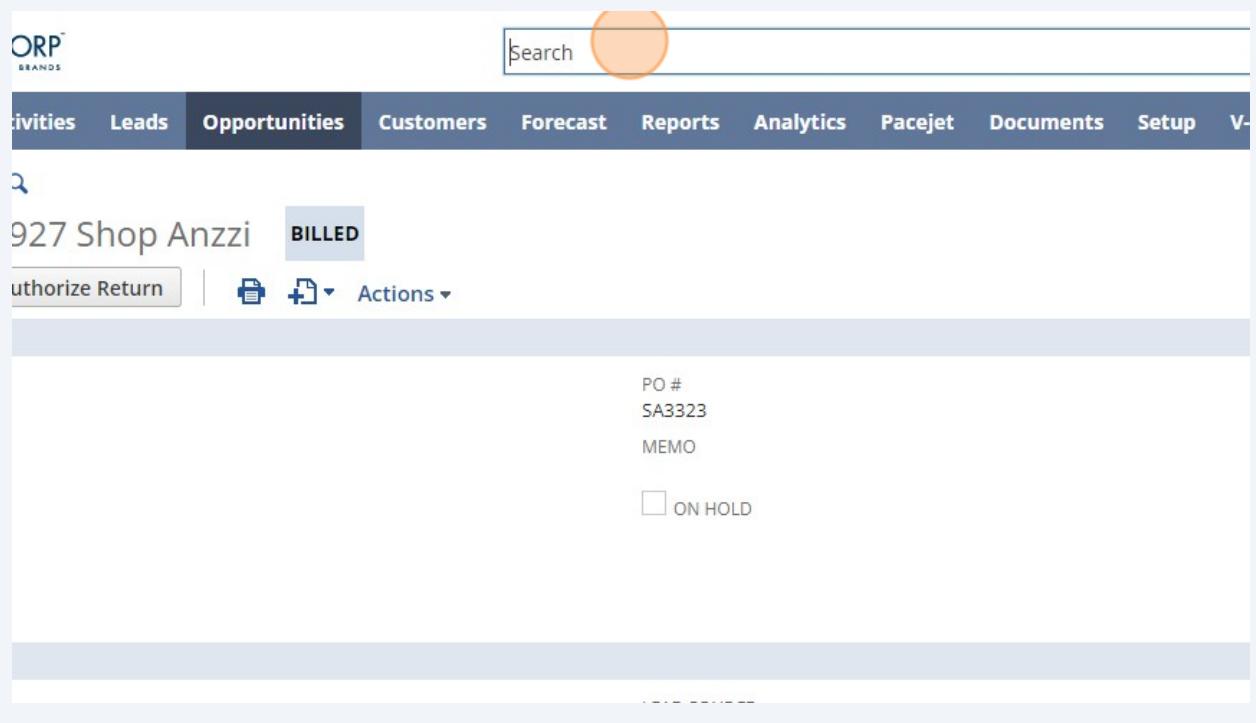
3 Select the sales order

SOS2839440

Leads **Opportunities** Customers

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"
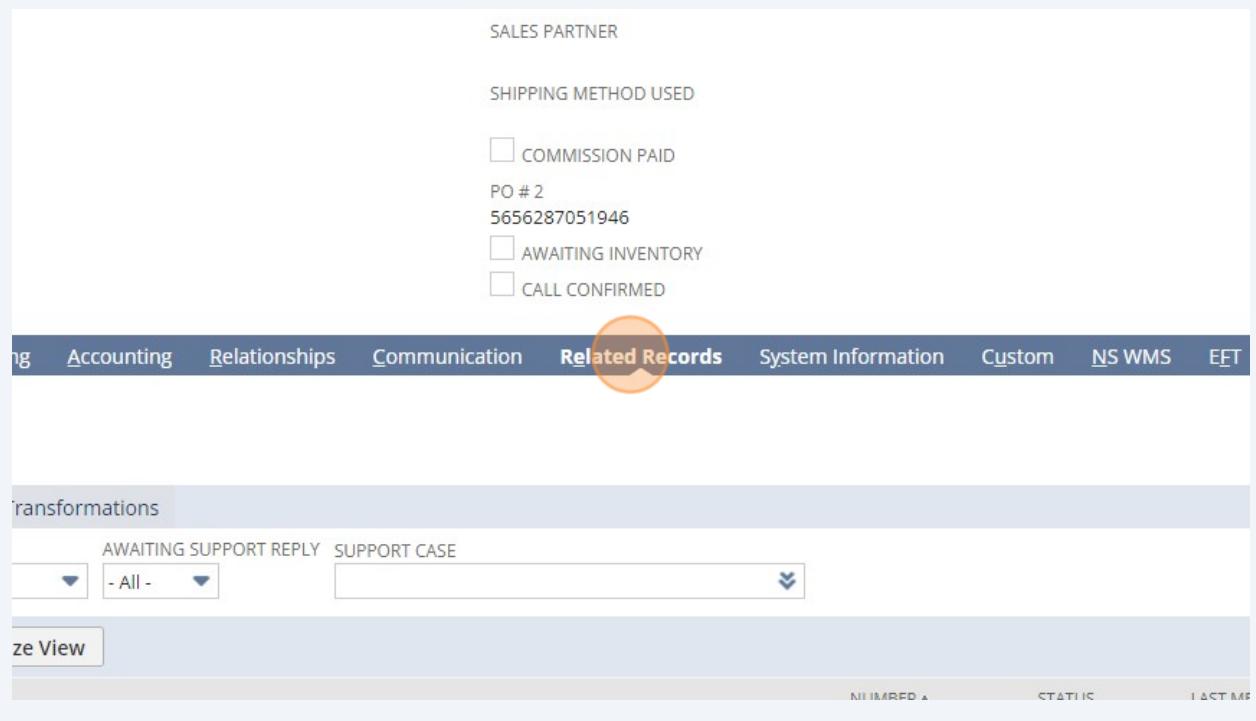
SALES PARTNER

SHIPPING METHOD USED

☐ COMMISSION PAID

PO # 2
5656287051946

☐ AWAITING INVENTORY

☐ CALL CONFIRMED

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

ransformations

AWAITING SUPPORT REPLY   SUPPORT CASE

▾   - All -   ▾   ⇲

ze View

NUMBER ▲   STATUS   LAST M

5 Click "Support Cases"

REASON FOR RETURN

RETURN LABEL REQUEST

PO # 2
5656287051946
☐ AWAITING INVENTORY
☐ 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
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

RETURN LABEL REQUEST

5656287051946
☐ 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
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 *
▾

| Inbound |
| Outbound |
| E-mail |
| Chat |
| Social Media |
| Other |

CONTACT REASON *
▾

SALES OPPORTUNITY
▾

PRODUCT *

ITEM *
<Type then tab>

PROFILE *
Spa World Corporation ▾

PHONE
(844) 442-6994

