Support Management

2022.2

January 25, 2023

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at https://www.oracle.com/corporate/accessibility.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Sample Code

Oracle may provide sample code in SuiteAnswers, the Help Center, User Guides, or elsewhere through help links. All such sample code is provided "as is" and "as available", for use only with an authorized NetSuite Service account, and is made available as a SuiteCloud Technology subject to the SuiteCloud Terms of Service at www.netsuite.com/tos.

Oracle may modify or remove sample code at any time without notice.

No Excessive Use of the Service

As the Service is a multi-tenant service offering on shared databases, Customer may not use the Service in excess of limits or thresholds that Oracle considers commercially reasonable for the Service. If Oracle reasonably concludes that a Customer's use is excessive and/or will cause immediate or ongoing performance issues for one or more of Oracle's other customers, Oracle may slow down or throttle Customer's excess use until such time that Customer's use stays within reasonable limits. If Customer's particular usage pattern requires a higher limit or threshold, then the Customer should procure a subscription to the Service that accommodates a higher limit and/or threshold that more effectively aligns with the Customer's actual usage pattern.

Beta Features

Send Us Your Feedback

We'd like to hear your feedback on this document.

Answering the following questions will help us improve our help content:

- Did you find the information you needed? If not, what was missing?
- Did you find any errors?
- Is the information clear?
- Are the examples correct?
- Do you need more examples?
- What did you like most about this document?

Click here to send us your comments. If possible, please provide a page number or section title to identify the content you're describing.

To report software issues, contact NetSuite Customer Support.

Table of Contents

Support Management

Setting Up Case Management

To set up and handle support cases, you should first create case types and case origin types for organizing your cases. Then you can decide which items and issues you want to offer support for.

Next, you set up case rules and territories to automatically assign cases to support reps. Then you can complete the rest of the Setting Up Support Checklist.

When you finish this chapter, support reps will be able to sort and respond to cases efficiently.

This chapter is designed for employees with the Support Administrator or Support Manager roles. Use it to set up the tools for managing the case workflow of your support team. The case workflow includes the process of a case from the time it is entered until the time the case resolved and closed.

Setting Up Support Checklist

Use the checklist below to quickly set up the case workflow for your support team.

#	Task
1	Creating Case Types
2	Creating Case Origins
3	Creating Case Statuses
4	Creating Case Priorities
5	Creating Case Issues
6	Offering Support for Items
7	Setting Up Support Groups
8	Creating Case Rules
9	Creating Case Territories
10	Assigning Priorities to Territories
11	Setting Case Escalation Rules and Assignments
12	Using Email Case Capture
13	Online Case Forms
14	Customizing Case Forms
15	Customizing Support Notification Email
16	Setting Customer Service Preferences
17	Setting Up Customer Support in NetSuite OneWorld

Creating Case Types

A case type represents the kind of support issue your customer is reporting. Knowing what kind of issue a case is about helps support employees get important information about a case quickly.

> For example, Wolfe Electronics creates a case type called Suggestion. When support reps receive requests for new items, support reps select Suggestion in the Case Type field.

The Case Type field appears on case records. This field can also appear in the online case form on your Web store or Web site. For more information about online case forms, see Online Case Forms.

Three default case types are offered by NetSuite:

- Concern
- Problem
- Question

To create a case type:

1. Go to Setup > Support > Case Types > New.
2. In the **Case Type** field, enter a name for this case type.

   Customers and support reps select a case type when entering case records.
3. In the **Insert Before** field, you can control where the new type appears in the type list in dropdown fields.
4. In the **Description** field, enter a brief description of what cases should fit in this case type.

   This description is displayed in the **Support Case Types** list.
5. Click **Save**.

Your support case type is now available on case records.

To edit existing or default case types, go to Setup > Support > Case Types. Click the name of the case type you want to change. Click **Edit**, and make your changes. Then, click **Save**.

On the Support Case Types list, you can inactivate any case types that you do not want to use. Check the **Show Inactives** box at the top of the page. The page will refresh and an **Inactive** column is displayed. Check the boxes next the case types you no longer want to use, and click **Submit**.

You can base case rules on case types. For example, one of your support representatives handles all problems and another support rep answers all questions. You can set up your case rules, and then territories, by the case types.

Creating Case Origins

A case origin type is how a support case is reported. Knowing how a case was reported helps your support people track communication with your customers.

> For example, Wolfe Electronics links to their online case form from their Web site. They create a new case origin, Online, for cases that are reported with the online form.

The Case Origin Type field appears on case records. This field can also appear in the online case form on your Web store or Web site. For more information about online case forms, see Online Case Forms.

The following default case origin types are included in your account:

- Phone

- Web
- Email
- Other

To create a new case origin:

1. Go to Setup > Support > Case Origin Types > New.
2. In the **Case Origin** field, enter a name for this case origin type.

   This name appears in a list on case records in the **Origin** field.
3. In the **Insert Before** field, you can choose to place this type before an existing type in the list.
4. In the **Description** field, enter a description of this case origin type or what cases should have this origin type.
5. Click **Save.**

To change your case origins, go to Setup > Support > Case Origin Types. Click the name of the origin you want to change. Click Edit, and make your changes. Then, click Save.

To inactivate case origins, check the Inactive box on case origin records. These origin types no longer appear on new cases. To see inactive case origins, check the Show Inactives box at the bottom of the Case Origin Types list.

You can base case rules on case origin types. For example, one of your support representatives handles all email messages and another support rep answers all phone calls. You can set up your case rules, and then territories, by the case origin.

Creating Case Statuses

You can create custom statuses for your customer support cases. Statuses can be used to communicate how close a case is to being closed or how the case was closed.

The Case Status field appears on case records. If you use online case forms you can choose to either show or hide the Case Status field on the form.

> For example, Wolfe Electronics wants to keep cases open until customers confirm that their issue is completely resolved. They edit the In Progress status to Awaiting Customer Reply for cases that need more information. They then create the following new statuses: Repairs Needed, Awaiting Confirmation and Confirmed.

The following case statuses are provided by default, and can be edited:

- Not Started
- In Progress
- Escalated
- Re-Opened
- Closed

To create a case status:

1. Go to Setup > Support > Case Statuses.

2. In the **Case Status** field, enter a name for the new status.

   This name appears in the **Status** field on case records.

3. In the **Insert Before** field, select where you would like this status listed in the **Status** field on case records.

   For example, you may want to arrange statuses in order of how cases are resolved or alphabetically.

4. In the **Stage** field, choose whether this status describes cases that are Open, Escalated or Closed.

   Statuses must be associated with a stage.

   For example, you can create an Awaiting Customer Response status for the Open State. This status would denote that support has asked for more information from the customer to resolve the case.

5. Check the **On Hold** box if cases with this status should not have time counted against them.

   For example, you are waiting for a reply from a customer or are waiting for a solution from another department. You can use an on hold status to pause the case's time log. This lets you more accurately track the efficiency of a support team.

6. Check the **Show Awaiting Support Reply** box if you want this case status to be included in searches and case tracking reports.

7. If you use the **Issue Management** feature, check the **Auto Close With Issues** box. This option automatically closes a case of this status when all attached issues are closed.

   You must also have the **Automatically Close With Linked Issues** box checked at Setup> Issues > Issue Preferences.

8. In the **Description** field, enter a definition of cases that should be assigned this status.

9. Click **Save**.

Creating Case Priorities

You can create new case priorities to fit the needs of your support team's case workflow. This lets you customize the rankings you give to cases to convey which cases need to be answered first.

> For example, instead of using the low, medium, and high priorities, Wolfe Electronics renames these three priorities to 1, 2, and 3. They then create additional priorities up to 10, with cases rated 1 having the highest priority, and cases rated 10 the lowest.

To create a case priority:

1. Go to Setup > Support > Case Priorities > New.

2. In the **Case Priority** field, enter a name for the new priority.

   This name appears in the **Priority** field on case records.

3. In the **Insert Before** field, select where you would like this priority listed in the **Priority** field on case records.

   For example, you may want to arrange statuses in order of descending priority or alphabetically.

4. Enter a description for cases that should be assigned this priority.

5. Click **Save**.

You can now select this priority on case records.

Creating Case Issues

A case issue is any issue you list as one you offer support for. Knowing what issue a support case is about helps your support people get important information about a case quickly.

> For example, Wolfe Electronics creates a support issue for Installation. When customers and support reps enter cases about installing parts or setting up systems, they select Installation in the Issue field on case records.

Issues you offer support for differ from items you offer support for. Items refer to the goods and services you sell to customers, and you can choose which of these items you want to offer support for. For example, an electronics company might offer support for stereos as an item and sound quality as an issue. To offer support for an item, go to Lists > Accounting > Items. Click Edit next to the name of the item, check the Offer Support box, and click Save.

If you use the Issue Management feature, case issues also differ from the issue records you use to track problems with items or products. Case issues cover common subjects of cases, whereas issue records are entered for problems that need to be addressed by an engineering team.

On a case record, case issues are entered in the Issue field.

To create a case issue:

1. Go to Setup > Support > Case Issues > New.
2. In the **Case Issue** field, enter a name for this support issue.

   For example, you may want to offer support for those having troubles in your Web site, so you would enter Web site.
3. Customize the order in which this case issue appears on case records and online case forms. Choose an item in the **Insert Before** read-only field, above which this case issue will be inserted.
4. In the **Description** field, enter a brief description of what types of cases fall under this issue.
5. Click **Save**.

To change your support issues, go to Setup > Support > Case Issues > New. Click Edit next to the name of the case issue you want to change.

To inactivate support issues, check the Inactive box on issue records. These issues no longer appear on new cases. To see inactive issues, check the Show Inactives box at the bottom of the Support Issue list.

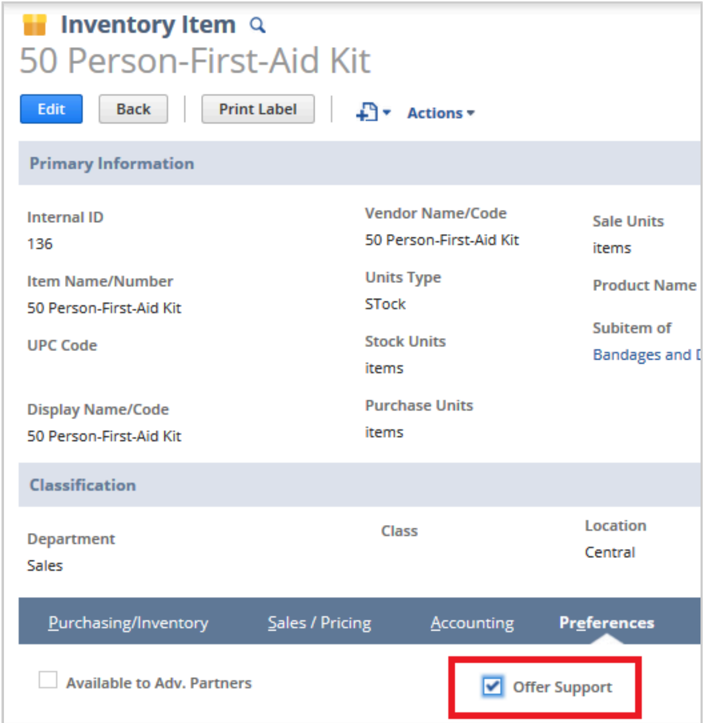
You can base case rules on support issues. For example, one of your support representatives handles all questions about deliveries and another support rep answers all questions about take out. You can set up your case rules, and then territories, by the case issues.

Offering Support for Items

You can choose to offer support for items in addition to support issues. This can help you filter your case load even more accurately. You can assign cases dealing with a specific item to a support rep who specializes in that item.

> For example, Wolfe Electronics decides to offer support for the Creativo 2400. Tom, a support rep, is an expert on the Creativo 2400. When cases arrive on the Creativo 2400, they are quickly assigned to Tom.

You can choose to offer support for the following types of items:



- Inventory
- Assembly/Bill of Materials
- Kit/Package
- Noninventory items for sale or resale
- Other charge items for sale or resale
- Service items for sale or resale

You choose to offer support for an item on the item record.

To offer support for an item:

1. Go to Cases > Other Lists > Items.
2. Click **Edit** next to the item you want to offer support for.
3. On the item record, click the **Preferences** subtab.
4. Check the **Offer Support** box.
5. Click **Save**.

Support reps or customers can choose this item in the Item field on case records or online case forms. You can then quickly assign it to the person or group who has the most expertise on the item.

Setting Up Support Groups

Support groups let you invite a group of people to events, manage group events on group calendars, assign cases to groups and more.

You create a group of employees to designate as a support group. Cases and case territories can then be assigned to the support group to filter cases for a quicker response to the customer.

When you create a group, a calendar is also created for that group. When you invite the group to events, everyone with access to your account can view the group's events on the group calendar. If a group member accepts an event invitation, that event also shows on the group member's personal NetSuite calendar.

For example, Wolfe Electronics has a group of support reps that specialize in printers. Wolfe sets up a support group of these employees so that cases dealing with printers can be assigned to the group. The cases list can then be filtered to only those cases assigned to this group, and any of the support reps can grab a case.

To create a support group:

1. Go to Customers > Relationships > Groups > New.
2. On the Create Group page, select **Static**.
3. Select **Employees** as the kind of members you want to include in the group.
4. Click **Continue**.
5. In the **Name** field, enter a name for this group.

   You will select this name in the Assigned filter on the cases list and in the Assigned To field on case records.
6. If this group already has a group email address in your email application, enter the address in the Email field.
7. Check the **Support Group** box.
8. On the **Members** subtab, add members to this group in the following ways:
   - To add individual members, enter part of a member's name in the **Name** column, and press Tab. Select a member, and click **Add**. Repeat these steps for each member.
   - Click **Add Multiple,** and hold CTRL to select more than one member from the list.
   - Click **Add With Search** to enter search criteria for the members you want to add.

   You can use more than one of these methods to add members to the same group. For example, you can select a few members individually and then add all the members that meet search criteria.
9. Set the preferences for viewing the group calendar on the **Calendar Preferences** subtab.
10. Click **Save**.

You can now assign cases and case territories to this group. This allows you and your support team to filter the Cases list however you choose for the most efficient customer service workflow.

Note: Anyone can filter the cases list to see cases assigned to a support group. You can create support groups solely for filtering the cases list by subject. Create a group with miscellaneous members and a title that describes the type of case that should be assigned to the group. Support administrators can then assign territories to the group to automatically filter cases into this group.

Setting Customer Service Preferences

The Support Preferences page is where you set your default preferences for your customer support team's workflow.

To set support preferences, go to Setup > Support > Support Preferences.

General Support Preferences

You can set the following preferences on the General subtab on the Support Preferences page.

Preference	Description
Case Email Setup	
Default Case Form to Send to Customer	Check this box to have the email Reply box on case records checked by default.
Default Case Form to Internal Only	Check this box if you want replies to cases marked Internal Only by default.
Default Case Profile	Select the default profile for incoming support cases. See Creating Case Profiles
Preferences	
Escalate to Support Reps Only	Check this box if you only allow cases to be escalated to support reps. If you clear this box, cases can be escalated to partners, vendors and non-support rep personnel.
Receive Customer Replies in Case List Only	Check this box to restrict the viewing of customer case messages to the case list. If you clear this box, the assigned support rep is sent an email message containing the customer message, to which they can reply.
Messages Reopen Closed Cases	Check this box to allow closed cases to change status to **re-opened** when a message is added to the case. Clear this box to have the case remain closed when a customer replies and prompt to create a new case. If you check this box and also choose to lock closed cases, the locked cases preference is not overridden. Cases will not be reopened with new messages.
Receive Customer Replies in Case List Only	Check this box if you do not want to allow support reps to receive email when customers reply to cases. If you clear this box, replies are both sent to the support rep and stored on the case record. Any subsequent replies are also added to the case record. This preference only shows if you have the Capture Email Replies feature enabled.
Only Link Approved Solutions to Cases	Check this box to only allow solutions that have been approved to be attached to case records. All solutions set to display online are also available for attaching to cases.
Defaults	
Status for New Cases	Select the status a new case is set to when first created. You can create new statuses at Setup > Support > Case Statuses > New.
Status for Grabbed Cases	Select the status a case is set to when it is grabbed by a support rep.
Status for Reopened Cases	Select the status a closed case is set to after being reopened.
Status for Escalated Cases	Select the status a case is set to when a case is escalated to another employee.
Status for Closed Cases	Select the status a case is set to when closed.
Priority for New Cases	Select the case priority newly created cases are set to. You can create new case priorities at Setup > Support > Case Priorities > New..

Preference	Description
Case Lockout	
Lock Closed Cases After Lockout Period	Check this box to lock closed cases from being edited after the specified number of days in the Period (Days) field. Only account administrators can edit locked cases.
Period (Days)	Specify how many days you want closed cases to remain editable for after they have been closed. Enter 0 if you want to lock editing immediately after a case closure.

Support Email Notification

You can set the following support email preferences on the Notification subtab of the Support Preferences page.

If you use NetSuite OneWorld, you can create separate notification templates for each subsidiary. For more information, see Setting Subsidiary-Level Support Preferences.

Column & Preference	Description
Creation	
Notify Filer On Support Rep Cases	Check this box to automatically send email notification to customers when cases are created manually in your account by support reps. Checking this box also enables notification to employees when they submit help desk cases. **Note:** All notification email for case creation is sent using the template selected in the Customer Notification Template field.
Notify Filer On External Cases	Check this box to automatically send email notification to customers when cases are submitted using the external case form in the Customer Center. **Note:** This does not send notification to customers submitting cases using online case forms. To send notification to these customers, select an email template in the Send Auto-Reply Email field. This field is on the Set Up Workflow subtab of the online form record.
Notify Main Support Email On External Cases	Check this box to send notification email to the support email address entered on the General subtab. Email is sent when new cases are created with an external case form in the Customer Center.
Inbound Email Case Capture	
Notify Customers	Check this box to automatically send email notification to customers when cases are submitted by email using the Email Case Capture feature. Email notification is sent using the template you select in the Customer Notification Template field.
Notify to List	Check this box to send notification that a case was created to each email address listed in the **To** line of the original email. This preference works like a Reply To All for the 'To' line only.
Notify CC List	Check this box to include addresses in the **CC** line of the original email when replying to incoming cases with notification.

