

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.

The screenshot displays the NetSuite user interface. At the top, the 'ORP BRANDS' logo is on the left, and a search bar with the placeholder text 'Search' is on the right, highlighted with an orange circle. Below the logo, a navigation bar contains tabs for 'Activities', 'Leads', 'Opportunities', 'Customers', 'Forecast', 'Reports', 'Analytics', 'Pacejet', 'Documents', 'Setup', and 'V-'. The 'Opportunities' tab is currently selected. Below the navigation bar, the main content area shows a search result for '927 Shop Anzzi'. To the right of the name is a blue 'BILLED' status tag. Below the name, there is a button labeled 'Authorize Return' and a set of icons including a printer, a plus sign, and a dropdown arrow, followed by the text 'Actions'. The main content area also displays the following details: 'PO # SA3323', 'MEMO', and a checkbox labeled 'ON HOLD'.

3 Select the sales order

SOS2839440

Task: RMA48122 & SOS2839440 - call tag needed

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

Shop Anzzi **BILLED**

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

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

transformations

AWAITING SUPPORT REPLY SUPPORT CASE

- All -

Support Case

Size View

NUMBER 1 STATIC 1 & 2 MP

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** System

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** System

SOLE CUSTOM CREATED WORK ORDERS

Related Records • **Support Cases** • Transformations

VIEW: Case Default STAGE: - All - AWAITING SUPPORT REPLY: - All - SUPPORT CASE:

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

CONTACT REASON *
SALES OPPORTUNITY

PRODUCT *
ITEM *
<Type then tab>

PROFILE *
Spa World Corporation

ASSIGNED TO
Adria Bethel

PHONE
(844) 442-6994

STATUS *
Not Started

PRIORITY
Medium

QUICK NOTE

SUBJECT *
SUBSIDIARY
Spa World Corporation

CONTACT
<Type then tab>

EMAIL(S)
arcs@swcorp.com

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

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

ASSIGNED TO
Adria E

PHONE
(844) 442-6994

STATUS *
Not Started

PRIORITY
Medium

QUICK NOTE

CONTACT
<Type then tab>

EMAIL(S)
arcs@swcorp.com

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

A screenshot of a web form with a light blue header and a white body. The form contains several fields: CONTACT REASON (Refund), SALES OPPORTUNITY, PROFILE (Spa World Corporation), ASSIGNED TO (Adria Bethel), CONTACT (<Type then tab>), EMAIL(S) (arcs@swcorp.com), PRODUCT (open dropdown menu), PART (<Type then tab>), PRIORITY (Medium), and QUICK NOTE. The PRODUCT dropdown menu is open, showing a list of items: Accessory, Bathtub, Cabinet/Storage, Drop-In Tub, Free Standing Faucet, and Free Standing Tub. An orange circle highlights the top of the dropdown menu.

	CONTACT REASON *	PRODUCT *	PART
	Refund		<Type then tab>
	SALES OPPORTUNITY		
	PROFILE *		
	Spa World Corporation		
	ASSIGNED TO		
	Adria Bethel		
	CONTACT		
	<Type then tab>		
	EMAIL(S)		
	arcs@swcorp.com		
		PRIORITY	
		Medium	
		QUICK NOTE	

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

A screenshot of a web form similar to the one above. The PRODUCT field now contains 'Lav Faucet'. The ITEM dropdown menu is open, showing a list of items. An orange circle highlights the top of the dropdown menu. The other fields remain the same: CONTACT REASON (Refund), SALES OPPORTUNITY, PROFILE (Spa World Corporation), ASSIGNED TO (Adria Bethel), CONTACT (<Type then tab>), EMAIL(S) (arcs@swcorp.com), PRIORITY (Medium), and QUICK NOTE. The PART field is still <Type then tab>.

	CONTACT REASON *	PRODUCT *	PART
	Refund	Lav Faucet	<Type then tab>
	SALES OPPORTUNITY		
	PROFILE *		
	Spa World Corporation		
	ASSIGNED TO		
	Adria Bethel		
	CONTACT		
	<Type then tab>		
	EMAIL(S)		
	arcs@swcorp.com		
		PHONE	
		(844) 442-6994	
		STATUS *	
		Not Started	
		PRIORITY	
		Medium	
		QUICK NOTE	

11 Go to subject and input customer's issue

INCIDENT	RETURN	LAV FAUCET
CUSTOMER *	SALES OPPORTUNITY	ITEM *
15927 Shop Anzzi		LS-AZ027

Primary Information

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
SUBJECT * <input type="text"/>	CONTACT <Type then tab>	PRIORITY Medium
SUBSIDIARY Spa World Corporation	EMAIL(S) arcs@swcorp.com	QUICK NOTE <input type="text"/>

Incident Information

INCIDENT DATE * 2/20/2024	INCIDENT TIME * 12:02 pm	INBOUND EMAIL ADDRESS
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Return Authorization from Case

REF. NO. FROM	SEARCH REF. NO. TYPE	ENABLE CREATE REF. NO.
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12 Go to status and select In progress. Once issue is resolved you can close case

	CONTACT REASON * Refund	PRODUCT * Lav Faucet	PART <Type then
	SALES OPPORTUNITY	ITEM * LS-AZ027	

Primary Information

PROFILE * Spa World Corporation	PHONE (844) 442-6994
ASSIGNED TO Adria Bethel	STATUS * Not Started
CONTACT <Type then tab>	In Progress
EMAIL(S) arcs@swcorp.com	Escalated
	Re-Opened
	Closed

Incident Information

INCIDENT TIME * 12:02 pm	INBOUND EMAIL ADDRESS
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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)

The screenshot shows a user interface with a 'Files' tab and a 'User Notes' tab. The 'Files' tab is active, displaying a table with columns: ATTACH FILE, FOLDER, SIZE (KB), and LAST MODIFIED. The table contains one row with the file 'SA3489-5.jpeg' in the 'pictures' folder, with a size of 2,022 KB and a last modified date of 2/20/2024 12:03 pm. Below the table, there are buttons for 'Add', 'Cancel', 'Insert', and 'Remove'. The 'Add' button is circled in orange. At the bottom, there are 'Save' and 'Cancel' buttons.

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

19 Click Save

The screenshot shows the same user interface as in step 18. The 'Files' tab is active, and the table now has a second row with the placeholder text '<Type then tab>' in the 'ATTACH FILE' column. The 'Save' button at the bottom is circled in orange.

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