ASSIGNED TO
Adria Bethel ▾

STATUS *
Not Started

SUBJECT *

CONTACT
<Type then tab> ⇟

PRIORITY
Medium

SUBSIDIARY
Spa World Corporation ▾

EMAIL(S)
arcs@swcorp.com

QUICK NOTE

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8   Go to Contact Reason and select the reason customer contacted

Case

Save ▾   Cancel

Disposition Information

CONTACT CHANNEL *
Inbound ▾

CUSTOMER *
15927 Shop Anzzi ⇟

CONTACT REASON *

| Sales Opportunity |
| Order Status |
| Trouble Shoot |
| Repair |
| Cancel Order |
| Returns |

PRODUCT *

ITEM *
<Type then tab>

Primary Information

NUMBER
To Be Generated

CUSTOM FORM *
Spa World - Case Form ▾

SUBJECT *

SUBSIDIARY
Spa World Corporation ▾

PROFILE
Spa Wo

ASSIGNE
Adria B

CONTACT
<Type then tab> ⇟

EMAIL(S)
arcs@swcorp.com

PHONE
(844) 442-6994

STATUS *
Not Started

PRIORITY
Medium

QUICK NOTE

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

CONTACT REASON *	PRODUCT *	PART
Refund		<Type then

SALES OPPORTUNITY

Accessory
Bathtub
Cabinet/Storage
Drop-In Tub
Free Standing Faucet
Free Standing Tub