Column & Preference	Description
Assignment	
Notify Assignees	Check this box to have notification email automatically sent to support reps when cases are assigned to them.
Send Notification Replies to Customer	Check this box to send the customer a copy of the Support Rep's reply when they are assigned to a case. The reply appears on the case record.
Update	
Notify Assignees	Check this box to have notification email sent to support reps when any changes are made to a case that is assigned to them. This includes when customers reply to case creation notification.
Send Notification Replies to Customer	Check this box to send the customer a copy of the Support Rep's reply when the case is updated. The reply appears on the case record.
Escalation	
Notify Escalatees Upon Update	Check this box to send a notification message to the person the case has been escalated to, whenever the case is updated.
Send Notification Replies to Customer	Check this box to send the customer a copy of the Support Rep's reply when the case is escalated. The reply appears on the case record.
Closure	
Notify Customer Upon Automatic Closure	Check this box to notify a customer when their case is automatically closed because all other cases linked to the case have been closed. This preference requires Automatically Close Linked Cases to be enabled. Go to Setup > Issues > Preferences > Issue Preferences. **Note:** The notification is not sent if a linked case is manually closed.

Important: Assignment notifications are not sent a user logs in and assigns a case to themselves. Additionally, update notifications are not sent when a user updates a case to which they are the assignee. You can work around this limitation by creating a SuiteScript that sends a notification to the logged in user after a case is saved.

External Case Capture Preferences

The following email case capture preferences are available on the External subtab of the Support Preferences page.

Preference	Description
External Case Form Redirect URL	Enter the Web page you want customers to go to after submitting a case. This applies to cases sent from the Customer Center or the My Account tab of your NetSuite Web site.
Default Customer Center Case Form	Select the online case form you want to link to in your Customer Center. Your customers access this form when they click Contact Support in the Customer Center.
Create New Lead on No Match	Check this box to create a lead record when case information submitted through the external case form does not match any existing records.

Preference	Description
Site Color Theme	Select the color theme you want to display in the Customer Center. You can create custom color themes at Commerce > Site Builder > Appearance > Color Themes > New

Inbound Support Email Preferences

The following fields are found on the Inbound Email subtab of the Support Preferences page.

If you use NetSuite OneWorld, you can use a separate inbound email address and anonymous customer placeholder for each subsidiary. For more information, see Setting Subsidiary-Level Support Preferences.

Preference	Description
NetSuite Address	Use this email address to forward email from your support email address to NetSuite. When email arrives at this address, it is converted into case records in NetSuite. You need to configure your email server to activate this feature. For more information, see Using Email Case Capture **Warning:** Only use this email address for capturing email messages as case records. All messages sent to this address are converted to cases in your NetSuite account.

Ordering Support Lists

On the Ordering subtab of the Support Preferences page, you can change the order in which case-related fields are displayed on case records. To change the order, click the icon next to the field label. When the cursor changes to a four-way arrow, drag the field column to where you want it to appear.

Your support settings and defaults are complete. To manage how cases are routed, go to Setup > Support > Case Management > Case Rules and Setup > Support > Case Management > Case Territories. To manage case territories, go to Setup > Support > Case Management > Case Territories > New.

Marking Employees as Support Reps

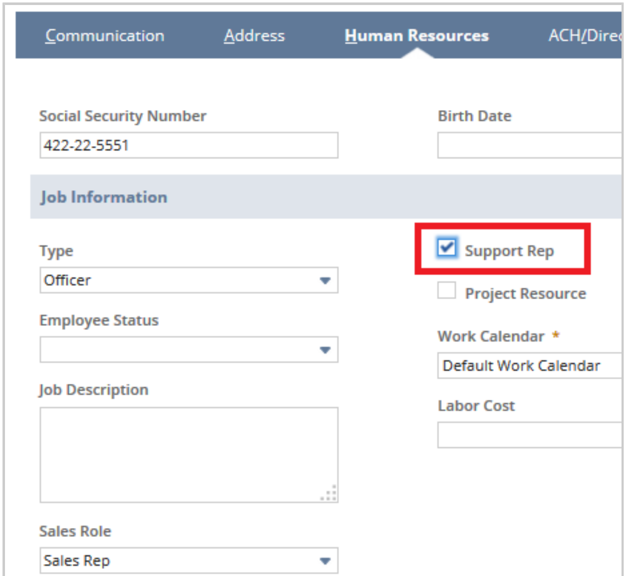
To include employees in Assigned To fields on case records, you must check the Support Rep box on the employee record for each rep.

Note: Only those with roles that include Edit or Full Employees permission can edit employee records to designate support reps.

To mark an employee as a support rep:

1. Go to Lists > Employees > Employees.
2. Click **Edit** next to the employee you want to mark as a support rep.
3. On the employee record, click the **Human Resources** subtab.

4. Under Job Information, check the **Support Rep** box.
5. Click **Save**.



Employees who are marked as support reps appear in the Support Rep or Assigned To fields on:

- Case records
- Support territories
- Escalation assignments

Additionally, employees marked as support reps are included on customer support reports and report snapshots.

Creating Case Profiles

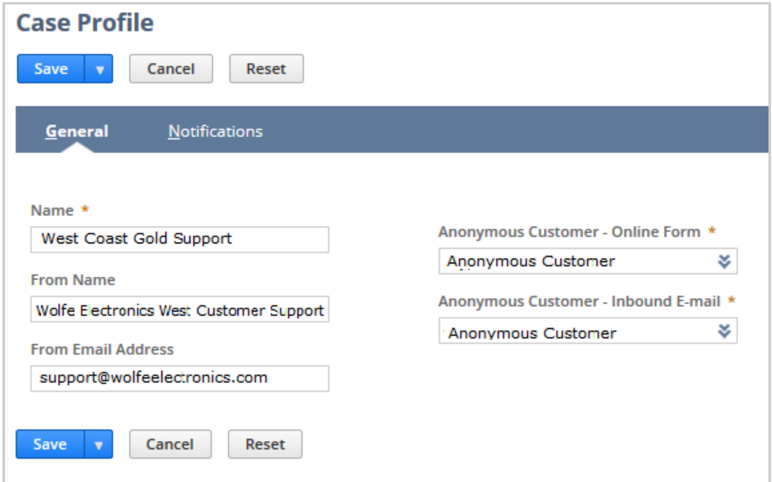
You can create case profiles that enable you to apply different configurations to support cases. Using case profiles provides control over the branding of your support communication. By setting the templates that are used for each profile, you can do the following:

- Provide unique support communication for multiple web sites with different branding, From names, and email addresses
- Have different identities for replying to support cases that are independent of subsidiaries
- Have different case capture email addresses that are independent of subsidiaries

Case profiles include the following settings:

- Support From name and email address
- Anonymous customers for inbound email and online forms
- Customer and employee case notification templates

If you use NetSuite OneWorld, you can create default case profiles for each subsidiary. These profiles are set by default on cases created for that subsidiary.



To create a case profile:

1. Go to Setup > Support > Case Profiles > New..
2. On the **General** subtab, enter a name for this profile. This is the name shown in the **Profile** field on case records.
3. In the **From Name** field, enter the name you want to show in the **From** field on email notifications.
4. In the **From Email Address** field, enter the address you want to show in the **From** field on email notifications. This will be the address for communication sent from the **Reply** field in the case record.
5. If you use NetSuite OneWorld, select a subsidiary in the **Subsidiary Filter** field. The selection restricts the use of this profile to cases for a specific subsidiary.
6. Select the **Anonymous Customer - Online Form** record to assign to cases submitted by people with no existing customer record.
7. Select the **Anonymous Customer - Inbound Email** record to assign to cases submitted through Email Case Capture by people with no existing customer record.
8. Click the **Notifications** subtab.
9. Select the **Customer Notification Templates** to use to notify customers when cases are created, updated, closed, or escalated.
10. Select the **Employee Notification Templates** to use to notify employees when cases are assigned and updated. Employees are also notified when updates are cc'd to another employee, and when a case is escalated.
11. Click **Save**.

Now, you can select this profile on a case record or assign it through online case forms.

Assignment Rules & Territories

You can set up rules and territories to automatically assign cases to support reps or support groups. You must first have defined your case types, case origins, support issues and support items.

When you create a case rule, you set criteria for a certain field on the case record. You then group rules into territories and assign a support rep to the territory. Any new cases that meet the criteria of each rule in a territory are assigned to that support rep.

Creating Case Rules

A case assignment rule is a set of parameters for how support cases are distributed to support representatives. The rules are based on fields found in the case record. After you create case rules, they are grouped together as case territories. These territories are assigned to your support representatives so that new support cases are distributed automatically.

For example, Wolfe Electronics creates a rule called Installation Issues for cases with Installation selected in the Support Issue field. They can then group this rule with other rules to create a territory.

If you use NetSuite OneWorld, you must create case rules based on the subsidiary field. This field ensures that support reps are assigned cases only in subsidiaries they have access to. For more information, see Customizing Support Rep Roles for NetSuite OneWorld.

To create a case rule:

1. Go to Setup > Support > Case Management > Case Rules > New.
2. On the Select a Rule Field page, click the name of the field you want to base this rule on.

   The type of field you select determines what kind of criteria, and in some cases sub-criteria, you can set.

   Under Customer Fields, you can select a field from customer records that you want to base the rule on. For example, you can create a rule for all cases submitted by customers from Maine.
3. On the Case Field Rule page, enter a name for this rule.
4. Enter a description for this rule.
5. The field you are basing this rule on appears below the Description.
6. Set the criteria you want for this rule. The criteria you can set are based on the field type:
   - **Numerical fields** – criteria and subcriteria based on numerical ranges
   - **Text fields** – criteria and subcriteria based on case-sensitive, alphanumeric content
   - **List fields** – criteria based on including or excluding choices in pre-existing list

     You can select more than one choice in the list by pressing your keyboard's CTRL key while selecting additional options with your mouse.
7. When you have finished setting your criteria, click **Save**.

After you have created the case assignment rules, group those rules into territories and assign the territories to support representatives. To do this, go to Setup > Case Management > Case Territories > New. For more information, see the help topic Creating Case Territories.

Creating Case Territories

A case territory is a group of case assignment rules. The case territories use the case assignment rules to determine how cases are distributed to your support reps and support groups.

Before you set up a case territory, you should create the case rules that make up the territory.

For example, the support manager for Wolfe Electronics has two rules. One rule for the support issue Installation. Another rule for the support items Creativo 2000, Creativo 2400, Impressivo 1000 and Impressivo 1500. The manager creates a territory that includes both rules, and assigns the territory to Tom Taylor. Now, when a customer submits a case about installing any of these models of computers, the case is automatically assigned to Taylor.

If you use NetSuite OneWorld, you must create case rules based on the subsidiary field. This field ensures that support reps are assigned cases only in subsidiaries they have access to. For more information, see Customizing Support Rep Roles for NetSuite OneWorld.

To set up a case territory:

1. Go to Setup > Support > Case Management > Case Territories.
2. Click **New**.
3. On the Case Territory page, enter a name for this territory.
4. Enter a description for this territory.
5. Select **Match All Rules** if you want cases to match all the rules you select to be assigned using this territory.

   Select **Match Any Rule** if you want a case to be assigned using this territory if it matches any one of the rules you select.
6. Click the **Configure Rule Definitions** subtab.
7. Select a rule you want to apply to this territory.
8. Click **Add/Edit**.
9. For each rule you want to apply, repeat steps 6 and 7.
10. Click the **Support Assignment** subtab.
11. Select a support rep or support group this territory is assigned to.

    To make an employee appear in this list, go to the employee's record, click **Human Resources**, and check the **Support Rep** box.

    To make a group appear in this list, go to the group's record, and check the **Support Group** box.
12. Click **Add/Edit**.
13. For each support person or group you want assign this territory to, repeat steps 10 and 11.

    Cases are distributed evenly to all the support reps and groups listed.
14. Click **Save**.

After you have set up the case territories, the territories are assigned priorities. Priorities determine which territory a case should be classified in if it matches more than one territory.

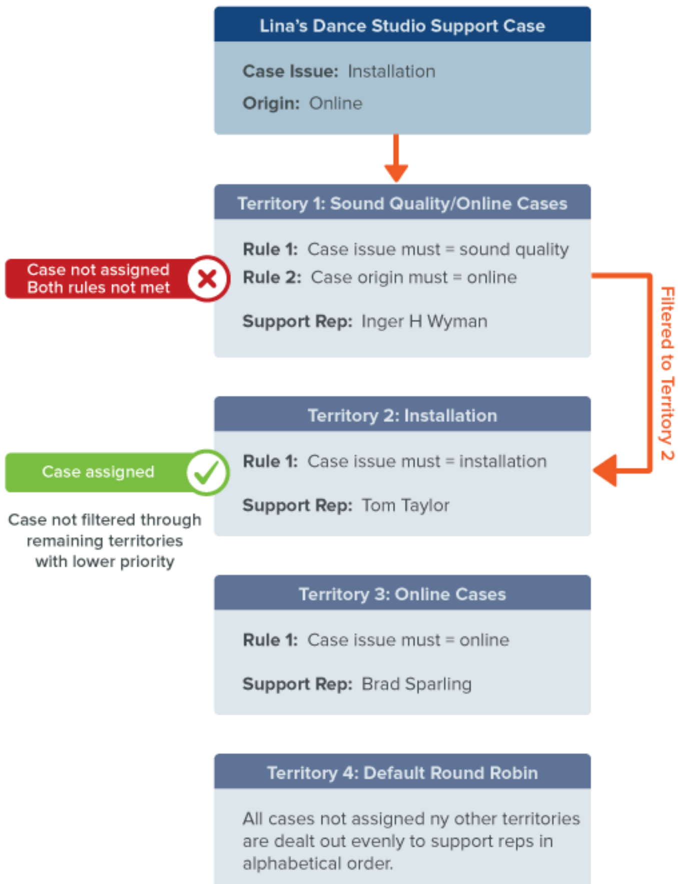
> **Note:** If you do not create and assign territories, the default round-robin territory automatically distributes cases evenly among support reps. If you do not want cases to be assigned automatically, go to Setup >Support > Manage Case Territories, and click Default Round-Robin. Click Edit, and check the Territory is Inactive box. Now, all cases will be marked as Unassigned until you assign them.
>
> If you do not inactivate the Default Round-Robin territory, cases not assigned by territories are distributed using the round-robin territory.

> **Tip:** You can change the priorities on the Manage Case Territories page. Click the handlebars next to the territory you want to move up or down and drag it to the new position. To view the rules for a territory or make changes to a territory, click the name of the territory in the Case Territory column.

Assigning Priorities to Territories

After you set up case territories, you assign priorities to territories. Priorities determine which territory a case is classified in if the rules match more than one territory.

For example, Wolfe Electronics has two territories: one for cases involving installation of computers and one for cases submitted online. Some cases are both submitted online and involve installing computers, however.



To assign priorities to case territories:

1. Go to Setup > Support > Case Territories.
2. Click the line a territory is in to select the line.
3. Use the **Move** buttons to rearrange the order case territories are applied to new cases. The territory listed first is applied first.

   You can also grab the left side of a line with your mouse and drag and drop territories to move them.
4. Click **Save**.

The Default Round-Robin territory always has last priority, regardless of where it is placed in the territory list.

Now, when case records are created, they are assigned to case territories according to the priority you set.

Reassigning Cases to Territories

You can reassign existing cases to your case territories. This is useful when restructuring your case territories.

To reassign cases to new case territories:

1. Go to Setup > Support > Territory Reassignment.
2. On the **Criteria** subtab, select criteria that will return a list of the cases to be reassigned.

   The reassignment is determined using your current set of assignment rules and territories.
3. On the **Results** subtab, you can customize the information that displays in the list of found cases.
4. To use the **Audience** subtab, click the **Public** box above the subtabs. Select the people that should be able to use this update again with your criteria. You must save the update for it to be available to this audience.

   If you check the **Public** box but not select audience members, the update is available to all users in your account by default.
5. Click **Preview**.
6. In the **Apply** column clear the box next to any cases that should not be reassigned.
7. Click **Perform Update** to reassign the cases, or click Save to reassign the cases and save the update for later use.

Now, these cases are reassigned according to your case territories in priority order.

To access a saved reassignment update, go to Lists > Mass Update > Saved Mass Updates.

Setting Case Escalation Rules and Assignments

Set up escalation rules and assignments to ensure that high priority cases are routed to the correct person at the right time.

With escalation rules, you set criteria to search cases. You then create escalation assignments to group these rules. When a case matches the criteria you set, it is automatically assigned to the person or group you have selected for the escalation assignment.

> Wolfe Electronics sells a warranty plan that guarantees the customers' cases will be resolved within 24 hours. They set up an escalation rule that uses their custom warranty field on customer records. They create an additional rule that includes all cases that have been open greater than or equal to 12 hours.

> **Note:** Case escalations are processed by NetSuite in five minute intervals. Any case escalation rules based on shorter time periods may not be processed when expected.

Case Escalation Rules

To set up case escalation rules, an administrator must enable the Automated Case Escalation feature. Go to Setup > Company > Setup Tasks > Enable Features. On the CRM subtab, check the Automated Case Escalation box and then click Save.

To create a case escalation rule:

1. Go to Setup > Support > Escalation Rules > New..
2. Choose the field on the case record or the customer's record you want to base your rule on.

   With escalation rules, you can base escalation on the following amounts of time:

   - Since the case was created
   - Since it was last modified by the customer
   - Since it was last modified by someone in your account
3. Create a name for your escalation rule. You will choose this name when you group rules into assignments.
4. If needed, you can enter a brief description of this rule.
5. In the **Criteria** field, select terms for your search.

   You may also need to make selections in the field(s) below based on the case record field you are using for this rule.
6. Depending on the case record field you are basing the rule on, you may be able to set subcriteria for this rule:
   1. Select **Match All Conditions** to have a case meet all the subcriteria you set to be escalated based on this rule.

      Select **Match Any Conditions** to have a case meet any one of the subcriteria you set to be escalated based on this rule.
   2. In the **Sub-Criteria** column, select terms for your criteria.
   3. In the next column, enter or select criteria, and click **Add**.
7. Click **Save** to save your rule.

