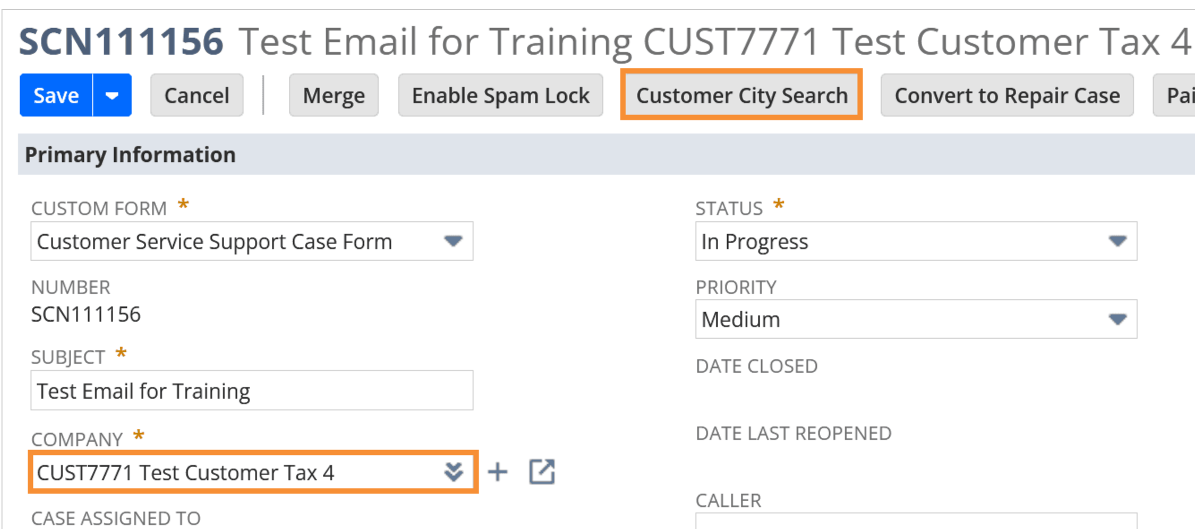
Scheduling Permanent Service from a Support Case

This guide details how to schedule a Permanent Service from a NetSuite Support Case.

Updating the Request Case

1. Sign in to NetSuite.
2. Grab the Case from your queue.
3. Verify the customer by address or store number by entering the address into the **Customer City Search** tool.



Tip

- Typically, these details are provided by the customer in the request email.
- When searching by address, remove the suffix designation (Rd., St., Dr., and so on.) to get around inconsistencies in the data entered on the Customer Record.
- You may need to respond to the customer to ask them to verify their address or store number, if not known.

4 Update the **SUBJECT** line to the request type and requested day of service to the next business day unless otherwise specified.

> **Example**
>
> *OT haul 10/17*

1 For **MAIN ISSUE** and **ISSUE DETAILS**, choose the most applicable options. See Support Case Main Issue/Issue Details Definitions for more information.

2 Go to **Communication**. Respond to customers email advising receipt.

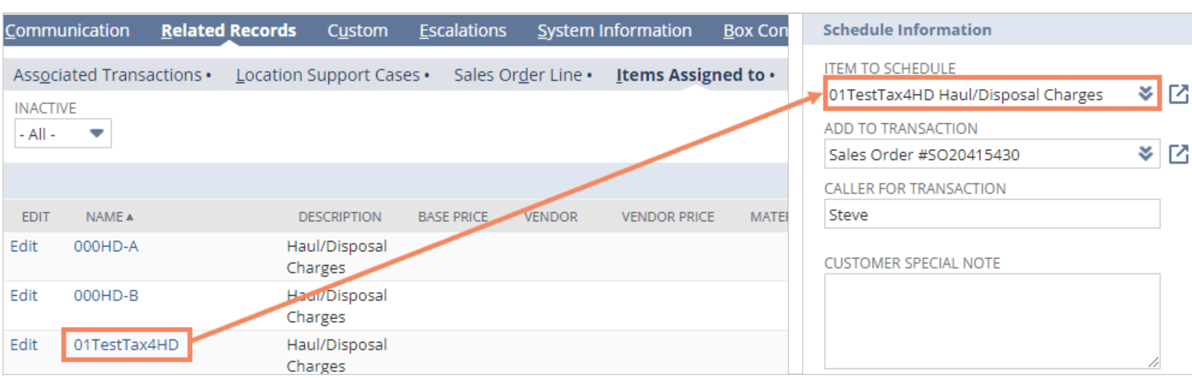
> **Note**
>
> Be sure to remove all customer `@wasteharmonics.com` or `request@newmarketwaste.com` email addresses. This will prevent another unnecessary Support Case from being created.