PROFILE *
Spa World Corporation

ASSIGNED TO
Adria Bethel

CONTACT
<Type then tab>

PRIORITY
Medium

EMAIL(S)
arcs@swcorp.com

QUICK NOTE

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

CONTACT REASON *	PRODUCT *	PART
Refund	Lav Faucet	<Type then

SALES OPPORTUNITY

ITEM *

PROFILE *
Spa World Corporation

PHONE
(844) 442-6994

ASSIGNED TO
Adria Bethel

STATUS *
Not Started

CONTACT
<Type then tab>

PRIORITY
Medium

EMAIL(S)
arcs@swcorp.com

QUICK NOTE

11   Go to subject and input customer's issue

Inbound ▾   Refund ▾   Lav Faucet

CUSTOMER *   SALES OPPORTUNITY   ITEM *
15927 Shop Anzzi   ⌄   ▾   LS-AZ027

Primary Information

NUMBER   PROFILE *   PHONE
To Be Generated   Spa World Corporation   ▾   (844) 442-6994

CUSTOM FORM *   ASSIGNED TO   STATUS *
Spa World - Case Form ▾   Adria Bethel   ▾   Not Started

SUBJECT *   CONTACT   PRIORITY
[   ]   <Type then tab>   ⌄   Medium

SUBSIDIARY   EMAIL(S)   QUICK NOTE
Spa World Corporation ▾   arcs@swcorp.com   [   ]

Incident Information

INCIDENT DATE *   INCIDENT TIME *   INBOUND EMAIL ADDRESS
2/20/2024   12:02 pm

Return Authorization from Case

REF. NO. FROM   SEARCH REF. NO. TYPE   ENABLE CREATE REF. NO.

---

12   Go to status and select In progress. Once issue is resolved you can close case
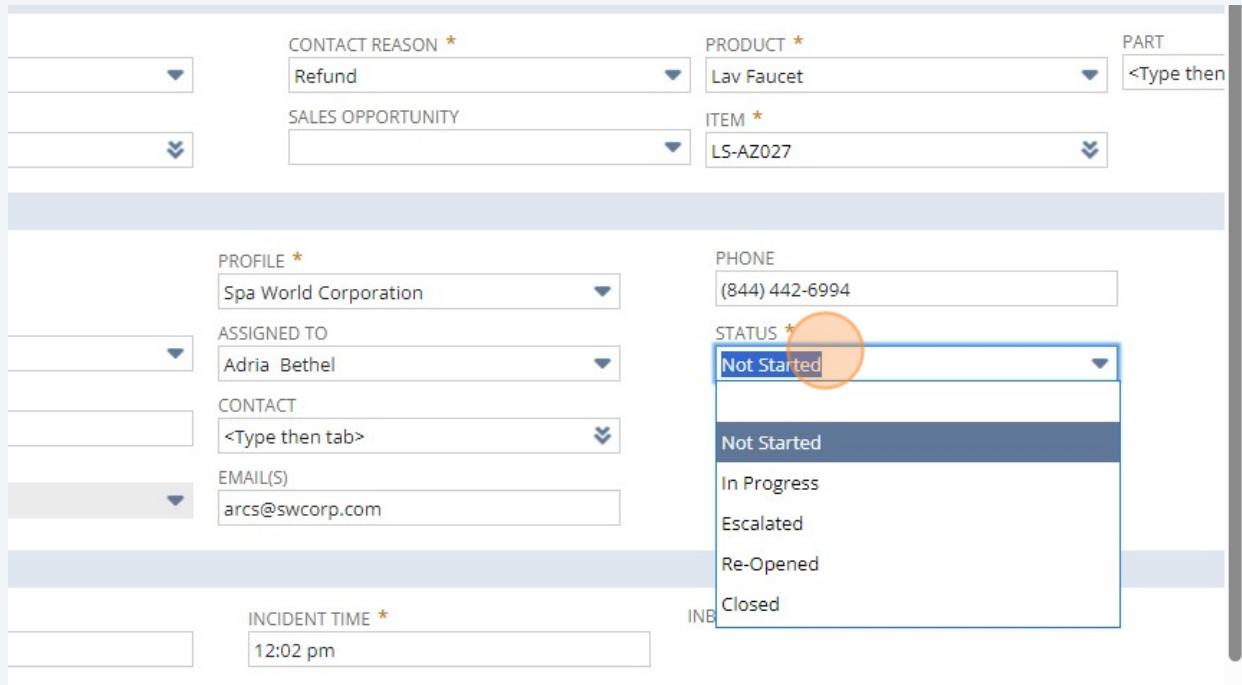
                             CONTACT REASON *   PRODUCT *   PART
          ▾   Refund   ▾   Lav Faucet   ▾   <Type then