For example, you have a group of customers who have purchased a warranty plan. If they submit a case, it will be resolved within 24 hours. You can set up an escalation rule that includes every customer in this group. Then create a rule for duration since case creation of greater than equal to 12 hours. You then create a case escalation assignment that includes both rules and assign it to a support team devoted to resolving high priority cases.

> **Note:** To exclude cases from escalation based on rules, you must create rules to include only open cases and cases created after today.

Case Escalation Assignments

Case escalation assignments use rules to determine how cases are escalated and who they are escalated to.

Before you set up an escalation assignment, you should create escalation rules. For more information, see Case Escalation Rules.

> Wolfe Electronics creates a case escalation assignment. It includes a rule for customers who have purchased a warranty. It also includes a rule for cases that have been open for greater than or equal to 12 hours. They then assign it to a support team devoted to resolving high priority cases.

To set up a case escalation assignment:

1. Go to Setup > Support > Manage Escalation Assignments > New.
2. On the Escalation Assignment page, enter a name for this assignment.

3. Enter a description for this assignment.
4. Select **Match All Rules** if you want cases to match the criteria in all rules you select to be escalated by this assignment.

   Select **Match Any Rule** if you want cases to match any of the criteria in the rules you select to be escalated by this assignment.
5. On the **Configure Rule Definitions** subtab, select a rule, and click Add.
6. Continue adding rules if needed, and click Add after each rule.

   > **Note:** To exclude cases from escalation based on rules, you must create rules to include only open cases and cases created after today.
7. On the **Escalation Assignment** subtab, select the person or group cases that fall into the rules for this assignment should be escalated to.
8. Click **Add**.
9. Continue adding individuals or groups if needed, and click **Add** after each.

   Cases are distributed evenly to all the individuals and groups listed.
10. Click **Save**.

After you set up escalation assignments, you can prioritize them. Priorities determine which assignment a case should be classified in if it matches rules for more than one assignment.

You can change the priorities on the Manage Escalation Assignments page by clicking the handlebars next to an assignment and dragging it up or down. The first assignment in the list in the list is the first assignment a case is sifted through. To view the rules for an assignment or make changes to an assignment, click its name in the Territory column.

Using Email Case Capture

The Email Case Capture feature automatically converts customer support messages your company receives into organized cases in NetSuite. An administrator can enable this feature at Setup > Company > Enable Features > CRM > Support. Depending on the specific requirements of your business, you can use case capture to create a simple catch-all support address. You can also create a more sophisticated customer support model by using Case Profiles.

Case profiles, let you create additional support addresses and route support issues to a particular product area, team, or in OneWorld, subsidiaries. Go to Setup > Support > Case Profiles. Case profiles are also useful from a brand consistency perspective. An organization may be responsible for handling the support of multiple entities, yet these entities want to keep their own identity. For further information about case profiles, see Creating Case Profiles.

> Wolfe Electronics has been receiving email from customers at support@wolfeelectronics.com, and responding to them directly using Outlook. As the business has grown this has become cumbersome and time consuming. They set up case capture and three case profiles—Phones, PC, and Home. Now support email is automatically routed to the correct product team and appears in the relevant case list in NetSuite.

When cases are submitted, each case is automatically:

- saved in your case queue
- saved on the customer's record
- assigned to a support rep using rules and territories

Locating NetSuite Addresses

Case capture works by forwarding your company's support email address to a NetSuite-generated address. Remember this when you set up forwarding on your mail server.

To locate the general case capture NetSuite address:

1. Go to Setup > Support > Preferences > Support Preferences.
2. Click on the **Inbound Email** subtab.
3. Copy the **NetSuite Address**.

To locate the NetSuite address attached to a case profile:

1. Go to Setup > Support > Case Profiles.
2. Click **View** on the required profile.
3. Copy the **NetSuite Inbound Email Address**.

> **Note:** When you set up a new case profile, the **NetSuite Inbound Email Address** is generated when you click **Save**. From the profile list, click **View** to see it.

Prerequisites for Setting Up Email Case Capture

Your company email server administrator must set up the following items on your Microsoft Exchange server:

1. A Contact to add your **NetSuite Address** to.
2. A User for the support address you will be using, for example support@ABC.com
3. Activate forwarding on the User account you created, using the credentials from the newly-created Contact.

For detailed instructions on how to set up these prerequisites, please consult the following Microsoft support pages:

- Create a Mail Contact
- Create a Mail User
- Configure Email Forwarding for a Mailbox

In NetSuite

- An administrator must enable auto-generated numbers for Support Cases. Leave the **Allow Override** box unchecked. See Setup > Company > Auto-Generated Numbers.
- Optional - Enable the related feature Capture Email Replies. When enabled, all messages sent from NetSuite have a customized reply to address. When a customer selects reply on their mail client, the message is routed to the originating case record. It displays under the Messages section of the Communications subtab. Go to Setup > Company > Enable Features > CRM > Capture Email Replies.

Now messages sent to your support email address are automatically forwarded to the NetSuite address and logged as cases to your account.

If you use NetSuite OneWorld, you can use different case capture email addresses for each subsidiary, as well as setting up subsidiary-specific case profiles. For more information, see Setting Up Your Mail Server for Email Case Capture in NetSuite OneWorld.

If a support message is sent from a customer with a company record, a copy of the case record is saved to the record. If there is no matching company record, the case will be saved to the Anonymous Customer record. Anonymous customers are specified in case profiles under the General subtab.

When an email becomes a case, you can choose to automatically notify the support rep when they are assigned to that case. Go to Setup > Support > Support Preferences > Notification, in the Assignment column, check the Notify Assignees box.

Note: Email messages over 10 MB in size cannot be accepted as cases.

Troubleshooting Email Case Capture

If cases are not being created as expected, send a test email message from your email client to the NetSuite address. This address is located at Setup > Support > Preferences > Support Preferences > Inbound Email.

If a test case is created from this email message, the problem is probably with your email forwarding setup.

If a test case is not created from the email message sent directly to the inbound email address, contact NetSuite Customer Support.

If test cases are being created in your NetSuite account from spam email messages, filters must be applied to the Exchange server. Your IT department or mail sever administrator can set up these filters. They must filter the Exchange server to exclude messages that include more than three addresses in the **To** field.

Important: You cannot send email generated from within NetSuite to the inbound case capture address due to system security precautions. This includes email created from within the Communication subtab of a record, and scripts, including workflows.

Email Case Capture Fields

The following fields are populated when a case is created from an email:

Field on Case Record	Information from Email
Subject	The subject field of the email message.
Date Created	The date the email message was received by NetSuite.
Company	If an existing company record matches the one used by the sender of the support message, this company is used to populate the field. If no matches are found, the default Anonymous Customer record is used instead. This also applies if a contact is associated with two companies.
Contact	If the email address of the message matches the email address of a contact tied to the company, that contact appears in this field.
Email	The email address the message was originally sent from.
Message	Text of the message in the email

Field on Case Record	Information from Email
Status	The default setting is Not Started.
Origin	Automatically sets to Email.
Priority	The default setting is Medium.
Assigned To	Sets based on the rules and territories you set at Setup > Set Up Case Territories

Using Variable Envelope Return Paths

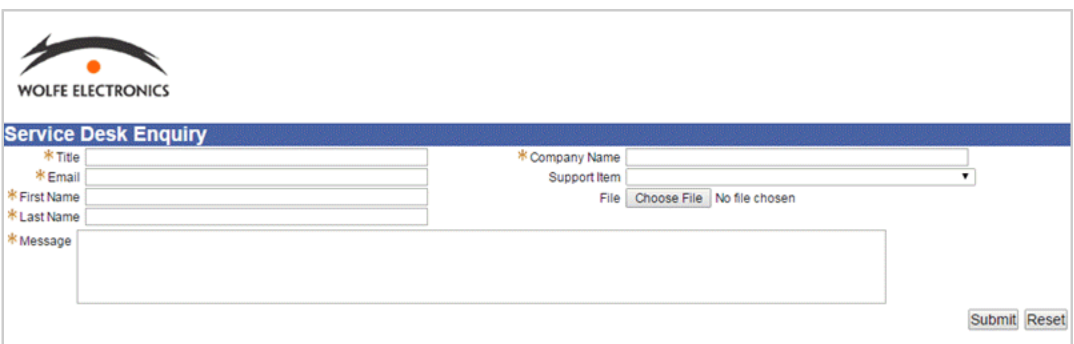
With the Capture Email Replies feature, email sent from lists, records, and transactions automatically saved to the contact record. It also saves to the record of the associated entity before being sent to your login email address. This is accomplished through the use of variable envelope return paths, or VERPs.

VERPs route email messages to NetSuite servers so that they can be recorded in NetSuite and then forwarded to the recipient. The sender and recipient addresses are not changed or hidden by VERPs. The use of VERPs is considered a best practice measure and complies with the mass email policies of large ISPs and email providers. No setup is required for VERPs.

Online Case Forms

Online case forms help customers contact you with enquiries, and help your support team resolve problems and offer customers the best service possible.

Online forms are created using either NetSuite default form template or a custom HTML template you upload. You can link to the form from your website or from the Customer Center.



Creating an Online Case Form

When customers click the link to your online case form, they enter information relating to the question or issue they have. They may also upload images or documents to aid support reps in resolving their case. When a customer clicks Submit, a case record is automatically generated in your account and populated with the supplied customer information.

To create an online case form:

1. Go to Setup > Support > Online Case Forms > New.
2. Click **Default Form Template** to use NetSuite default format for an online form.

You can also click **Custom HTML Template** if you have uploaded a template for this form to the File Cabinet. For more information about custom HTML forms, see Custom HTML Form Templates.

3. Enter a title for this form.

   This title appears at the top of the form.

4. If you are creating a form using the default template:
   - Enter a message in the Message field that your customers will see at the top of the form.

     This message can include up to 500 HTML characters.
   - In the **Detail Message** field, enter a message you would like to appear at the bottom of the form.

     This message can include up to 4000 HTML characters.

5. If you are using a custom HTML form template:
   - Select the template you are using for this form.
   - To have NetSuite add field labels to your form, check the Include Field Labels box.

     This adds labels based on the tags in your custom template such as Name, Company or Subject.

6. Check the **Enable Online** box to be able to link to this form from a website.

7. On the **Select Fields** subtab, in the **Field** column, select a field you would like to include on the form.

   > **Note:** To allow customers to upload files through the form, add the **File** field.

   a. In the **Label** column, you can edit the name of the field as it appears on the form.
   b. In the **Section** column, select the subtab you want this field to appear on. See Customization > Forms > Subtabs
   c. In the **Help** column, enter any text you would like to appear below the field to assist your customers when completing the form.
   d. In the **Width** column, enter the width for the field.
   e. To make a field a required field, check the box in the **Mandatory** column.
   f. Check the **Search** box if you do not have duplicate detection enabled on the **Set Up Workflow** subtab. (Step 8.)

      NetSuite will index that field against existing records and suggest matches.

      If the information matches another record, the new information is appended to the existing record. You can determine what NetSuite does when it finds duplicate information in an existing record using the **Handle Duplicate Records** field.

      This option is required for **Contact First** and **Last Name** fields. You can also search for duplicated company names, email addresses, phone numbers and information entered in custom fields.
   g. In the **Hide** column, check the box next to any field you want to hide on the form.

      Hidden fields are useful if you pass information into the form through the URL in the link. For more information, see Linking to Online Forms.
   h. Check the box in the **Select** column if you want your customer to choose from a dropdown or popup list in this field.
   i. Click **Add**.
   j. Repeat these steps for each field on the form.
   k. Use the **Move Up**, **Move Down**, **Move to Top** and **Move to Bottom** buttons to change the order fields appear on your form.

l. If you are using the default template, click the **Detail Message** subtab, and enter a message to appear at the bottom of your form.

8. Click the **Set Up Workflow** subtab.
    a. Click the **Set Up Workflow** subtab.
    b. Click the **Create Customers as Companies** box if you want new contacts to be created as a company rather than as an individual. This is true if there is no match to an existing record.
    c. Select the profile from the **Default Case Profile** field that you want to assign to cases created through this online case form. You can also set the profile on case forms. Add the profile as a parameter to the form URL or allow those submitting the form to set the profile manually.

       Profiles determine the following:
       - the from name and from email address shown on notifications sent for this case
       - the notification templates used when the case is created, updated, or closed

       You can create new case profiles at Setup > Support > Case Profiles > New
    d. In the **Set Case Origin** field, select the origin you want to associate with case records created through this form.

       You can create new case origins at Setup > Support > Case Origins > New..
    e. Complete the **Redirect to URL** field with the URL you want customers redirected to after completing the form. This is a required field.

       Your Web store home page URL appears here by default.
    f. in the **Handle Duplicate Records** field, select an action to take if a duplicate record is detected.
    g. Check the **Use Duplicate Detection Criteria** box if you want to use the standard criteria set in the company setup page.
    h. Select a template from **Send Auto-Reply Email** if you want to send an auto-generated reply to the sender when the form is submitted. This requires the **Marketing Automation** feature to be enabled. See Setup > Company > Enable Features

       To create email templates, see Documents > Templates > Email Templates > New.
    i. Add a subject for the auto-generated message in the **Subject** field
    j. From the **Notification Template** field, select which template to use when notifying people listed in the **Email Address of Recipients** field. If you want to create a new template choose **New** from the dropdown menu
    k. In the **Email Address of Recipients** field, enter the email addresses of those to be notified when a customer completes and submits the form. Enter the full email address separated by commas or semicolons.
9. Click the **Set Up Appearance** subtab.

> **Note:** Many of the options listed below do not appear on custom HTML template forms. If you are creating an online form with a custom HTML form template, include style and appearance settings in the HTML code of the template.

    a. Choose how many columns you want the form to be displayed in.
    b. Select a color theme for the form.
    c. Select a font for the form.
    d. Check the **Unlayered Sections** box, if you want your form to appear without tabbed sections.

e. Choose where to place the buttons on the form from the **Button Alignment** field.

f. Select a logo to place at the top of the form. Logos should be uploaded to the images folder in the **File Cabinet**. See Documents > Files > File Cabinet

10. If you intend to use SuiteScript features, click the **Custom Code** subtab to:
    - Choose a JavaScript file that contains your desired scripts in the Script File field.
    - In the Page Init Function field, select a script from your script file that is called when the form is first loaded.

      If you are using an online HTML form template for this form, include this script in your HTML template file.
    - In the Save Record Function field, select a script from your script file that is called when the form is saved.
    - In the Validate Field Function field, select a script to call from your script file when a field on the form is changed.
    - In the Field Changed Function field, select a script to call from your script file when a change to a form field is accepted.
11. Save the form.

After you save the form, click Preview Form to view your form.

Now customers can enter support cases on your website, and case records are automatically created in NetSuite.

After you complete an online case form, an employee with the Store Manager, Intranet Manager, or Administrator role can publish the form using an information item.

To link to the form, click the External subtab on the form record. You can use the provided URL to link to this form on your website. When you link to the form, the form pops up in a new window.

Cases created using the Online Case Form are given the status of Not Started by default.

If you use NetSuite OneWorld, see Setting Up Online Case Forms for NetSuite OneWorld for information on setting up online case forms to track subsidiaries.

Linking to Online Forms

You can link to an online form from your website or from an email or template. The form URL is found on the External subtab of the form record. Use the URL in the Publishable Form URL field when linking from an external website. Use the URL in the Internal Form URL when linking to a form from a NetSuite website or intranet site. Also use this URL when linking to a from from the Partner or Vendor centers.

You can customize the URL of your linked form so that certain information can automatically be sent to NetSuite after the form is submitted. These are called parameters and the information sent to the relevant field in NetSuite cannot be modified by customers.

> For example, Wolfe Electronics want to include a link to the case form from one of their microsites. After setting up the new case origin type, they include the parameter &origin=Cameras to track the case origin from their camera business. (Case origin types are located at Setup > Support > Case Types.) Now when the case form is submitted, “Cameras” is automatically entered in the Case Origin field on the form. This field can be set to hidden if required.

To add this parameter to the publishable form URL, add the &origin=Cameras parameter to the end of the URL. By default NetSuite adds a number of parameters to the URL, so be careful not to overwrite these when adding additional parameters.

Below is a list of supported parameters and example text for each parameter.

Field	Tag and Example
Company Name	&companyname=Global Distributing
Email	&email=john@example.com
Message	&incomingmessage=This is the message.
Subject/Title	&title=Problem With Service
Subsidiary	&subsidiary=UK
Case Origin	&origin=Online
Case Type	&category=Service Problem
Phone Number	&phone=555-555-5555
Contact First Name	&firstname=John
Contact Last Name	&lastname=Doe
Contact Middle Name	&middlename=Lee
Start Date	&startdate=11/11/2005
Start Time	&starttime=12:00 pm
Support Issue	&issue=Issue
Support Item	&item=Item

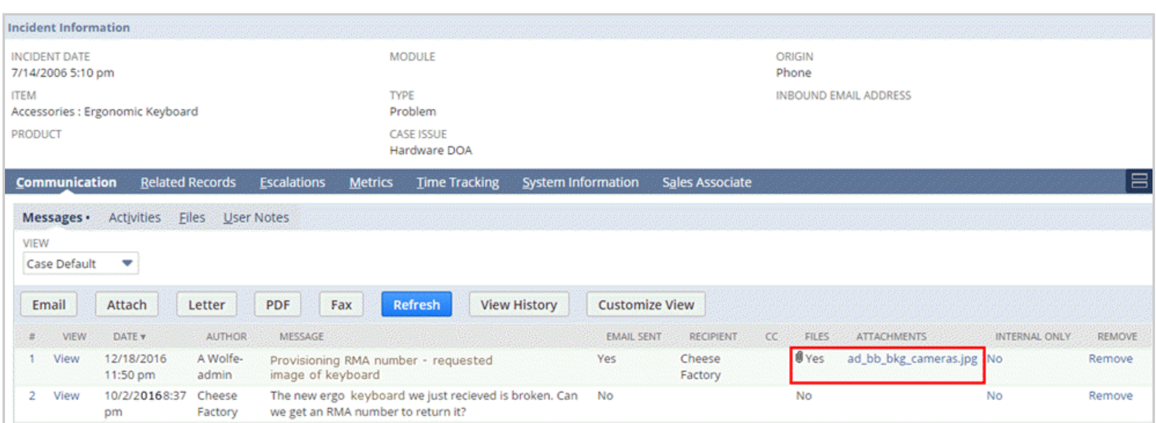
Uploading Files Through an Online Case Form

You can set up your online case forms to allow customers to upload files, such as screenshots, that help your support reps resolve cases. Uploaded files can be up to 10 MB in size.