3 Be sure to check that the service being requested isn't already on schedule. Go to **Sales Order Line** and verify that there are no hauls already scheduled for the requested service date.

- If there are, update the customer and close the case.
- If not, then continue to the following steps.

4 Go to **Related Records** > **Item Assigned to**. Locate Item Group Code.

5 Copy Item Group Code. Paste in to **ITEM TO SCHEDULE**.



6 Copy vendor number for the requested container. Paste it in **CASE VENDOR**.

7 Go to **Communication**. Copy the time stamp of the original request. Paste it in **CALLER DATE/TIME**.

8. Update **ADD TO TRANSACTION** with the current month Sales Order #. You can find this under **Related Records** > **Sales Order Line**.

> **Note**
>
> If no current month's SO # is available, leave this field blank.

9. Update **CALLER FOR TRANSACTION** with the request name/phone #/Work Order #.

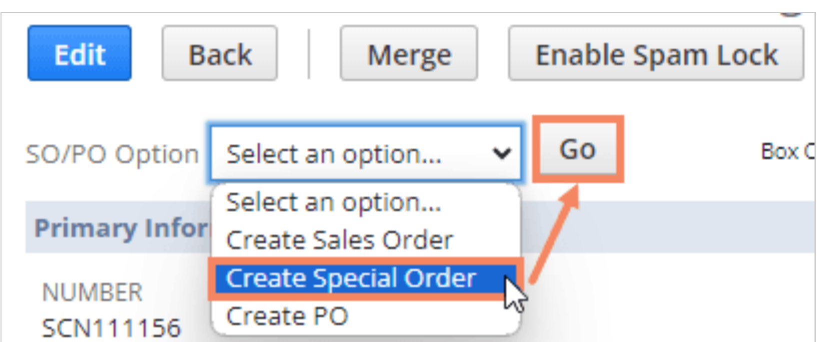
> **Example formats**
>
> - For phone: `John 585.433.4333`
> - For email: `John email`

10. Update **SERVICE DATE FOR TRANSACTION** to the next business day unless otherwise specified.

11. Select **Save**.

Creating the PO

1. For **SO/PO Option**, choose **Create Special Order**. Select **Go**. The SO opens.



> **Info**
>
> This creates a Special Order. Special Orders refer to the NetSuite action of creating both a Sales Order and Purchase Order in one go. When you create a Special Order, it uses an existing Sales Order (or creates a new one should one not exist), and then it creates a linked Purchase Order.

> **Warning**
>
> Don't select more than once. That creates multiple purchase orders that need to be canceled.

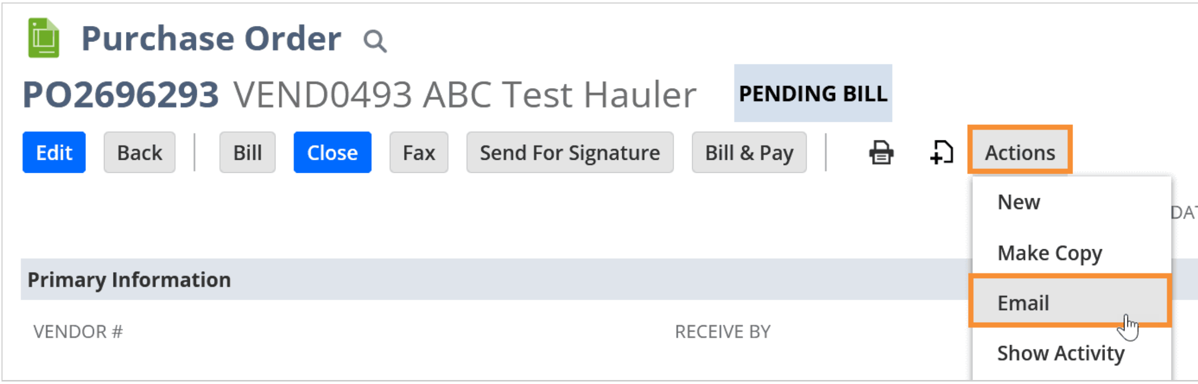
2. If creating a brand-new SO, select **Edit**. Update the **DATE** to the 1st of the month.
3. Select **Save**.
4. After saving, locate PO you created, which defaults to the bottom of the SO. Select the PO #.
5. On the PO, select **Edit**.
6. Update **DATE** to the next business day, unless otherwise specified.