          ⌄   SALES OPPORTUNITY   ITEM *
                                                     ▾   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
                                                              Closed

                             INCIDENT TIME *   INB
                             12:02 pm

PROFILE *
Spa World Corporation ▼

PHONE
(844) 442-6994

ASSIGNED TO
Adria Bethel ▼

STATUS *
Not Started ▼

Not Started
In Progress
Escalated
Re-Opened
Closed

CONTACT
<Type then tab> ⌄

EMAIL(S)
arcs@swcorp.com

INCIDENT TIME *
12:02 pm

INB

om Case

SEARCH REF. NO. TYPE
Sales Order ▼

ENABLE CREATE REF. NO.
▼

SEARCH REFERENCE NUMBER

LS-AZ027 ⌄

---

13   Go down to description and type the issue

2/20/2024

12:02 pm

Return Authorization from Case

REF. NO. FROM
11/23/2023

SEARCH REF. NO. TYPE
Sales Order ▼

ENABLE CREATE REF. NO.

REF. NO. TO
2/20/2024

SEARCH REFERENCE NUMBER
<Type then tab> ⌄

DESCRIPTION

Communication   Escalations   System Information

Incoming from Customer

MESSAGE

Outgoing from Support Rep

REPLY

〈⁄〉 ↶ ↷   **B** *I* U̲ F

Type text and format it using the tool

14 Go down to message and type the issue