When a file is uploaded through an online case form, the file is attached to the case record in the following places:

- In the Attachments column on the Communication subtab of the case record
- On the Files subtab
- On the Attachments subtab of the message record

  You can view the message record by clicking View next to the message on the Messages subtab.



Files uploaded through online case forms are saved in the File Cabinet in the Attachments Received folder. This folder contains subfolders named for the customer record who filed the case. If the file is too large or of an unsupported type, the case is saved, but the file is not uploaded.

To allow files to be uploaded through an online case form:

1. Open the online case form record.
2. On the **Select Fields** subtab, in the **Field** column, select **File**.

   You can also optionally do the following:

   - Enter a new label for the field.
   - Choose which section of your form the field will appear on.
   - Change the field width.
3. Click **Add**.
4. Click **Save**.

   The **Choose File** field will now be added to the case form as shown below.

Custom HTML Form Templates

By default, online case forms match the style of your NetSuite website. However, with online HTML form templates, you can customize your online forms and match the style of your online forms to your website.

Online form templates are HTML documents you create outside of NetSuite and then upload to your NetSuite File Cabinet for use with online forms.

> **Note:** You can use HTML form templates only if you have the Marketing Automation feature enabled. Administrators can enable this feature at Setup > Company > Enable Features > CRM.

Creating Online HTML Form Templates

When you create an online form template you determine how the fields are arranged. You also decide which fields to include on the form, and the style of the page.

You must include the following elements in the HTML code:

- **<NLFORM>** and **</form>** tags
- **<HTML>** and **</HTML>** tags
- **<HEAD>** and **</HEAD>** tags.
- tags for each field you want to include

- a button your customers use to submit the form

> ⚠ **Important:** Do not use multiple instances of the same NL tag in a custom template, for example (<nlfile>). This will result in an error when the user submits the form.

In the body of your template, you use field tags to place the fields that appear on your form.

The following table includes all of the standard field tags used in online HTML customer forms. These include all of the default fields on the case record:

Field	Tag
Company Name	<NLCOMPANYNAME>
Name	<NLENTITYID>
Email	<NLEMAIL>
Message	<NLINCOMINGMESSAGE>
Subject/Title	<NLTITLE>
Subsidiary	<NLSUBSIDIARY>
File Upload	<NLFILE>
Case Origin	<NLORIGIN>
Case Type	<NLCATEGORY>
Contact First Name	<NLFIRSTNAME>
Contact Last Name	<NLLASTNAME>
Contact Middle Name	<NLMIDDLENAME>
Phone Number	<NLPHONE>
Incident Date	<NLSTARTDATE>
Incident Time	<NLSTARTTIME>
Support Issue	<NLISSUE>
Support Item	<NLITEM>

To determine the tags to use for custom fields, an administrator can go to Setup > Entity Fields. Hold your mouse pointer over the field you want to include in your template. At the bottom of the page, the Web address for this page appears in your browser. At the end of the address is the field tag. For example, the tag may look like this:

```
<NLCUSTENTITY2>
```

When you create your online form, you can choose to have NetSuite insert field names into your form. Or, you can choose to name the fields on the form with text in your template.

Your form should also include a button your customers use to submit the form to your NetSuite account. The HTML code for this button is:

```
<input type="submit" value="Button Text">
```

You can substitute text in the button by changing the value in your code. For example, if you want the text in the button to read **Submit Form**, the code would be:

<input type="submit" value="Submit Form">

Below is a basic representation of an acceptable HTML form template that includes field labels in the HTML code:

```
<HTML>
<HEAD>
</HEAD>
<NLFORM>
<p>Please enter the name of your company: <NLCOMPANYNAME></p>
<p>Enter a contact email address: <NLEMAIL></p>
<p>Enter a title for the message: <NLTITLE></P>
<p>Enter your message here: <NLINCOMINGMESSAGE></p>
<p><input type="submit" value= "Submit Form"></p>
<p> Attach a file here: <NLFILE> </p>
</form>
</HTML>
```

You can include labels for each field in the HTML code in your template, or NetSuite can insert default labels for each field. The example above includes labels in the HTML code that let customers know what information should be entered in each field.

Including Images in Online Forms

You can include images in your online HTML forms if you have uploaded them to the File Cabinet.

To include images in your form:

1. Go to Documents > Files > File Cabinet > Images and access the **Images** folder.
2. Click **Edit** next to the image you want to include in the form.
3. Make sure the **Available Without Login** box is checked.
4. Copy the URL information from the **URL** field.
5. When you add the image URL to the template, enter **https://system.netsuite.com** followed by the information from the **URL** field.

   The image URL should match the following format:

```
<p><IMG SRC="https://system.netsuite.com/core/media/
media.nl?id=20&c=ACCT83022&h=9087c4a3c3d4b23aba42"></p>
```

After you have prepared your template file, upload it to the File Cabinet.

Uploading Custom HTML Form Templates

Custom HTML form templates are saved by default in the Marketing Templates folder in the File Cabinet. To change the folder you use to store your templates, an administrator can go to Setup > Company > Email Preferences. Click the Templates subtab and select another folder in the Template Folder field.

To upload an HTML template:

1. Go to Documents > Templates > Template Files
2. Click **Templates** and then **Marketing Templates**.

3. Click **Add** File.
4. In the Choose File window locate your HTML template on your hard drive.
5. Select the file.

   Make sure the file is an HTML file before adding it to the File Cabinet.
6. Click **Open**.

After you have uploaded your HTML template to the File Cabinet, you can create a template record.

Creating a Custom HTML Template Case Form

Use the following steps to create a custom HTML template case form.

To create a custom HTML template case form:

1. Go to Setup > Support > Online Case Forms.
2. Select **New**.
3. Select **Custom HTML Template**.
4. Select your custom HTML template from the **Template** field.

   > **Note:** If this is the first time you have used your custom HTML file, note the following. You must convert it into an online form template before it appears in the template list. To create the online template, select **New** from the list. Name the template, and then locate your HTML file from the Marketing Templates folder in File Cabinet. For more information on online form templates, see the help topic Online Form Templates

5. Ensure that the selected fields match those of your custom HTML template.
6. Click **Save**.

When you create your custom form and template record, check **Include Field Labels** if your template includes the field names for your form. When you check this box, NetSuite adds the field name that matches each tag.

When your online case form is complete, your support team can start handling cases entered using your form.

Help Desk

The Help Desk feature enables you to manage internal cases that are both submitted and answered by employees.

To enable the Help Desk feature, go to Setup > Company > Setup Tasks > Enable Features > CRM. Click the CRM subtab, and then under the Support section, check the Help Desk box.

When you enable this feature, the following is added to your account:

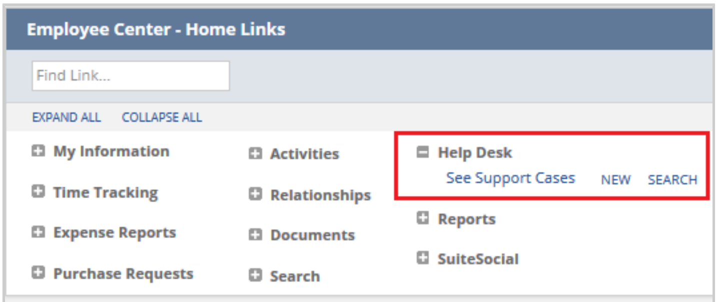
- A **Help Desk** check box is added to case records.

  This box designates the case as internal. When this box is checked, help desk employees can search for or assign rules and territories based on cases. For information, see the help topic Creating Case Rules.

  Cases designated as Help Desk are not included in case reports.
- Help desk cases are added to the Employee Center.

Employees with no access to case records should log in to the Employee Center. They must click **NEW** next to **See Support Cases** under the **Help Desk** heading. They can also edit previous help desk cases and view updates on cases.

- A Standard Help Desk Form is available for customization at Customization > Forms > Entry Forms.
- This is the form used by employees entering help desk cases in the Employee Center.



Customizing Case Forms

You can customize both the case forms support reps use to enter cases and the forms customers use to submit cases through the Customer Center. By customizing case forms, you can add fields to capture extra information, or remove or hide fields that your company does not need.

To customize the case form support reps use to enter cases:

1. Go to Customization > Forms > Entry Forms.
2. Click **Customize** next to **Standard Case Form**.
3. Create a name for this new custom case form.
4. To hide a subtab, field or list, clear the box in the Show column on the subtabs at the bottom of the page.
5. To add a custom field you created, click the **Custom** subtab under the **Fields** subtab.
6. Click **Save**.

To customize the case form customers use in the Customer Center:

1. Go to Customization > Forms > Entry Forms.
2. Click **Customize** next to Standard External Case Form.
3. Create a name for this new custom case form.
4. To hide a subtab, field or list, clear the box in the Show column on the subtabs at the bottom of the page.
5. To add a custom field you created, click the Custom subtab under the Fields subtab.
6. Click **Save**.

Customizing Support Notification Email

When you create or make changes to case records, you can set up automatic email notifications that are sent to customers and support reps. Standard templates are used by default for these notifications.

These can be edited by going to Setup > Company > Email > System Email Templates. You can also create custom templates for each type of notification in the following scenarios:

- to customers when a new case is created
- to customers when their case has been updated or replied to
- to customers when their case has been closed as a result of the all associated issues being closed
- to support reps when they have been assigned to a case
- to support reps when a case they are assigned to has been updated
- to employees when a case has been escalated to them

For example, Wolfe Electronics support manager changes the font and text size of the standard notification sent customers when a new case is created. The manager also adds the company logo and changes the wording of the standard message.

Important: Assignment notifications are not sent when the logged in user is the new assignee. Also, update notifications are not sent when the logged in user is the assignee. You can work around this limitation by creating a SuiteScript that sends a notification to the logged in user after the case is submitted.

There are three steps to setting up custom notifications:

1. Creating your template.
2. Uploading your template.
3. Selecting the custom template at Setup > Support > Support Preferences..
4. If you use NetSuite OneWorld, set the notifications to use for each subsidiary.

   For more information, see Setting Subsidiary-Level Support Preferences.

Note: Automatic email notifications do not affect the initial response time. For more information, see Performance Metrics for Support Cases.

Creating an Email Template

Email templates can be created either outside of NetSuite in a word processing application or entered directly in the Template field of email template records. If you create an email template outside of NetSuite, save your template as a Plain Text (.txt) file.

Email templates can be personalized as scriptable templates that include information from NetSuite records. For more information, see the help topic Scriptable Templates.

Uploading Your Email Template

You can compose a message in the Template field on the email template record if your template file was not prepared outside of NetSuite.

To upload your email template and create a template record:

1. Go to Setup > Company Management > System Email templates.
2. Click on **New Template**.

3. Enter a name, subject, and description for this template.
4. On the **Template** subtab:
   - If you created your template outside of NetSuite, click the New icon next to the **Template File** field. In the File window, select the file you want to upload, and click Save.
   - To compose your template text here, enter your message in the **Template** field. You can use the Insert Field tool to automatically insert fields that pull information from fields on the case record.
5. On the **Restrict Access** subtab, you can designate this template as private. This ensures that only you can use it, or you can select a group to have exclusive access to the template.
6. Click **Save**.

Your notification template is ready to be assigned to a type of notification. You can set these preferences on the Notification subtab when you set up support preferences at Setup > Support > Preferences > Support Preferences.

Setting Up Customer Support in NetSuite OneWorld

If you use NetSuite OneWorld, you can configure NetSuite to manage the needs of your global support organization. With these tools, you can tailor the support experience for each subsidiary.

This includes:

- entering a main support From email addresses for each subsidiary
- maintaining notification message templates for each subsidiary
- using different inbound email addresses for each subsidiary with the Email Case Capture feature
- configuring and branding online case forms
- tracking cases by subsidiary
- restricting support rep visibility to cases based on subsidiary
- setting up case territory/rules so cases are routed to reps based on subsidiary

The Subsidiary field on the case record lets you track cases by subsidiary. This lets you restrict support reps access to those cases in their subsidiaries and also to brand your forms for each subsidiary. After you save a case, the customer's subsidiary is shown in a read-only field on the case.

To configure customer support for your organization, complete the following steps:

1. Set your support preferences at Setup > Support > Preferences > Support Preferences. These company settings are set as the default for subsidiary-level preferences. See Setting Company-Level Support Preferences.
2. Set the support preferences for each subsidiary on subsidiary records. See Setting Subsidiary-Level Support Preferences.
3. Configure case forms for each subsidiary. See Setting Up Case Forms for NetSuite OneWorld and Setting Up Online Case Forms for NetSuite OneWorld.
4. Customize support rep roles to restrict reps access to the subsidiaries they are responsible for. See Customizing Support Rep Roles for NetSuite OneWorld.
5. Create case rules and territories that route cases to reps based on subsidiary. For more information, see Creating Case Rules and Territories Based on Subsidiary.

6. If you use the Email Case Capture feature, set up your Exchange server with the inbound email address for each subsidiary. See Setting Up Your Mail Server for Email Case Capture in NetSuite OneWorld.

Setting Company-Level Support Preferences

The support preferences at Setup > Support > Preferences > Support Preferences are used as the defaults for subsidiary-level preferences.

If you want to restrict support rep access to cases by subsidiary, you can also set the Restrict Cases Based on Subsidiary preference.

To set company support preferences:

1. Go to Setup > Support > Preferences > Support Preferences.
2. On the **General** subtab, check the **Restrict Cases Based on Subsidiary** box to restrict support reps access to support cases based on their subsidiary.
3. Click the **Notification** subtab.
4. Set the templates you use for support notification.

   For information on support preferences, see Setting Customer Service Preferences.
5. Click **Save**.

After you set the company support preferences, you can set preferences for each subsidiary.

Setting Subsidiary-Level Support Preferences

Customer support preferences for subsidiaries are set on subsidiary records.

For each subsidiary, enter the company name and the From email address to appear in the From field on email communication sent to customers. You can also create email notification templates for each subsidiary.

You can choose an anonymous customer record to use as a placeholder when cases are entered by individuals who do not have matching customer records. By default, an anonymous customer record is created for each subsidiary.

Subsidiary-level preferences take precedence over the preferences you set at Setup > Support > Preferences > Support Preferences. If you do not set a preference for a subsidiary, the company-level preference is used for that subsidiary. If the subsidiary preferences match the company preferences, when you change the company preference, the subsidiary preference is automatically updated.

To set subsidiary support preferences:

1. As an Administrator, go to Setup > Company > Classifications > Subsidiaries.
2. Click **Edit** next to the subsidiary you want to set support preferences for.
3. Click the **Preferences** subtab.
4. Under the **Preferences** subtab, click the **Support** subtab.
5. From the **Default Case Profile** list, select the required case profile.

   For information on setting up case profiles see, Creating Case Profiles.
6. Click **Save**.

Setting Up Case Forms for NetSuite OneWorld

By default, the Subsidiary field appears on the Standard Case Form and the Standard Help Desk Form. You must add the Subsidiary field to the Standard External Case Form and other custom case forms you want the field included on.

To add the Subsidiary field to a form:

1. Go to Setup > Customization > Forms > Entry Forms.
2. Click **Customize** next to the form you want to add the field to.
3. Verify that the **Form is Preferred** box is checked.
4. On the custom form page, click the **Fields** subtab.
5. On the **Main** subtab, check the box in the **Show** column next to Subsidiary.
6. Click **Save**.

When a case saves through the Customer Center or the My Account page of your Web site, the customer's subsidiary appears on the case.

Setting Up Online Case Forms for NetSuite OneWorld

By default, the Subsidiary field is also included on online case forms as a hidden search field. You can set the value of the subsidiary field on the form by including the **subsidiary** parameter in the URL. You can also choosinge a default subsidiary on the Set Up Workflow subtab of the online case form.

If the field remains hidden on the form, the subsidiary will not be seen by the customer submitting the form.

The Default Subsidiary preference is used to define the appropriate subsidiary to associate with a case when no subsidiary is explicitly set on the form. It determines the following:

- **Which customers are considered when NetSuite searches to determine if there is an existing record for the person submitting the form.**

  NetSuite only considers the customers associated with the subsidiary set on the form when determining if there is an existing record.

  For example, you set the **Handle Duplicate Records** preference to create a new customer record when no match is found. NetSuite creates the record and associates it with the subsidiary set on the form. If no subsidiary is set on the form and no default subsidiary is set, the new record is associated with your root parent subsidiary.

  Another example, there is no matching record and the Handle Duplicate Records preference is not set to create a new record. NetSuite associates the new case with an anonymous customer record. If a subsidiary is set, the case is associated with that subsidiary's anonymous customer placeholder.
- **The subsidiary set on the case record that is created.**

If a subsidiary is not set through the form or through a URL parameter, the default subsidiary is applied. If a matching customer is not found for the case, the anonymous customer placeholder for that subsidiary is used. In case profiles, the value in the subsidiary filter takes precedence over that entered in the default subsidiary field on the online case form.

To set up an online case form:

1. Go to Setup > Support > Case Management > Online Case Forms > New.
2. On the **Select Field** subtab, select either the **Company Name** field or the **First** and **Last Name** fields and mark them mandatory.
3. Click the **Set Up Workflow** subtab.
4. In the **Default Subsidiary** field, select the subsidiary you want to associate with cases submitted through this form.
5. Set other options on the form. For example, you might put a logo on the form that is specific to a subsidiary.
6. Click **Save**.

For more information on online case forms, see Online Case Forms.

Customizing Support Rep Roles for NetSuite OneWorld

You can specify that support reps see only those cases in their subsidiaries. Go to Setup > Support > Preferences > Support Preferences. Check the **Restrict Cases Based on Subsidiaries** box.