> **Tip**
>
> Enter the current unformatted date (for example, `10172023`). Press `Space` + `Tab ⇥`. This autofills the formatted date and exact time.

7. Update **CALLER** to necessary identifier (`Email PO`, `WM portal`, `Gotjunk portal`/ `call in`).
8. Update the **PO CALL DATE** with current time and date.
9. Select **Save**.

Sending the PO to the Vendor

1. On the PO, hover over **Actions**. Select **Email**.



2. From **RECIPIENT**, select the necessary identifiers. Select all that apply.

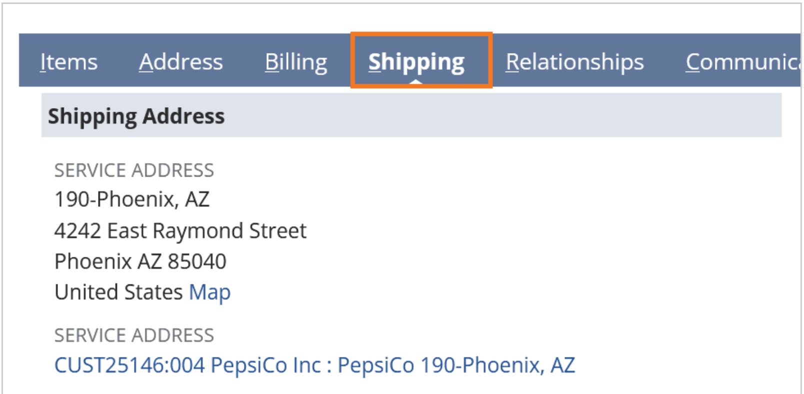
> **Identifiers**
>
> Some vendors have a single person to send POs to, while others may have many. Recipients are typically have one of the following suffixes:
>
> - *Customer Service*
> - *National Accounts*
> - *Dispatch*
> - *Email POs*
> - *CC POs*
> - *Broker*
> - *Major Accounts*

3. Go to **Message**. Remove everything from **SUBJECT** except for the `PO #`.

4. Paste the name of location at beginning of **SUBJECT** line, along with container attributes (if applicable), request type, and service date.

Tip

You can find this information on the PO's **Shipping** subtab.



5. Write a **MESSAGE** requesting service. Include any applicable container attributes to help the vendor. End every message request with `please confirm`.
6. Go to **Attachments**. For **TYPE**, choose *PDF*. This attaches a PDF of the PO to the email for the vendor to review.
7. Verify everything is correct.
8. Select **Merge & Send**.

Confirming the PO

1. After sending the PO to the vendor's email, wait for them to respond with confirmation. You may have to send another email or call if they don't respond.
2. If needed, call the vendor contact. Request the service and confirm the date of service.

Tip

You can find a contact number under the **Contacts** subtab on the Vendor Record (select the **CASE VENDOR** link on the Case to access).

After confirming with the vendor:

1. Open the PO. Select **Edit**.
2. Update the confirmation fields at the top:
   1. Enter the **CONFIRMED BY** name of the vendor representative who confirmed the service.
   2. Enter the **PO CONFIRMED DATE**.
3. Update **DATE** to the date confirmed by the vendor.

   If the date is different than requested by customer

   1. In the SO, under **Items**, update the **SERVICE DATE** for each line item receiving service to the date confirmed by the vendor.
   2. In the PO:
      - Under **Primary Information**, update the **DATE** field.
      - Under **Items**, update the **SERVICE DATE** field for each line item to the date confirmed by the vendor.

4. Select **Save**.

Closing the Case

When you've completed all the steps necessary in the NetSuite Support Case, update the following:

1. Update **STATUS** to *Closed*.
2. Update **MAIN ISSUE**, **ISSUE DETAILS**, and **RESOLUTION** with the most applicable options.
3. Select **Save**.