Communication   Escalations   System Information

Incoming from Customer   **Outgoing from Support Rep**

MESSAGE   REPLY

Type text and format it using the tool

---

15 Scroll down and click the "+"

COPY EMPLOYEES
<Type & tab for single value>

Files   User Notes

Remove all

ATTACH FILE   FOLDER   SIZE (KB)   LAST MODIFIED

<Type then tab>

✔ Add   ✖ Cancel   + Insert   🗑 Remove

Save ▾   Cancel
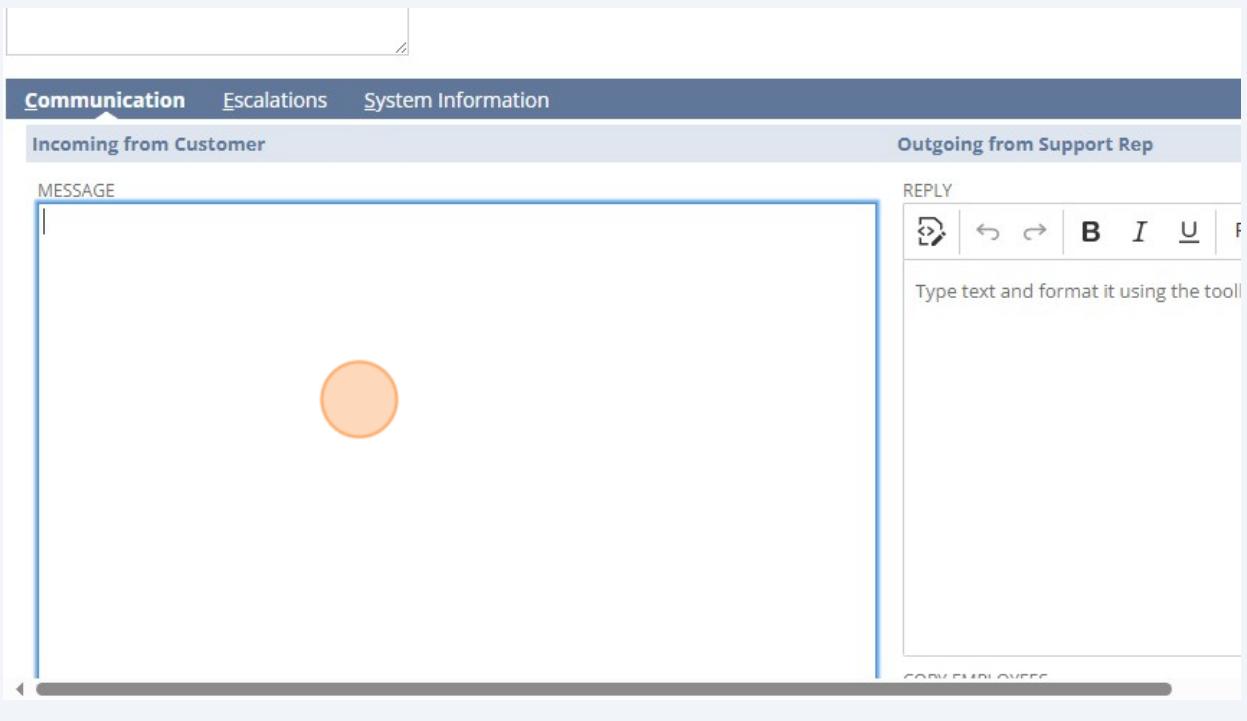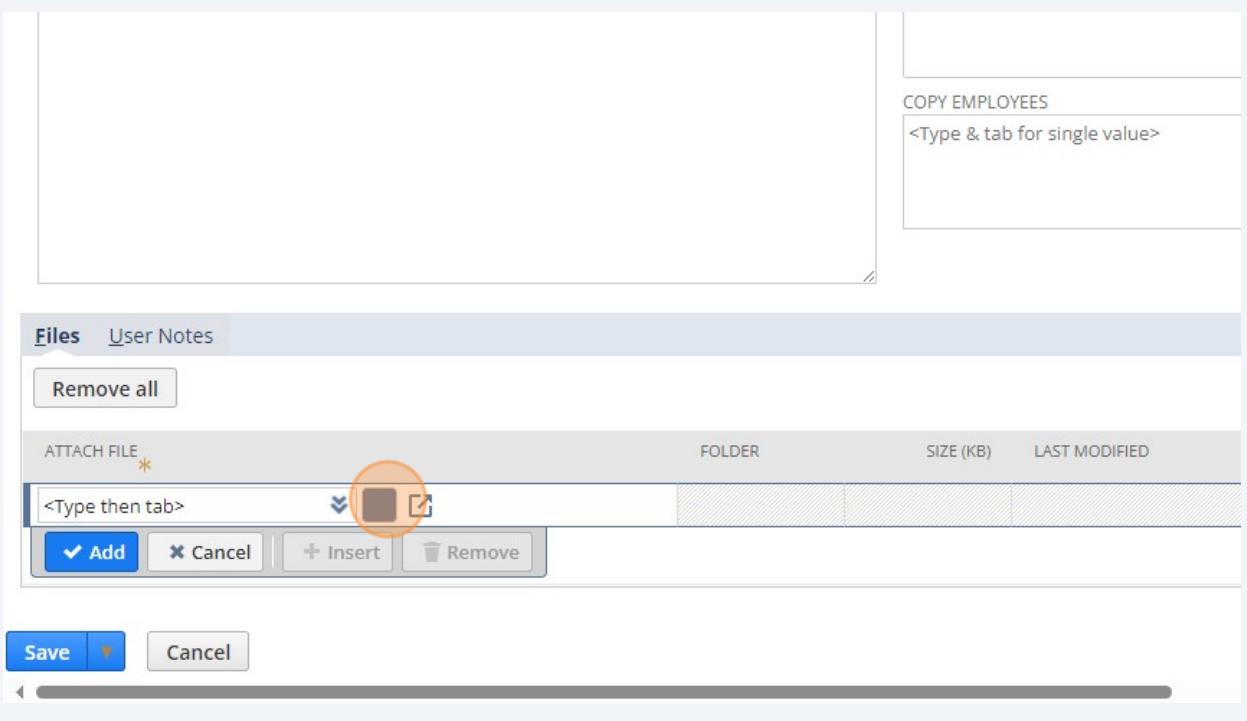
16 Click choose file and select the image/s customer sent
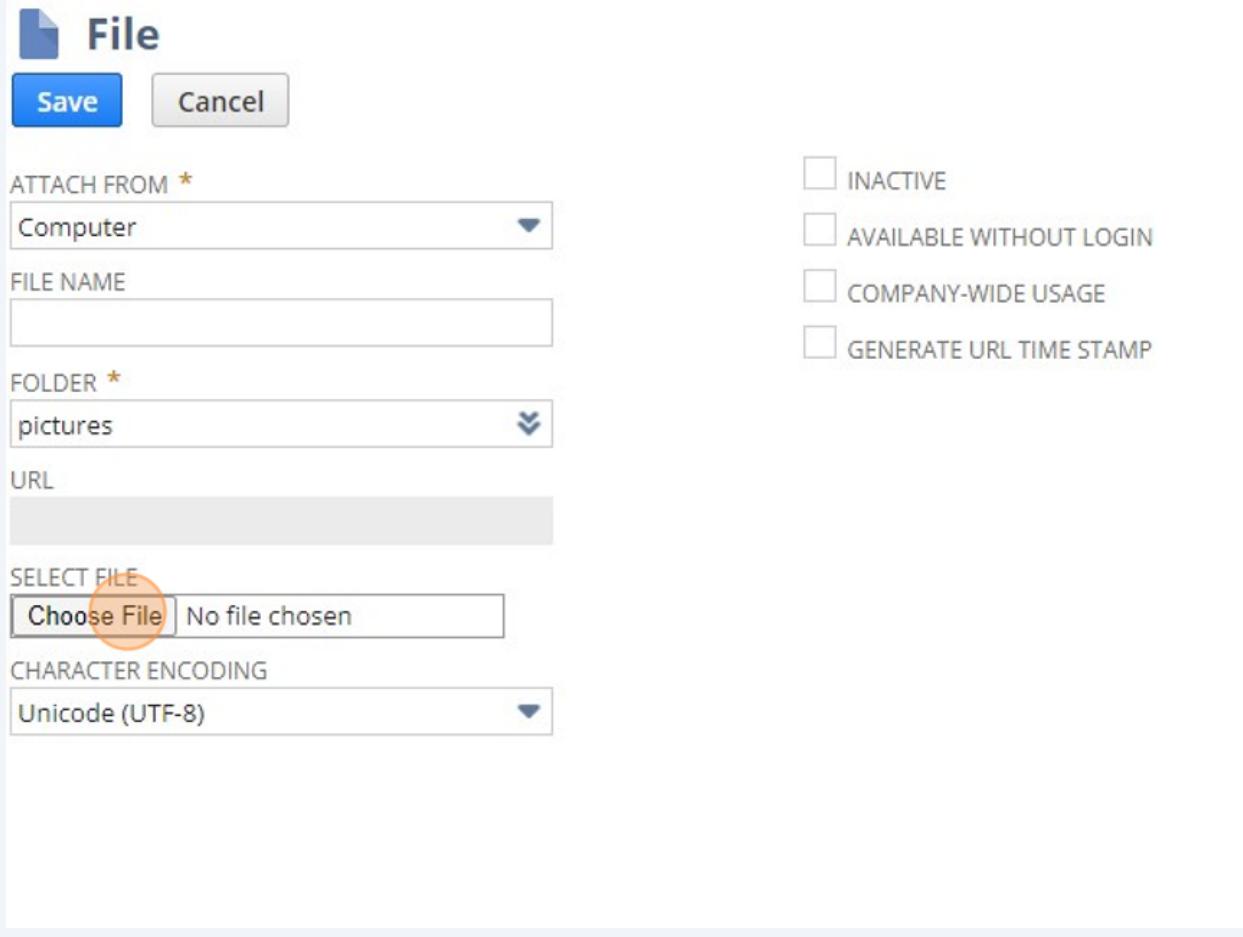
File