Then, customize the support rep role and select the subsidiaries the rep is responsible for. If you do not select subsidiaries on the role, any support rep assigned that role is restricted to the subsidiary on the reps' employee record.

For more information on customizing roles, see the help topic Customizing or Creating NetSuite Roles.

Creating Case Rules and Territories Based on Subsidiary

After you customize your support rep roles, set up sales rules and territories so that cases are routed to support reps in the proper subsidiary.

You can create rules for each subsidiary. You can base your rule on the Subsidiary field, create territories for each subsidiary, and then assign the support reps responsible for those subsidiaries.

Important: If you do not create case rules and territories based on subsidiary, support reps could be assigned cases that they do not have access to. These cases would not appear in lists, saved searches, reports, or KPIs.

For information, see Assignment Rules & Territories.

Setting Up Your Mail Server for Email Case Capture in NetSuite OneWorld

If you use the Email Case Capture feature, an inbound email address for each subsidiary can be set up using the case profiles feature. See Creating Case Profiles.

When you have a case profile for each subsidiary, use **NetSuite Inbound Email Address** found on the **General** subtab of each subsidiary's case profile. This is the forwarding address that you redirect your company's subsidiary support email address to.

For example, on your company mail server you would forward `support.emea@example.com` to the NetSuite Inbound Email Address of the subsidiary. If the company's account ID was 123456, the email address would look something like `cases.375xxx.248xx@123456.email.netsuite.com`. This enables cases to be automatically captured to your NetSuite account.

You may also want to restrict the visibility of the case profile to just the selected subsidiary. In which case, select the subsidiary from the **Subsidiary filter** in the case profile record. For further information on server-side setup requirements when using email case capture, see the help topic Prerequisites for Setting Up Email Case Capture.

Support Glossary

Case: A record created to document a problem, question, or other feedback from a customer. Case records can be assigned to support reps, who can use the case record to respond to the customer by email. Reps can also use case records to document a support phone call. Cases are customer-facing records, whereas issues, are internal company records.

Category: A division of customer and vendor records into groups you specify in NetSuite. Categories help organize records to make it easier to manage your business. Use Accounting Lists to set up customer, vendor or budget categories. You can use Web Site Categories in a Site Builder web store to organize products for sale online. To set up categories for Site Builder, go to Commerce > Site Builder > Content Management > Categories.

Center: The set of tabs each role has access to. For example, Administrators work in the Classic Center, which has the Lists, Transactions, and Reports tabs. Accountants work in the Accounting Center, which has the Customers, Vendors, Payroll and HR, and Financial tabs.

Class: A way to separate and track records such as financials, transactions, and employees. For example, a janitorial service wants to track household and commercial accounts separately. They set up a class for each of these account types. Then, they can track the financial performance of each class over any period of time.

Crosslinks: Crosslinks enable you to navigate between pages centered around the same record type rather than access these pages through menus. Typically crosslinks appear at the top of record pages. Common examples of crosslinks are Search and List.

Customer: The person or entity that buys goods from you or your business.

Custom form: A form you can modify based on the needs of your business.

Customer Center: A user-restricted role that has permission to:

- See current orders, estimates and transaction histories.
- Enter an order.
- Make payments on open invoices.

Customize menu: This is a user interface element in NetSuite. The Customize menu is located in the upper-right corner of all customizable records.

Department: A division or section of your business. Use departments to separate and track records such as financials, transactions and employees. For example, you can create a department for each team of employees dedicated to a certain area of business. Then, you can track income and expenses by each department over any period of time.

Disclaimer: A statement or explanation of your company's policies and terms. You can use a disclaimer to familiarize your customers with important information about your company. In NetSuite, you can print a disclaimer on custom forms.

Drill down: Click a link in a list, report, or register to view, or edit at a more detailed level. For example, you can drill down on a check by clicking the date of the check. Then, you can see when it was written or when it cleared the bank.

Dynamic group: A group of relationship records created from a saved search. Because the set of criteria for the group is saved, new records that fit the criteria of the group are automatically added to the group.

Employee Center: A user-restricted role that has permission to:

- See approved and unapproved expense reports, purchase requests and time reports.

- Enter expense reports, purchase requests and time.
- Edit unapproved expense reports and purchase requests.

Entity: Entity records include those records that define people or organizations such as company, contact, vendor, and employee records.

Field group: A collection of fields grouped together into a logical group. You can use a field group to organize fields on a form.

Field-Level Help: A popup window containing specific information about a field on a NetSuite page. To read field-level help, click the label next to the field.

Handler: The action or process performed by the business events framework in response to a business event that occurs on a record.

For example, when a sales order is approved, the Automatic Location Assignment handler is called and the process to assign locations automatically is initiated.

Internal ID: Records and forms in NetSuite each have a unique internal ID. The internal ID is useful when writing SuiteScript and when referring to custom records and custom fields. Internal IDs are also useful for understanding the default URL parameters in your web store. You can set a preference to always view internal IDs for records on lists. To set the preference, go to Home > Set Preferences. On the General subtab in the Defaults section, check the Show Internal IDs box.

Issue: A record used to document a product problem, or defect that needs to be resolved. This is an internal-facing record, as opposed to a case, which is a customer-facing record.

KPI: Key Performance Indicators are quantifiable measurements that reflect the critical success factors of an organization. They help you define and measure progress toward organizational goals. You can add up to three graphical meters to your dashboard that describe key performance indicator (KPI) information. For example, you can set up a KPI meter for your Sales indicator. Your meter will show your date comparisons graphically and flag your threshold values.

Lead source: A name or code that designates how a lead, prospect, or customer was referred to your company. If you use the Marketing Automation feature, your list of lead sources consists of the names of campaigns. If you do not use the Marketing Automation feature, you can create lead sources. Go to Setup > Sales > Setup Tasks > CRM Lists > New. You can select a lead source on a customer, lead, or prospect record.

Login access: Access to individuals and companies who need to enter and view information in a NetSuite account. Each individual can have a different level of access different roles can be assigned on each individual record.

Message field: A field where you can select a personal message to appear on invoices and other forms you send customers and vendors. A field that appears on the Checkout, Welcome and Catalog pages of your NetSuite website. Use the store message fields to provide general information to customers who visit your website.

Note: There are two types of notes in NetSuite: system notes and user notes. System notes are generated automatically when changes are made to a record. User notes are created manually to keep track of information about a record.

Partner: A partner is an outside company you have a business relationship with who is not a customer or a vendor.

Partner Center: Partners can log in to NetSuite to update their profiles, view reports, and set up promotion codes.

Password: The secret code that you, your employees, or others use to gain access to NetSuite. Password requirements are affected by the password policy in place, the role assigned to the user, and access to secure information. For more information, see the help topic NetSuite Password Requirements. For security reasons, passwords are not included in email notifications. Contact users directly by telephone or regular mail to assign passwords.

Plug-In: A plug-in is functionality, defined by an interface, that can be customized. After it is installed, a third party can override the plug-in's default logic with logic that suits its specific needs. For more information, see the help topic Custom Plug-in Overview.

Portlet: A dynamic data display window in a NetSuite subtab or dashboard. Some portlets provide direct access to raw data. Others display data that has been synthesized into critical business metrics, such as key performance indicators (KPIs), performance scorecards, trend graphs, and report snapshots. Some other portlets let you display data from website RSS feeds.

Preferences: Options available in NetSuite to make the application function according to your business needs. Preferences are unique to each feature area and are based on your role. You can set preferences that only affect your personal experience of NetSuite, such as time zone, language, drop-down menus, and color theme. Depending on your role, you may also have permission to set company-wide preferences that affect areas such as accounting, invoicing, and inventory management.

QuickView: This is a user interface element. A QuickView is a summary view of a record. For some record types, the QuickView also contains buttons that allow users to make changes to the record.

Rank: The position of an item in a list of similar items. In a region, each location can be given a rank. The rank determines the order in which locations are assigned to sales order lines. This is true when the optimal fulfillment strategy is set to Highest Ranked Location.

Record status: The status of all transaction records appears to the right of the record title.

Reminders: The reminder list automatically appears on your NetSuite Home page each time you log in. It displays various matters of business to be taken care of. You can customize the list to display items specific to your daily routine, or you can turn it off completely. In NetSuite, Reminders can also be event reminders, which pop up at the time you designate on event records.

Role: A set of permissions that gives access to specific areas of your data to employees, customers, partners, and vendors. Standard roles can be assigned to employees. User-restricted roles provide access to a limited set of tasks and a different Help Center, can be assigned to employees, customers, partners, and vendors.

Shortcut: A link to your most frequently used pages in NetSuite. On your home page you can customize shortcuts to link to the tasks you perform most often. You set them up by clicking the star icon on the tab to the left of the home tab.

Solution: An answer or recommendation to a common customer question or problem. Solutions are organized under topics and published as a knowledge base. They can also be attached to case records for quick responses to customer messages.

SuitePeople: A comprehensive and integrated Human Capital Management (HCM) solution. SuitePeople enables Human Resources professionals to manage employees within NetSuite, thus eliminating repetitive and manual processes with one source of where employee data is kept. At the same time, SuitePeople empowers employees and managers with self-service functionality to complete most everyday tasks. SuitePeople leverages NetSuite to provide customizable workflows tailored for how you do business.

SuiteScript: SuiteScript is the scripting platform for NetSuite solutions. It includes custom code capabilities that operate within the client/browser framework. It also includes server-side scripting capabilities that can be scheduled or event-based and operate within the server framework.

Support manager: A standard role that has permission to:

- Set up case assignment and escalation
- Create online case forms

- View and edit issue and case records
- View support and sales reports

Support person: A standard role that has permission to:

- View and edit issue and case records
- View case and issue reports

TeleVantage®: Software-based phone system created by Artisoft® that enables you to use a non- TAPI enabled telephone with a NetSuite.

Topic: A heading or category to use for organizing solutions in a knowledge base.

User: A customer, contact, partner, vendor, or employee who is assigned access to the data in your NetSuite account. The level of access depends on the role you assign to the user.

User-restricted role: Gives customers, employees, and vendors external access to your account so they can view or enter their transaction information. When logged in with these roles, users can complete only a limited set of tasks. For example, the Employee Center role lets employees enter and view time reports, expense reports, and purchase requests.

Vendor Center: A user-restricted role that has permission to:

- View purchase orders.
- View accounts payable registers.
- View non posting registers.

Working With Cases

When a customer reports an issue, question, or suggestion to your business, you create a case in your account. That is added to the cases list, and is the beginning of the case workflow.

Next, the case is routed to the appropriate support rep from the cases list. The support rep can then reply by email to the customer with an answer or request for more information. The case can also be escalated to someone else if the support rep cannot answer the case.

When the customer receives a support rep's email messages, they can provide more information or follow up with more questions using the following methods:

- Reply directly to the message
- Click a link in the message

Through either method, the information is added to the original case record. You can also choose to email the information directly to the support rep. The support rep can then escalate the case or reply back to the customer and close the case.

This chapter walks you through the process of a case from the time it is created to the time it is closed. It also describes how to use the cases list. Normally, this may be a complex process with the amount of documentation and communication involved. However, with NetSuite, the complicated aspects are automated, and support reps can focus on helping customers.

This chapter is written for support reps with the Support Person role. However, administrators, support administrators and support managers can also complete the tasks described in this chapter.

Filtering the Cases List

When a support rep enters a case for a customer, the new case is added to the cases list. This is true if the customer calls in or submits a case with an online case form. The cases list displays all open cases by default, but can be filtered to show only the cases you want to work with.

To filter your cases list:

1. Go to Cases > Customer Service > Cases.
2. In the **Assigned To** field, select a support rep or group to view the cases assigned to the rep or group.

   For more information on support groups, see Setting Up Support Groups
3. In the **Response Status** field:
   - Select **Awaiting Support Reply** to view all cases that have a customer message that needs an answer.
   - Select **Awaiting Customer Reply** to view all cases that a support rep has already replied to.
4. In the **Status** field:
   - Select **Open** to view all cases that have not been closed.
   - Select **Not Started** to view all cases that have not been responded to or grabbed.
   - Select **Re-Opened** for all cases that have been closed and then re-opened by another message.
   - Select **In Progress** for cases that have been grabbed and started on.
   - Select **Escalated** for all cases that have been escalated to someone else.
   - Select **Closed** to view all cases that are no longer issues.
5. In the **View** field:

- Select **All** to view all general information for each case record in the order the fields appear on the record.
- Select **Status** to show the status of each case next to the subject.
- Select **Contact** to view the company name and contact information next to each case subject.
- Select **Case Detail** to view the incident date and time, case type, case origin, and case issue for each case.

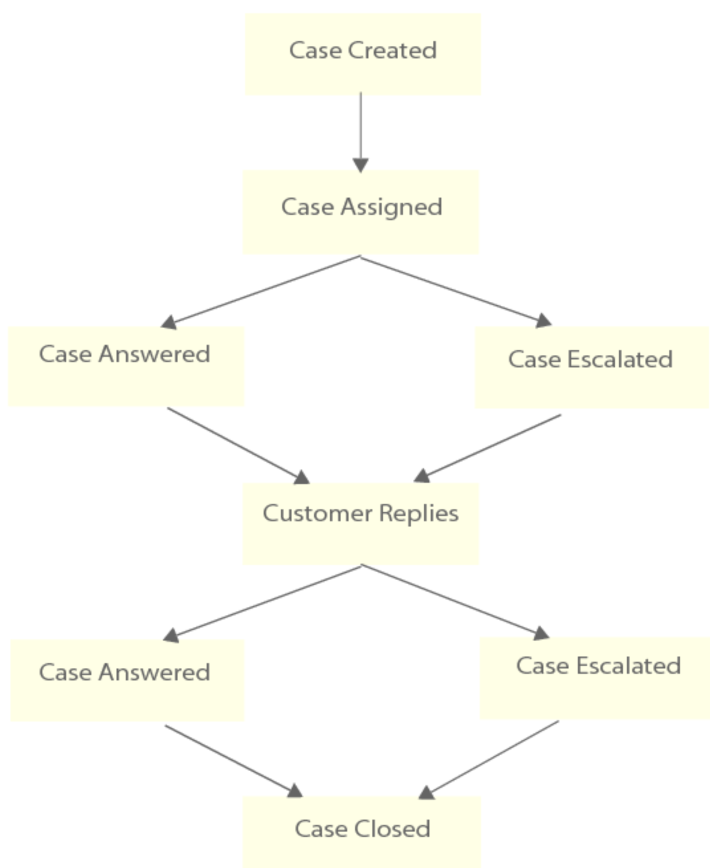
When you return to the cases list after navigating away, the filters default to their last setting.

You can customize the format of the Cases list by clicking **Customize View** in the footer of the list. When you customize a view of a list, you set search criteria for the records you want to see in that list. On the **Results** subtab, select how you want the records to be displayed in your list.

When you click **Save** to save your view, you can view your Cases list as a saved search. To use your custom view, select the name of the search in the **View** field in the footer of the list.

Case Flowchart

Cases typically follow a smooth, assembly-line workflow until they are closed. NetSuite automates the communication and organization of cases. Therefore, you need only step-in to respond to the customer's issue, and then send the case back into the process.



When a case is created from an online case form, email or external case record, it can be assigned in the following ways:

- The case is automatically assigned by a case territory.
- A support manager assigns the case.
- A support rep grabs the case from the cases list.

After the case is assigned:

- The support rep can escalate the case to someone else for more information on the issue.
- The support rep can respond to the customer by typing in a message and emailing the response and closing the case.

If the customer responds, the case is re-opened and assigned to the original support rep. The case can be escalated, or the support rep can respond if necessary, and then close the case again.

Customers can continue to respond with further questions and continue to work with the same support rep. Each time the customer responds, the case is re-opened, and the support rep has all of the previous communication on the case record.

If a support rep creates a case when a customer calls in, they document the question or concern. If they can address the customer's issue, they can immediately close the case.

Create Cases

Cases track issues your customers report and the responses your support representatives give. Cases are created when your customers report problems, ask questions or otherwise need to communicate with you. You can submit support cases and receive responses in English, Chinese (Simplified), French, German, Japanese, Latin American Spanish, and Portuguese (Brazil).

Cases are created in four ways:

- A support rep creates a case record in NetSuite for customer who calls in.
- A customer completes an online case form. See Online Case Forms.
- A customer sends an email to your support address
- A customer clicks the Contact Support link in the Customer Center or your Web site and fills out an external case record.

> For example, Lina from Lina's Dance Studio calls in to Wolfe Electronics' customer service department with a question about installing her new Creativo computer. The support rep who takes the call immediately creates a case record to take notes on the customer's question and retrieves her contact information.

Entering a Case

A support rep should use the following steps to create a case record when a customer who calls in.

To enter a case:

1. Go to Cases > Customer Service > Cases > New.
2. Under **Primary Information**:
    1. Select the form you want to use to enter this case in the **Custom Form** field.

       You create custom case forms at Customization > Forms > Entry Forms.
    2. Enter the subject of this case.
    3. Select the company this case pertains to.

       Companies and individuals you have customer or partner records for appear in this list.

4. Select the profile you want to assign to this case. This profile determines the from name and from email address shown on email notification sent for this case and the notification templates used.

   For more information, see Creating Case Profiles.

5. Select the person or group this case is assigned to.

   To automatically notify the assignee by email when a case is assigned to them, go to Setup > Support > Preferences > Support Preferences. On the **Notification** subtab, check the **Notify Assignees** box.

6. Select the contact who is reporting this support issue.

7. Enter the email address(es) of the customer or contact.

   You can enter multiple email addresses separated by commas or semicolons.

   When you check the **Email Reply** box under your message, the message is sent to all addresses in this field.

8. In the **Phone** field, enter the customer or contact's phone number.

9. Select the status of the case.

   The status of a case can help you track the case workflow process and report progress. You can also place a case on hold using case statuses. For more information, see Creating Case Statuses.

10. Select the priority of the case.

    Case priorities can help determine how important it is to answer a case quickly. For more information on setting up priorities, see Creating Case Priorities.

11. In the **Quick Note** field, add a short note about the case.

    This note can only be seen internally by those in your support team with access to the case. You can also add this field to the cases list to allow you to make notes when viewing the list.

> **Note:** If the Phone number or the Email address field on the Contact record is blank, NetSuite updates it using the one from the Case record.

3. Under **Incident Information**:

   1. In the **Incident Date** field, enter or pick the date of the issue or problem or when the issue was reported.
   2. In the **Incident Time** field, enter the time the issue or problem occurred or was reported.
   3. If you offer support for items, select which item this case refers to.

      To offer support for an item, go to the item's record, and check the **Offer Support** box.

   4. If you use serial numbers, you can select the serial number for the item in the **Serial/Lot Number** field.
   5. If you use the Issue Management feature, select a product this case pertains to.
   6. If this case pertains to a product, select the appropriate module for that product.
   7. Select what type of issue this is.

      Administrators and Support Administrators can create new case types at Setup > Support > Setup Tasks > Case Types > New.

   8. If you offer support for issues, select which issue this case is for.

      Administrators and Support Administrators can create support issues at Setup > Support > Setup Tasks > Case Issues > New.

   9. In the **Origin** field, select how this case was reported.

10. If you use the Help Desk feature, check the **Help Desk** box if this is an internal case entered by an employee.

> **Note:** You can create case rules and assignments to automatically assign help desk cases to your IT staff. For more information, see Assignment Rules & Territories.

4. Click the **Communication** subtab.

   a. In the **Message** field, enter the message that the customer sent you.

      This is message is saved on case records.

      If a customer submits a case with an online case form, the message is automatically logged with the customer as the author. If you create the case record and enter a message in this field, you will be logged as the author of the customer message.

      > **Note:** For saved cases, you can copy and blind copy others on messages and send attachments using the **Email** button on the **Messages** subtab.

   b. If you would like to add a solution to the reply, do one of the following:

      - Enter part of the title of the solution in the **Insert Solution** field, and click **Tab**.
      - Click **List** to choose a solution from the list.
      - Click **Search** to search for a solution to attach.

      Solutions are attached at the end of the reply. If you are emailing a reply to the customer, the text of the solution is included at the end of your reply.

   c. If you want to create a new solution from your reply, click **New Solution**.

      A solution popup opens. Enter information for the solution, and click **Save**.

   d. In the **Reply** field, enter the response given to the customer. You can use the Rich Text Editor to format your reply. You can also click the HTML Source Code link to enter HTML in this field.

      This reply is recorded on both the customer and case records.

   e. If you want to email the response to the customer when this case is saved, make sure the **Send to Customer** box is checked. The reply is also sent to employees selected in the **Copy Employees** field.

      You can set a default for this check box at Setup > Support > Preferences > Support Preferences.

   f. Check the **Internal Only** box if the reply should be sent **only** to the employees selected in the **Copy Employees** field.

   g. Click the following links to view information for other subtabs:

      - Attaching Events, Tasks, and Calls to Records and Transactions
      - Attaching Knowledge Base Solutions to Cases
      - Tracking Time on Cases
      - Escalating Cases

   h. Click **Save** or one of the options:

Save & New	Saves the case and opens a new blank case form.
Save & Same	Saves the case and opens a new form. The company field is prefilled with the same company used in the previous case.

Save & Edit	Saves the case and reopens the record for editing.

This case is now saved as an open case in the cases list with a response status of Awaiting Support Reply. When you answer the case, whether you close the case or not, the response status is set to Awaiting Customer Reply.

You can view cases awaiting support reply, cases awaiting customer reply, or all cases. Set the **Response Status** filter at the bottom of the cases list.

Customer issues, questions, or other feedback entered through an online case form or email to your support address automatically create a case record. NetSuite creates the case record with the information the customer submits, and sets the status to **Awaiting Support Reply**.

Editing a Case

A support rep should use the following steps to edit a customer support case.

To edit a case:

1. Go to Cases > Customer Service > Cases.
2. Click **Edit** next to the case you want to edit.
3. Make changes where needed.

   By default, the case remains assigned to the original support rep unless you select another support rep in the **Assigned To** field.
4. To email changes to your customer, write a message concerning those changes in the **Reply** box, and check the **Email reply** box.
5. Click from one of the following save options:

Save	Saves the edit and returns to case list.
Save & Same	Saves the current case and creates a new, duplicate, case record.
Save & Edit	Saves the edits, and allows you to continue editing the case.
Save & Next	Saves the case and opens the next case in the case list for editing.
Save & New	Saves the case and creates a new case.

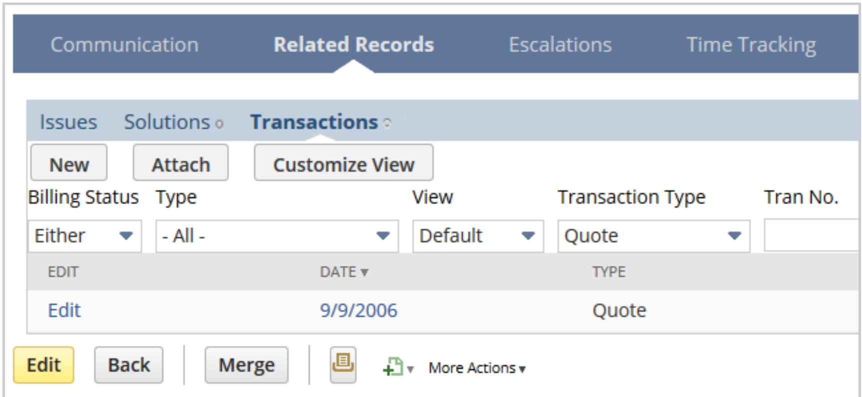
To see a list of cases, go to Cases > Customer Service > Cases. You can view all cases, unassigned cases, or cases assigned to you by changing the filter at the bottom of the page. From the Cases list, you can click the name of the case to view the details of the case record. You can also click **Edit** to add a message from a customer or a response from a support rep.

Linking a Support Case to a Transaction

You can link support cases to seven transaction types including sales orders, invoices, and purchase orders. For example, your company can create an invoice for a repair service performed for a customer. Then, associate it with the support case that initiated the service request.

To link a support case to a transaction:

1. Open the support case record.
2. Click the **Related Records** subtab.



3. Click **New** on the **Transactions** subtab to create a new linked transaction. You can also click **Attach** to link an existing transaction to the support case.

Assigning Cases

When a case record is entered, it needs to be assigned to either a person or a group. Cases can be assigned manually or by case territories that support administrators or support managers set up. Support administrators, support managers and support reps can all assign cases.

When Wolfe Electronics support rep Inger Wyman receives a customer call with a question and creates a case record, she can do the following:

- assign it to herself in the Assigned To field if she knows she will be able to answer the question
- assign the case to a support group who specializes in the area
- assign the case to a support rep who specializes in the area
- escalate the case to someone else if she cannot answer the question
- leave the case unassigned

If the case is assigned to a support group or left Unassigned, another support rep can grab the case. When a support rep grabs a case, it is automatically assigned to him or her. To grab a case, click Grab next to the case on the cases list. See Grabbing Cases.

If no Grab link appears, the case is already assigned to a support rep.

To assign a case to someone other than yourself:

1. Go to Cases > Customer Service > Cases.
2. Click **Edit** next to the case you want to assign.
3. Under Primary Information, in the **Assigned To** field, select the person or group you want to assign the case to.
4. Click **Save**.

This case is now assigned to the appropriate person or group and shows in that group or person's cases list.

Grabbing Cases

Grabbing is a quick way to assign a case to yourself. When you assign a case to yourself, you can respond to the customer. You have to be a support representative in order for the grab link to be available.

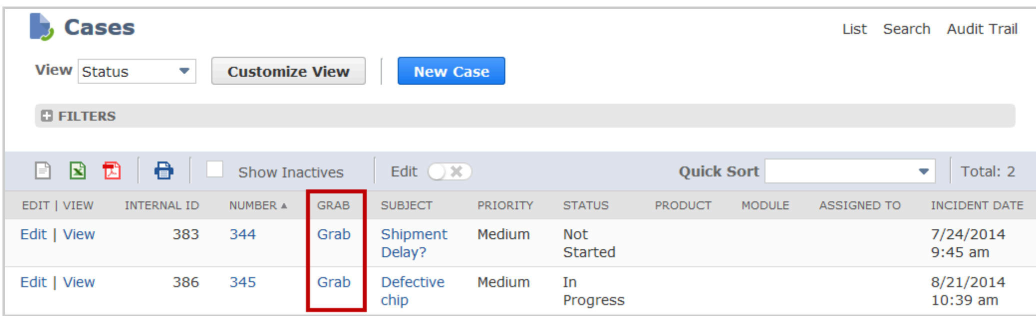
To grab a case:

1. Go to Lists> Support > Cases > Customer Service > Cases..
2. Click **Grab** next to the case you want to assign to yourself.

   The case is automatically assigned to you.

   You cannot grab a case that is already assigned to someone else.
3. Make changes where needed, such as priority or entering a reply to the customer.

   If you reply to the customer and mark the case closed, the case no longer appears on the active case list. However, you can set the status filter to show closed cases.
4. Click **Save**.



To avoid having to grab cases, an administrator can set up case rules and territories. Rules and territories automatically route cases to support reps based on certain criteria. For more information, see the help topics Creating Case Rules and Creating Case Territories.

If the administrator lets support reps receive email when a customer responds to a case, they can receive additional questions or information. These messages are also added to the case record. For more information, see Customer Responses to Cases.

Administrators can let support reps receive customer responses by clearing the **Receive Customer Replies in Case List Only** box. Go to Setup > Support > Preferences > Support Preferences.

From the Cases list, you can click the name of the case to view the details of the case record. You can also click **Edit** to add a message from a customer, or a response from a support rep.

Escalating Cases

You escalate a case if the assigned support rep cannot resolve it. You can escalate the case to any employee or employee group in your account and to vendors and partners.

When you escalate a case, use the escalation message to send information to the group or person to whom the case is being escalated. The escalation message is private, and is logged under the **Communication** subtab of the case record. The customer does not receive the message.

> For example, a Wolfe Electronics support rep has been assigned a case about an invoice submitted by a customer online. The rep is not an expert on this case issue. Therefore, the rep escalates the case to rep in the sales department, with a message on how they can help with the case.

> **Note:** Email sent to a group is sent to the email address listed on the group record. It is not sent to the individual email addresses of each group member. To ensure that each group member is notified, create a group using your email client. Then, supply that group's email address on the group record.

To escalate a case:

1. Go to Lists > Support > Cases.
2. Click **Edit** next to the case you want to escalate.
3. On the **Escalations** subtab, enter a private message for the person or group you are escalating the case to.

   This message is sent to the person in an email. It is recorded under **Messages** on the **Communication** subtab.
4. On the **Escalate To** subtab, select the person or group you are escalating the case to in the **Employee** field, and click **Add/Edit**.

   If you want to escalate only to support reps, go to Setup > Support > Preferences > Support Preferences. On the **General** subtab, check the **Escalate to Support Reps Only** box. Disabling this preference lets you escalate cases to any employee as well as vendors and partners.
5. When you have finished, click **Save**.

This case has the status Escalated. An email message is sent to the person to whom you escalated the case.

Escalating a case does not raise its priority or change who the case is assigned to. It sends the email message to advise the person that you need assistance on the case. It also changes the status of the case to **Escalated**. The email includes the case number, your escalation message, and the customer's message.

The person you escalate the case to has the choice to do one of the following:

- Reply to your email message with information you can use to reply to the customer
- Go to the case record and answer the case directly

You can de-escalate a case from an employee by returning to the case record. On the **Escalate To** subtab, click the person's name, and then click **De-Escalate**. If you escalate the case multiple times, this subtab lists all of the uses who have had the case.

To view a log of who this case has previously been escalated to, click the **History** subtab.

Case escalation dates and times respect the time zone they are entered in, not your company's time zone.

You can set up cases so that they are automatically escalated based on certain conditions you set. For information, see the help topic Setting Case Escalation Rules and Assignments.

Locking Closed Cases

Locked cases are closed cases that can be viewed but cannot be reopened, edited, or updated by anyone other than administrators.

Cases that are locked do not have **Edit** or **Grab** links in the Cases list. They cannot be updated from the Customer Center or using the Email Case Capture feature.

Administrators, Support Administrators, and Support Managers can set the preference to lock closed cases after a certain number of days have passed.

To lock closed cases:

1. Go to Setup > Support > Preferences > Support Preferences.
2. On the **General** subtab, in the Case Lockout section, check the **Lock Closed Cases After Lockout Period** box.
3. In the **Period (Days)** field, enter the number of days that a closed case should remain available for editing, updating, and reopening.

   To immediately lock closed cases, enter **0**.
4. Click **Save**.

Tracking Time on Cases

Time Tracking for CRM enables you to keep track of time spent on cases with the option to bill that time to customers.

For example, a support rep receives a call from a customer. The rep can enter a case and begin timing the duration spent with the customer on the phone on the **Time** subtab. If the rep checks the box in the **Billable** column, an invoice can be created later for the time spent resolving the case.

To use Time Tracking for CRM, an Administrator can go to Setup > Company > Enable Features. On the **Employees** subtab, check the Time Tracking for CRM box.

> **Important:** Time Tracking for CRM requires time tracking in NetSuite. See the help topic Managing Time Tracking.

> **Note:** If you use the Projects feature and you want to track customer time, disable the **Show Projects Only for Time and Expense Entry** preference. Go to Setup > Accounting > Accounting Preferences and then click the **Time & Expenses** subtab. When this preference is enabled, time can be tracked only for cases associated with a project record.

To track time for cases:

1. Go to Cases > Customer Service > Cases.
2. Click **View** next to the case you want to track time for.
3. On the case record, click the **Time Tracking** subtab.

   > **Note:** Cases, tasks, or event records with more than 9500 time entries on the **Time Tracking** subtab, display a static list of time entries. You cannot edit entries directly from the list.
4. Click **New Time**.
5. Your name appears in the **Employee** field. Depending on your role access, you can select another employee if you are entering time for someone else.
6. Enter information for this time transaction.

For more information about entering time for Time Tracking, see the help topic Entering a Time Transaction.

For more information about entering time for Timesheets, see the help topic Timesheets.

7. Repeat the steps above to track time for additional employees or items for this case.
8. When you have finished, click **Save**.

If you track time for cases and want to bill your customers, see the help topic Billing Time to Customers.

All employee names appear on the **Time** subtab by default.

Those with the Administrator role can control which names show for certain roles in this list. Go to Setup > Users/Roles > User Management > Manage Roles.

Responding to Customer Cases

When a case is created and assigned, you want to respond to the customer as quickly as possible.

If you take the support case on the phone, you can take notes in the **Reply** field. These notes document the advice you gave the customer. Then, set the status to **Closed**, and then save the case. To email the customer information from the case, enter it in the **Reply** field of the case record. Then, check the **Send to Customer** box.

> **Note:** Communication sent from the **Reply** field will use the email address specified in the **Profile**. This email address is intended to be used across all standard case communication to increase consistency of communication. To send an email using the email address of the person replying to the case, click **Email** in the **Messages** subtab. Then, select the required address from the **Message** subtab.

Cases created by customers through an online case form or external case record can be answered by entering a message in the **Reply** field. Check the **Send to Customer** box to email your response when the case is saved.

> For example, Lina of Lina's Dance Studio clicks Contact Support on Wolfe Electronics' Web site to submit a case about her new Creativo computer. As soon as she submits the case, a case record is created in Wolfe Electronics with her message. When Tom Taylor, a support rep, grabs the case, he reads her question, investigates and replies to her by email using the case record. When he clicks Save, his message is emailed to Lina, and the case is closed.

To reply to a customer support case:

1. Go to Cases > Customer Service > Cases.
2. To reply to a case, click **Grab** next to the name of the case you want to reply to.

   The case is automatically assigned to you, and you can make changes to the case record.

   You cannot grab a case that has already been assigned to someone else.
3. In the **Email** field, you can enter any additional email addresses separated by commas or semicolons.

   If you email the response, it is sent to the addresses entered in this field.
4. In the **Status** field, select the status of this case.

If you are currently working on the case, select **In Progress**.

If you are replying to the customer with a solution, select **Closed**.

5. If the priority of the case has changed, select a new priority.
6. To copy other employees on the details of this case, select employee names in the **Copy Employees** field.

   Email is sent when you save the case record.
7. On the **Communication** subtab, if the Customer has given you a new message, enter the message in the **Message** field.

   Your name still appears as the author of this message.

   The last message from a customer gave appears in the **Message** field. If you change the company or customer on this case, the last message remains from the previous company or customer.
8. In the **Reply** field, enter a solution for the case.

   This solution is logged on the case record and the customer record.

   > **Note:** To copy other recipients or add attachments to your message, email your message by clicking the Email button on the Messages subtab.
9. To email your reply to the contact addresses listed in the **Email** field, check the **Send to Customer** box.
10. If you do not want this reply to be seen by the customer, check the **Internal Only** box.

    If you check this box, the message is sent only to employees selected in the **Copy Employees** field. The customer is not emailed copies of your message, and only employees can see the comments you add in the Reply field.

    You can also mark previous case messages as Internal Only when viewing a case record. On the **Messages** subtab under the **Communication** subtab, click the link in the **Internal Only** column to toggle this setting for case messages.
11. To associate tasks, calls or events with this case, click the **Activities** subtab.

    For more information, see the help topic Attaching Events, Tasks, and Calls to Records and Transactions.
12. If you use the Knowledge Base feature and want to attach a solution to this case, perform the following. Select it in the **Insert Solution** field, or click **Search** to find the solution you want to attach. You can click **New Solution** to create a new solution to add.

    The text of the attached solution fills in below the text in the **Reply** field and is emailed with the reply.

    For more information, see Attaching Knowledge Base Solutions to Cases.
13. If you use Time Tracking for CRM, see the help topic Tracking Time on Cases for steps on filling out the information on the **Time Tracking** subtab.
14. On the **General** subtab, click the **Files** subtab to attach any files associated with this case from the File Cabinet.
15. If you use the Issue Management feature, click the **Issues** subtab to create or attach an issue for this case. For more information, see Linking Issues with Cases.
16. To escalate a case to another employee, partner or vendor, click the **Escalate** subtab. For more information, see Escalating Cases.
17. Click **Save**.