Save   Cancel

ATTACH FROM *

Computer

FILE NAME

FOLDER *

pictures

URL

SELECT FILE

Choose File   No file chosen

CHARACTER ENCODING

Unicode (UTF-8)

☐ 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
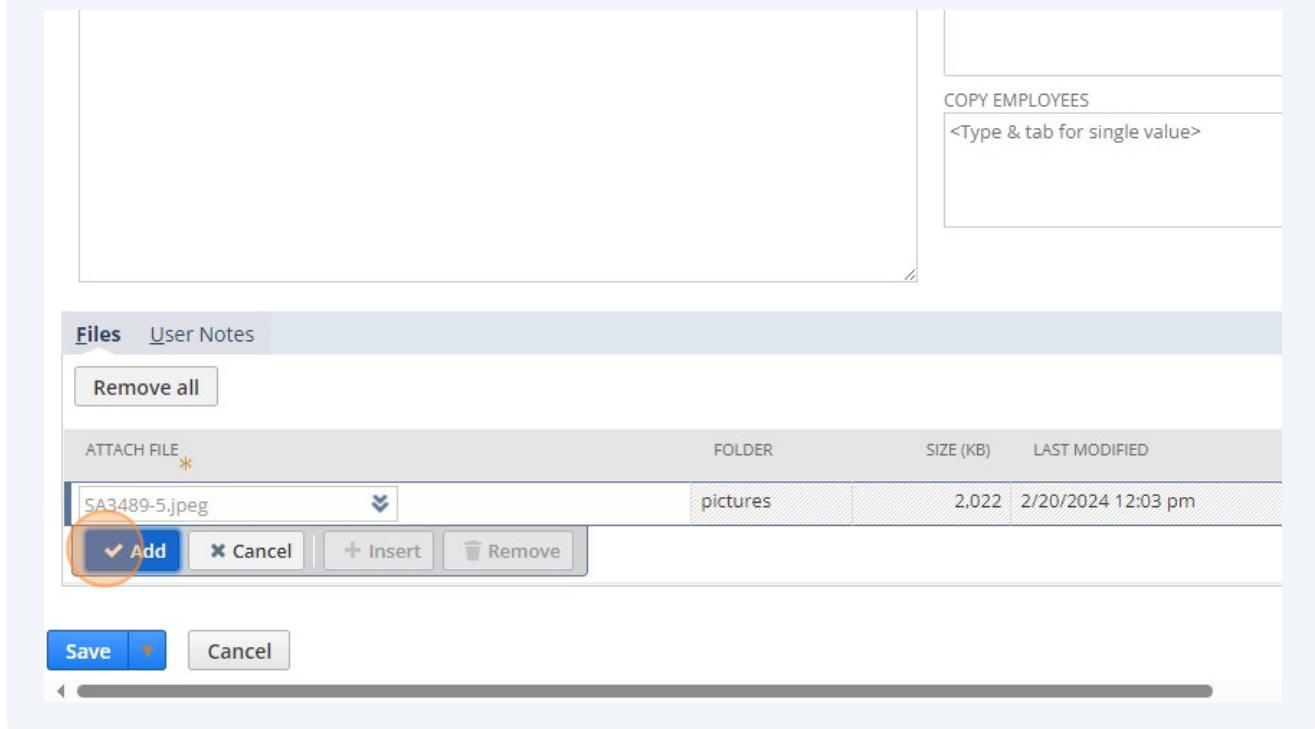
COPY EMPLOYEES

<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

✔ 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