Your response is added to the **Messages** subtab on the case record. If you checked the **Send to Customer** box, details of the case are emailed to the customer. In this email, the most recent message appears at the top of the message. Any prior information appears at the end of the message in **Message History**.

> **Note:** When employees creating or updating case records appear in the **Company** field, the notification email does not display new information from the **Reply** field. This information is tracked on the **Messages** subtab of the case record.

Most changes you make to fields are automatically logged on the **Notes** subtab. The subtab does not log changes to the **Case Number**, **Date**, **Time**, **Phone**, and **Escalation Message** fields.

By tracking this information, your employees know what kinds of questions, concerns, and problems your customers are dealing with.

For information about customizing templates for NetSuite generated email, see the help topic Customizing Templates for System-Automated Email.

Forwarding and Replying to Existing Case Messages

Existing messages appear listed in the Messages section of the **Communication** subtab on the case record.

You can forward a message from a case record to another recipient. The text and heading of the original message is added below your message. When you forward the message it is not saved in NetSuite and it is not recorded in the case record. Forwarded messages do not have a reply to address.

To reply to existing case messages:

1. Click **View** for a message to open it in a new form.

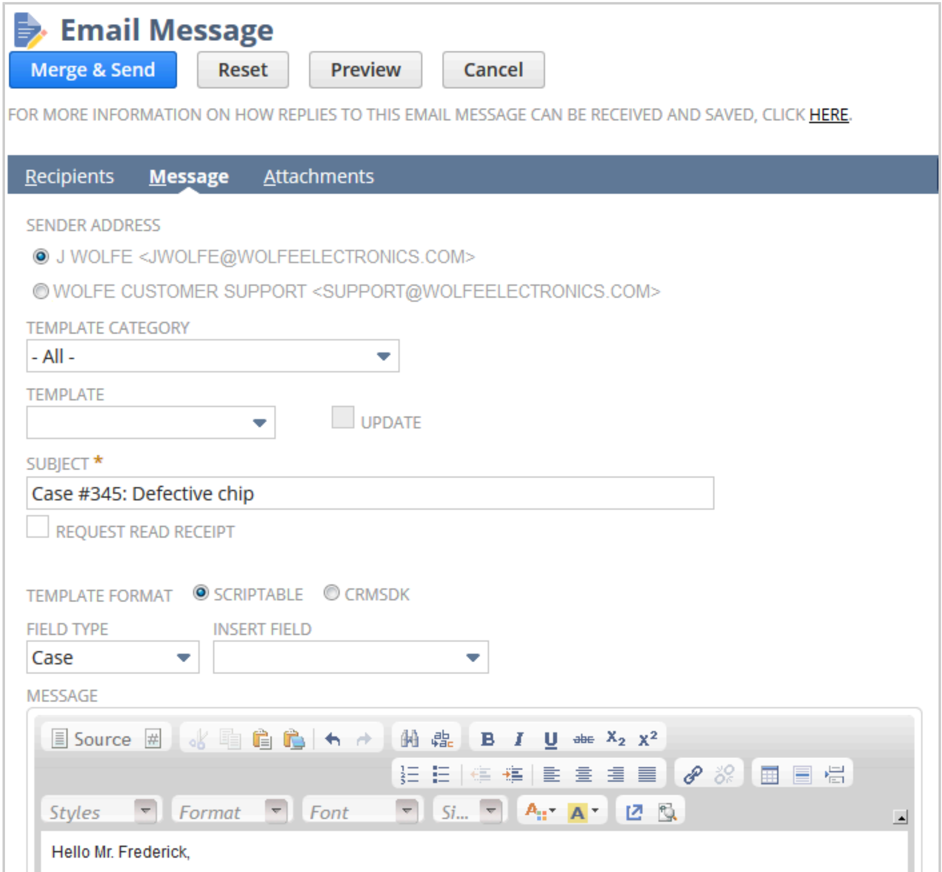
   In this message you can manage recipients, and read receipts and attachments.
2. Click the **Recipients** subtab to add recipients to email.

   You can also add blind carbon copy recipients to email sent from a support case record.
   a. Enter an email in the **Email** column.
   b. Check the box in the **BCC** column.
   c. Click **Add**.

      Reply email from **BCC** recipients are marked **Internal Only**.
3. Click the **Message** subtab to can read the existing message.

   At the top of the form, you can reply, reply to all, and forward a message.

   You can reply to a message on a case record. Your reply is recorded in the message history on the case record.
4. Click the **Attachments** subtab to add attachments to the email.
5. When you are ready to send your email, click **Merge & Send**.

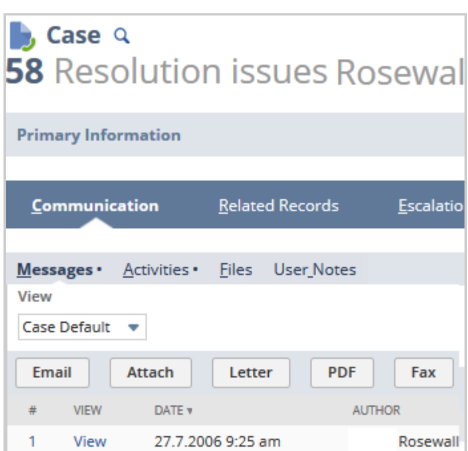


Selecting the From Address for Email Sent From Support Cases

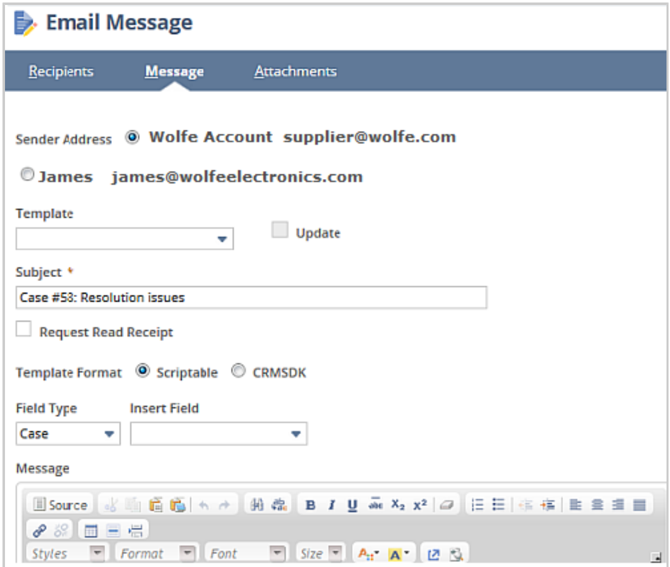
You can send email from a support case to someone besides the customer the case was entered for.

To send email to an address other than the customer’s:

1. Click the **Communications** subtab on the case record.
2. On the **Messages** subtab, click **Email**.



The Email Message popup window appears.



3. Click the **Message** subtab.
4. For **Sender Address**, choose either the email address on the case profile for which you are attending this support case, or your login email address.
5. Send the message.

Viewing HTML Attachments of Email Case Messages

HTML attachments of inbound emails render as plain text files to ensure that they are secure and will not harm your NetSuite account data. To view a readable format of the attachment, you must first download the file.

To view the HTML file attachment:

1. Click the **Communications** subtab on the case record.
2. Click the **Messages** subtab.
3. Click **View** next to the email message, and then click the **Attachments** subtab.
4. Click **Download** next to the HTML file that is rendered as plain text, and then save it to your computer.
5. On your computer, click the file. It opens as an HTML document.

Customer Responses to Cases

Customers first submit cases online or by calling your customer support team. When support reps answer customers by sending email messages, customers may reply with more information or further questions.

Customers can use the following methods for replying to your customer support team:

- Calling your customer support team with the case number.

The support rep can then open the case record and add the customer's comments.

- If you use the Capture Email Replies feature, customers can reply to the automatic email, or the support rep's response email.

  This reply is added to the case record.

- Logging in to the Customer Center, and then using the Cases list to add a message to the case record.

You can manage how customer support reps are notified of cases and changes to an individual case. Go to Setup > Support > Preferences > Support Preferences page. For more information, see Setting Customer Service Preferences.

When customers respond to your case messages using the Capture Email Replies feature, they can include attachments. You can open those attachments from the **Messages** subtab on the case record.

If you set the **Messages Reopen Closed Cases** preference, customers can edit the case or reply to a case email message. The original case status changes from **Closed** to **Re-Opened** and has a response status of **Awaiting Support Reply**.

Customers can confirm that you answered their questions, and then click save and close the case. This documents that the customer is satisfied and closes the case if it was not already closed by the support rep.

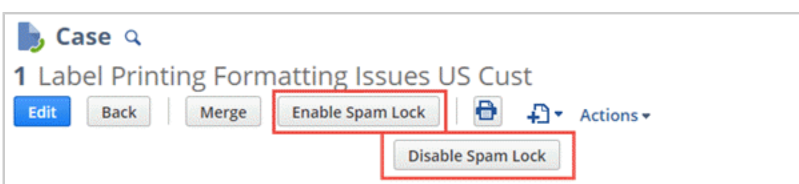
> **Note:** When the customer saves this form, they are transferred to the website entered at Setup > Company Information.

If the customer replies with further questions or clarification, the status changes **Re-Opened**. You can do the following:

- Answer the customer again.
- Escalate the case if you are unsure how to answer the customer's additional questions.

Apply Spam Lock to Incoming Email Messages

On the case record, you can apply spam lock to incoming email messages using the case's reply to address.



When you apply spam lock to a case, incoming messages to the support case are accepted under specific conditions. Messages must be sent using an email address from one of the following valid types in NetSuite:

- All Employee email addresses
- Contact email address of person who submitted case
- Email address of the company where the case relates to
- Email address of the case profile assigned to the case

- Specific email addresses added to the case record

Replies sent from an unrecognized source are discarded. The option applies to individual cases. Any user who can edit case records, can click the **Enable Spam Lock** button on an existing case record to set this option. Spam lock is turned off, by default.

> **Important:** If an email is not sent from one of the valid types, the case is not updated. This also applies to SuiteScripts dependent on case updates. For scriptable record types, see the help topic Support.

Close Cases

When you reply to a customer with a definitive answer, you can change the case status to **Closed**. On the case record, in the Status list, select Close.

Closed cases are saved in your Cases list, but the list filters out closed cases, by default. You can view closed cases, but they are not visible with the open cases.

If a customer replies to the email message sent from the case, the case is re-opened. It is assigned to the last sales rep that replied to the case.

If the customer clicks Contact Support or an online case form link again, a new case is created, and the case workflow begins again.

If you use the Issue Management feature, cases can close automatically when all issues associated with a case are closed. For more information, see Setting Issue Management Preferences.

Merging Cases

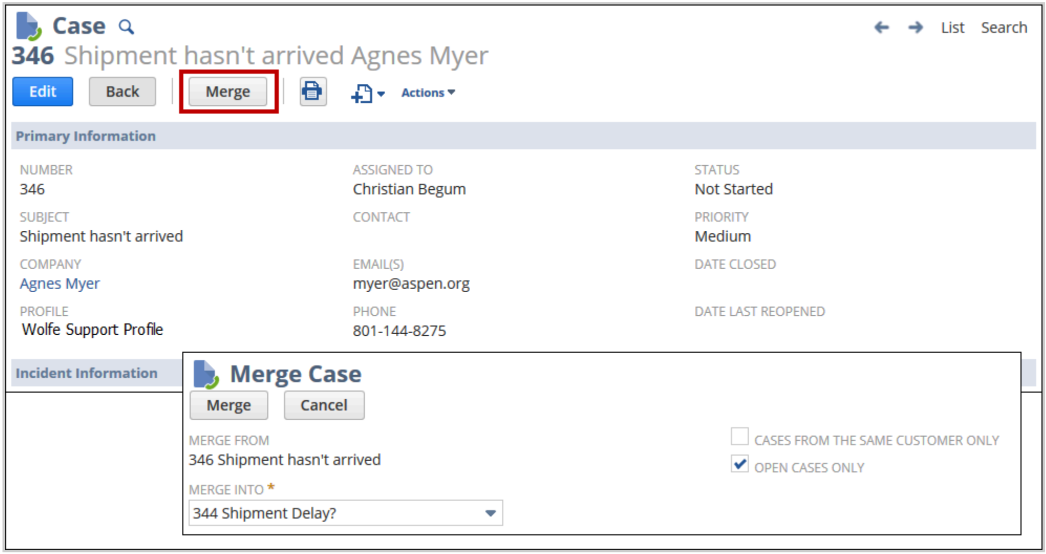
In NetSuite, you can merge two support case records into one and reduce duplicates. The data from the duplicate case record for fields that are not already defined in the master record are transferred to the master case record.

> **Note:** When you merge two case records from two different customers, you are confirming that the records are the same. The merge grants access to the Merge To case to the both customers through an external URL.

To merge support cases, your user role must have both the **Cases** and **Duplicate Case Management** permissions with their levels set to **Full**.

To perform the mass merge update:

1. Go to Lists > Support > Cases.
2. Select a case you want to merge and click either **View** or **Edit.**
3. On the case record, click **Merge**.
4. Define whether you want to consider cases from the same customer only or open cases only.
5. Select the support case that you want to merge your duplicate case with, and then click **Merge** or **Cancel** to stop the merging process.



Note: If the duplicate cases do not contain any data that you want to keep, see Deleting Cases.

Deleting Cases

In NetSuite, you can delete an unlimited number of support case records. If you are using a role other than administrator, you can only delete cases that you are the organizer or owner of.

To perform the mass delete update:

1. Go to Lists > Mass Update > Mass Updates.
2. Click **Customer Support and Service**, and then click **Delete Cases**.
3. On the **Criteria** subtab, define which cases you want to delete.
4. Click **Preview**.
5. In the Results list, clear the box in the Apply column for each case you do not wish to delete.
6. Click **Perform Delete**, or **Return To Criteria** if you want other search results.

Note: If you want to keep data from duplicate cases, consider merging them with the original case record. See Merging Cases.

Issue Management

The Issue Management feature lets you set up NetSuite to document and manage issues that occur with the products you manufacture and sell. Customer support reps and quality assurance employees primarily enter issues. However, you can control which roles have access to issues and what settings those roles have access to.

Before employees can begin tracking issues, someone with an Administrator role must assign roles with issue permissions to employees. When roles are assigned, someone with an Administrator or Issue Administrator role can begin setting up Issue Management. They can create issue types, issue statuses, issue tags, and product records in addition to setting preferences for Issue Management.

This chapter is designed for employees with the Issue Administrator or QA Manager roles. However, all of the following roles may find this chapter useful for understanding how issue management works.

Role	Access
Issue Administrator	This role can set up all aspects of the Issue Management feature other than customizing and assigning user roles.
Engineering Manager	This role can edit or create issue records and has full access to issue reports.
Engineer	This role can edit or create issue records and can customize/edit issue reports.
PM Manager	This role can edit or create issue records and customize/edit issue reports.
Product Manager	This role can edit or create issue records and has full access to issue reports.
QA Manager	This role can set up all aspects of the Issue Management feature, edit or create issue records and customize issue reports.
QA Engineer	This role can edit issue or create records and can customize/edit issue reports.
Support Manager	This role can edit or create issue records.
Support Person	This role can edit or create issue records.

Issue Management Overview

The Issue Management feature expands your customer support capabilities and allows for accurate follow-up with customers that submit problems.

This feature includes the following:

- **Issue records –** Track product defects and enhancement requests using issue records. Link support cases to issue records to enable support reps to follow up with customers and allow customers to view appropriate issue information.
- **New Standard Roles –** Roles for employees who deal primarily with issue resolution. These roles include Engineering Manager, Engineer, QA Manager, QA Engineer, Issue Administrator, Product Manager and PM Manager.
- **New group types –** Create a new employee group. Designate the group as a Product Team or Functional Team or assign an issue role to the group, making it an issue queue.
- **Issue Management preferences –** Set preferences for using the feature.
- **Status Transition table –** Set how issues can change statuses and who can make each change.

- **Products, Module, Versions & Builds –** Track product names separately from item records. Then associate an issue with a product or a specific module of a product. Versions and builds can also be tracked with issues to localize a problem.
- **Statuses** – Set up both internal and customer-facing issue statuses to define the steps of the resolution process. Certain statuses automate other parts of issue management, such as relationship management for issues.
- **Issue Roles –** The new standard roles are each tied to an issue role type. The type defines what employees with that type of role can do with issues along with role-specific default values. You can change the settings for the default role types or add new types that you can apply to custom roles.
- **Automatic Email Notifications** – You can be notified by email when issues reach a certain status. Go to Home > Set Preferences. On the General subtab, set the Default Issue Email Notification field. This email notification can be customized for your company's needs. For more information, see Customizing Issue Notification Email.
- **Issue Tags –** Create search keywords that can be selected on issue records. This allows issues to be searched internally.
- **Other issue lists –** You can also create additional statuses, types, and sources for issues as well as severity and priority levels.

Issue Management Setup Checklist

Use the following checklist to help you set up the Issue Management feature:

#	Task
1	Setting Issue Management Preferences
2	Setting Up Issue Severities
3	Setting Up Issue Priorities
4	Setting Up Issue Types
5	Setting Up Issue Sources
6	Setting Up Issue Reproducibility
7	Working with Products and Modules
8	Creating Issue Role Types
9	Customizing Issue Notification Email
10	Creating Employee Groups for Issues
11	Setting Up Issue Tags
12	Setting Up Issue Statuses
13	Creating an Issue External Status
14	Managing Issue Status Transitions

Getting Started With Issue Management

When you use the Support Management feature, you can improve your customer support offerings by enabling and setting up the Issue Management feature.

Setting up this feature requires the Issue Administrator role to customize the selections that can be made on issue records. They must also set up the workflow process of issue resolution for your company.

Some steps require the account Administrator role, such as enabling the feature and giving employees access to issues.

To get started with Issue Management:

1. Enable the feature at Setup > Company > Setup Tasks > Enable Features.
2. > **Note:** This can only be done with the Administrator role.
3. Set issue management preferences at Issues > Setup > Issue Preferences. For more information, see Setting Issue Management Preferences.
4. Customize and add to the following lists:
   - Setting Up Issue Severities
   - Setting Up Issue Priorities
   - Setting Up Issue Types
   - Setting Up Issue Sources
   - Setting Up Issue Reproducibility

   If you are not yet sure how to customize these lists, you can edit them after using the feature with the default lists.
5. Set up product records with modules, versions, and builds at Issues > Setup > Products. For more information, see Working with Products and Modules.
6. Create or edit the issue role types that define how employees with different responsibilities handle issues and the default settings for issue records. For more information, see Creating Issue Role Types.
7. Give employees access to issue records in one of two ways:
   - Assign the issue role types to roles already used by the employees at Setup > Users/Roles > User Management > Manage Roles.
   - Assign the issue user roles to employees on employee records at Lists > Employees > Employees.

   > **Note:** This requires the Administrator role.
8. Create employee groups from lists at Issues > Relationships > Groups > New. Set up groups of people for the following purposes:
   - **Product Team groups** - Can be selected in the Product Team field on issues. Product teams designate who is responsible for resolving an issue. Members of this team are emailed when an issue is first entered so that everyone is aware of the problem.
   - **Functional Team groups** – Can be emailed copies of the issue from the Communication subtab on issue records. You may want to check this box for all product team groups. Then, create additional function team groups for other teams you want to email.
   - **Issue Role** – When you select a role that corresponds to the role of this group's members, this group can be assigned to issues.

   For more information, see Creating Employee Groups for Issues.
9. Customize the email notification your employees and customers receive when issues are created or updated. For more information, see Customizing Issue Notification Email.
10. Create issue tags to set constant keywords for issues at Setup > Support > Issues > Issue Tags. For more information, see Setting Up Issue Tags.

11. Create and edit issue statuses at Setup > Issues > Setup Tasks > Issue Statuses. For more information, see Setting Up Issue Statuses.
12. Create and edit external issue statuses at Setup > Issues > Setup Tasks > Issue External Statuses. Customers can see these statuses in the Customer Center when you allow access. For more information, see Creating an Issue External Status.
13. To set how issues move through the resolution process. Creating an Issue External Status
14. Go to Issues > Setup > Manage Status Transitions. For more information, see Managing Issue Status Transitions.
15. For example, you may not want to allow an issue that has been set to In Progress to be changed back to Submitted. In the In Progress row, you would check the boxes in every column except the Submitted column.

    If you edit or create issue statuses after setting this page, you must return to this page to reset the status workflow.
16. Set your individual preferences for issue email notification at Home > Set Preferences. On the **General** subtab, set the **Default Issue Email Notification** and **Notify Me Upon Issue Assignment** fields.

Setting Issue Management Preferences

You can set general preferences for using the Issue Management feature on the Issue Preferences page. You can allow multiple versions and builds to be selected on issues. You can automatically close cases that are linked to an issue when the issue is closed.

To set preferences for the Issue Management feature:

1. Go to Issues > Setup > Preferences > Issue Preferences.
2. Check **Use Last Assignee** to automatically assign an issue to the last employee assigned the issue for the role type associated with the status.

   For example, an Engineer sets the status to Fixed, sending the issue to QA for completion. The QA Engineer finds that the issue still needs work and sets the status back to In Progress. When the status is set to In Progress, it is automatically assigned to the Engineer who was last assigned to the issue.
3. Check **Use Multiple Versions and Builds** to add a **Versions** subtab to issue records. This lets you set an issue as broken in, targeted for or fixed in more than one version and build.

   For example, a company that produces software finds that the same issue is present in both their Version 5 and Version 6 products.
4. Check **Automatically Close Linked Cases** to set a case's status to **Closed** when all attached issues are set to a base status of **Closed**.

   > **Note:** A case must be in a status that allows automatic closure to close with closed issues. To mark a case status as one that can automatically close, edit the case status. Go to Setup > Support > Setup Tasks > Case Statuses > New. Check **Auto Close With Issues**.

   You can have email notification sent to customers when cases are closed automatically when associated issues are closed. Go to Setup > Support > Preferences > Support Preferences. Under Notification, check **Notify Customer Upon Automatic Closure**.
5. In the **Send Customer Notification When** field, select default criteria for when customers that have cases associated with an issue should be notified by email.

For example, issue 503 is attached to a case submitted by customer Mary Smith. Selecting **Status Changes** sends email to the email address on the case record every time issue 503 changes status.

Customers can change the notification criteria or choose not to be notified using preferences in the Customer Center.

6. Check **Allow Customer Override** if you want customers to be able to change their issue notification email settings in the Customer Center.
7. In the **Customer Template** field, select the template you want to use to notify customers of changes to an issue.
8. In the **Employee Template** field, select the template you want to use to notify employees of changes to an issue.

   You can customize these templates at Setup > Issues > Issue Preferences. For information, see Customizing Issue Notification Email.
9. Click **Save**.

Setting Up Issue Statuses

Issue statuses define where an issue is in the resolution process. Each status must be associated with a base status of Open, Closed, On Hold or Resolved. Base statuses are used for reporting and search purposes and cannot be edited.

Each status must also be associated with an issue role type. Employees using roles with this issue role type can be assigned to issues of the associated status.

When you create a new issue, the statuses you create are available from the Issue Status list on the issue record.

To set up issue statuses:

1. Go to Issues > Setup > Issue Statuses.
2. Click below the last row of data to select a clean line.
3. In the **Name** column, enter a name for the issue status.

   You select this name in the **Status** field on issue records.
4. In the **Base Status** column, select one of the following as a base status for this status:
5. In the **External Status** column, select the external status that is displayed for issues with this status when customers view issues in the Customer Center.

   For more information on external statuses, see Creating an Issue External Status.
6. In the **Assigned To** column, select the issue role type that can be assigned issues with this status.

   For more information on issue role types, see Creating Issue Role Types.
7. Check the **Duplicate** box if an issue with this status is concerning the same problem addressed in another issue. When you provide the issue number for the original issue, cases linked to the duplicate are copied over to the original.
8. Check the **Fixed** box if issues with this status have been fixed or resolved.
9. Check the **Trackable** box to allow email notifications to be sent when an issue is set to this status.

   This allows the status to be selected in the Email Me When field on the **Communications** subtab of issue records.
10. Check the **Broken In Mandatory** box if issues with this status must have a broken in version and build selected to be submitted.

11. Check the **Target Mandatory** box if issues with this status must have a target version and build selected to be submitted.
12. Check the **Fixed In Mandatory** box if issues with this status must have a fixed in version and build selected to be submitted.
13. Enter a description of this status.
14. Click **Add**.
15. Click **Save**.

You can rearrange issue statuses. Use the **Move Up**, **Move Down**, and **Move to Top** buttons to set their order in the **Status** field on issue records.

To edit an issue status, click the name of the status to select the line. Edit the text and selections for that status, and then click **Done**.

To inactivate an issue status, check the **Show Inactives** box, and click the name of the status. Check the box in the **Inactive** column, and then click **Done**.

Creating an Issue External Status

Issue external statuses define the stages in an issue's progression in a manner that you want to display to customers. Customers can view issue records associated with cases they have submitted in the Customer Center.

Each external status is linked to a base external status. Customers can choose to be sent an email notification when the base status of an issue changes.

External statuses must be linked to an internal status to display to customers. When an issue changes status internally, the linked external status shows to customers.

To create a new external status:

1. Go to Issues > Setup > Issue External Statuses.
2. In the bottom line of the list, in the **Name** column, enter a name for your new external status. This name will show to customers in the Customer Center when you select the corresponding internal status on an issue record.

   Associate internal statuses with external statuses at Issues > Setup > Issue Statuses.
3. In the **Base Status** column, select the base status that should be associated with this external status. External statuses can only be associated with internal statuses that share the same base status.
4. In the **Description** column, enter a brief definition of issues that meet this status.
5. Click **Add**.
6. Click **Save**.

You can rearrange issue statuses. Use the **Move Up**, **Move Down**, and **Move to Top** buttons to set their order in the **Status** field on issue records.

To edit an issue status, click the name of the status to select the line. Edit the text and selections for that status, and then click **Done**.

To inactivate an issue status, check the **Show Inactives** box, and click the name of the status. Check the box in the **Inactive** column, and then click **Done**.

Setting Up Issue Severities

Use the Issue Severities list to manage what options appear on the Severity field on issue records. Assigning a severity to an issue lets the assignee know how big the problem is and can help determine its priority. Severity levels are customizable. Typically an organization might use a 1–5 scale, with 1 being the highest priority and 5 the least priority issue.

To set up issue severities:

1. Go to Issues > Setup > Issue Severities.
2. On the **Issue Severities** list, click the last row if it is not already selected. This row should be blank.
3. In the **Name** column, enter a descriptive name for the severity level you want to add.

   This name will be available to select in the **Severity** field on issue records.
4. In the **Description** column, enter a brief description of what types of issues meet this severity level.
5. Click **Add**.
6. Click **Save**.

To edit an existing issue severity, click the name of the severity to make it editable. Change the name or description, and click **Done**. To delete a severity, click the name, and then click **Remove**.

You can rearrange issue severities to change how they appear in the **Severity** field on issue records. Click the name of a severity. Use the **Move Up**, **Move Down**, and **Move to Top** buttons to set their order.

Setting Up Issue Priorities

Use the Issue Priorities list to create new choices for the Priority field on issue records. Assigning a priority to an issue lets the asssignee when the issue should be addressed in comparison to other issues.

To set up issue priorities:

1. Go to Issues > Setup > Issue Priorities.
2. On the **Issue Priorities** list, click the last row if it is not already selected. This row should be blank.
3. In the **Name** column, enter a name for the priority level you want to add. For example, to add to the list of default priorities, you can continue numbering P6, P7, P8, and so on.

   This name will be available to select in the **Priority** field on issue records.
4. In the **Description** column, enter a brief description of what types of issues meet this priority level.
5. Click **Add.**
6. Click **Save**.

To edit an existing issue priority, click the name of the priority to make it editable. Change the name or description, and then click **Done**. To delete a priority, click the name, and then click **Remove**.

For example, to use priorities Low, Middle, and High, you would first remove the default priorities P4 and P5. Then, you would click P1 to change the name to High, and then click **Done**. You would then do the same to replace P2 and P3 with Middle and Low.

You can rearrange issue priorities to change how they appear in the **Priority** field on issue records. Click the name of a priority. Use the **Move Up**, **Move Down**, and **Move to Top** buttons to set their order.

Setting Up Issue Types

Issue types define the type of change that needs to be made for an issue. For example, the default issue type Problem can be assigned to issues that involve restoring functionality to a product. The default issue type Enhancement can be assigned to issues that request new functionality to existing products or request new products.

You can create new issue types to make them available for selection in the Type field on issue records. For example, you may want to create a new issue type Customer Specific for issues that are specific to one customer.

When you define status transitions, you can create a set of transition rules for each issue role by issue type. Go to Issues > Setup > Manage Status Transitions. If you do not use a default issue type, you should remove the type from the list to avoid confusion with status transitions.

To set up issue types:

1. Go to Issues > Setup > Issue Types.
2. On the **Issue Types** list, click the last row if it is not already selected. This row should be blank.
3. In the **Name** column, enter a name for the type you want to add.

   This name will be available to select in the **Type** field on issue records.
4. In the **Description** column, enter a brief description of issues that fit into this type.
5. Click **Add**.
6. Click **Save**.

To edit an existing issue type, click the name of the type to make it editable. Change the name or description, and then click **Done**. To delete a type, click the name, and then click **Remove**.

You can rearrange issue types to change how they appear in the **Type** field on issue records. Click the name of a type. Use the **Move Up**, **Move Down**, and **Move to Top** buttons to set their order.

Setting Up Issue Sources

Use the Issue Sources list to create new choices for the Source field on issue records. Selecting the source of an issue lets assignees know who is affected by the issue. It also helps you search and report on how issues are reported.

To set up issue sources:

1. Go to Issues > Setup > Issue Sources.
2. On the **Issue Sources** list, click the last row if it is not already selected. This row should be blank.
3. In the **Name** column, enter a name for the source you want to add.

   This name will be available to select in the **Source** field on issue records.
4. In the **Description** column, enter a brief description of what types of issues are created with this source.
5. Click **Add**.
6. Click **Save**.

To edit an existing issue source, click the name of the source to make it editable. Change the name or description, and then click **Done**. To delete a source, click the name, and then click **Remove**.

You can rearrange issue sources to change how they appear in the **Source** field on issue records. Click the name of a source. Use the **Move Up**, **Move Down**, and **Move to Top** buttons to set their order.

Setting Up Issue Reproducibility

Use the Issue Reproducibility list to create new choices for the Reproduced field on issue records. Issue Reproducibility lets people working on the issue know where they can reproduce the issue and diagnose the problem.

To set up issue reproducibility:

1. Go to Issues > Setup > Issue Reproducibility.
2. On the **Issue Reproducibility** list, click the last row if it is not already selected. This row should be blank.
3. In the **Name** column, enter a name for the reproducibility selection you want to add. For example, you may want to add a browser name where the issue can be reproduced.

   This name will be available to select in the Reproduced field on issue records.
4. In the **Description** column, enter a brief description of what types of issues are reproduced in this manner. You can also enter how to reproduce issues in this manner.
5. Click **Add**.
6. Click **Save**.

To edit an existing issue reproducibility type, click the name of the reproducibility type to make it editable. Change the name or description, and then click **Done**. To delete a reproducibility type, click the name, and then click **Remove**.

You can rearrange issue reproducibility types to change how they appear in the **Reproduced** field on issue records. Click the name of a reproducibility type. Use the **Move Up**, **Move Down**, and **Move to Top** buttons to set their order.

Setting Up Issue Tags

Issue tags let you attach consistent keywords to issue records, enabling employees to search and classify issues by tags.

For example, an electronics company creates the following tags: audio clarity, CD skipping, and video clarity. A support rep receives a case on poor CD quality with skipping. The rep enters an issue record and selects CD skipping and audio clarity as tags. Later, another employee needs to search issues for audio problems. The employee can search by the audio clarity tag for more accurate results than entering keywords.

To setup or edit issue tags, ensure you have access to a role which has the Issue Setup permission. For information on adding permissions to a role, see the help topic Setting Permissions.

To set up issue tags:

1. Go to Issues > Setup > Issue Tags > New..
2. In the **Issue Tag** field, enter the name of this tag, or keyword.
3. In the **Product Team** field, select the team associated with this tag.

   This team appears in the **Product Team** field on issue records when this tag is selected. This is true when another product team has not already been selected.
4. Click **Save**.

To edit issue tags, go to Issues > Setup > Issue Tags. Click Edit next to the tag you want to change.

Working with Products and Modules

Products on issue records help determine which product team should handle issue resolution. To further define what area of a product is affected by an issue, you can asign a module to it. Modules are sub-sets of a product. For example, an issue affecting smart phones can be narrowed down further by specifying screen digitizer.

To create products and modules:

1. Go to Issues > Setup > Products > New.
2. In the **Product** field, enter a name for this product.
3. In the **Description** field,
4. To add a module to this product, enter a name for the module in the **Module** column.
5. In the **Description** column, enter a description for the module.
6. Click **Add**.
7. Repeat steps 4 to 6 to add multiple modules.
8. Click **Save**.

Setting Up Product Versions

If you track multiple versions of the same product, you can create versions and builds using the product record. A Versions subtab is available on product records that have been created and saved.

To set up versions for a product:

1. Go to Issues > Setup > Products.
2. Click **Edit** next to the product you want to create versions for.
3. On the product record, click the **Versions** subtab.
4. Click **New**.

   A product version record opens in a new window.
5. In the Product Version window, enter a name for this new version.

   For example, if this is version 5 of a software product, you would enter 5.0.
6. Enter a brief description that defines this version.
7. If this version is not yet released, enter the expected availability date in the **Expected Release Date** field.
8. Check the **Allow Broken In** box to allow this version to be selected in the **Broken In** field on issue records.
9. Check the **Allow Target** box to allow this version to be selected in the **Target** field on issue records.
10. Check the **Allow Fixed In** box to allow this version to be selected in the Fixed In field on issue records.

    > **Note:** Administrators still see all versions in the corresponding lists on issue records. Others only see versions listed in the lists they are marked to appear in.
11. Check the **E-fix** box if this version is a patch or emergency release.

12. To display the product version in the Product Versions portlet, use the following instructions:
    a. On the **Issues** tab in the Support Center, check the **Show in Portlet** box.
    b. Enter a version description.
13. In the **External Name** field, enter a name for this version that should display when customers view issue records in the Customer Center.
14. If you track builds for versions, enter a build name in the Build column.
15. In the **Build Date** column, enter the date for this build.
16. Check the **Allow Broken In**, **Allow Target**, and **Allow Fixed In** boxes to let the build be selected in these fields on issue records.
17. In the **Description** column, enter a brief description defining the build.
18. Click **Add.**
19. Repeat these steps for each build associated with this version.
20. Click **Save**.

Associating Products and Items

Products are tracked separately from item records, but you can associate product records with item records for reference purposes. You can associate a product with multiple items, but an item can only be associated with a single product.

To associate items with a product:

1. Go to Issues > Setup > Products.
2. Click **Edit** next to the product you want to attach items to.
3. On the Items subtab, select an item to associate with the product.
4. Click **Attach**.

   This automatically selects the product on that item's record.
5. Repeat these steps for each item you want to associate with this product.
6. Click **Save**.

To remove an item from a product record, click Remove next to the item's name on the Items subtab of the product record. Removing an item from a product record removes the product from the Product field on the item record.

> **Note:** Those using the Issue Administrator role cannot select products on items. You must have someone using the account Administrator role complete this step.

To associate a product with an item:

1. Go to Lists > Accounting > Items.
2. Click **Edit** next to the item you want to associate with a product.
3. On the **Basic** subtab, in the Product field, select the product you want to associate with this item.

   This automatically adds the item to the Items subtab of the product record.
4. Click **Save**.

Creating Issue Role Types

You can create issue role types to set defaults for a group of employees who use issue records regularly. An issue role type defines what settings an employee can place on an issue record. For example, whether they can mark issues as Fixed or be selected in the Reviewer field.

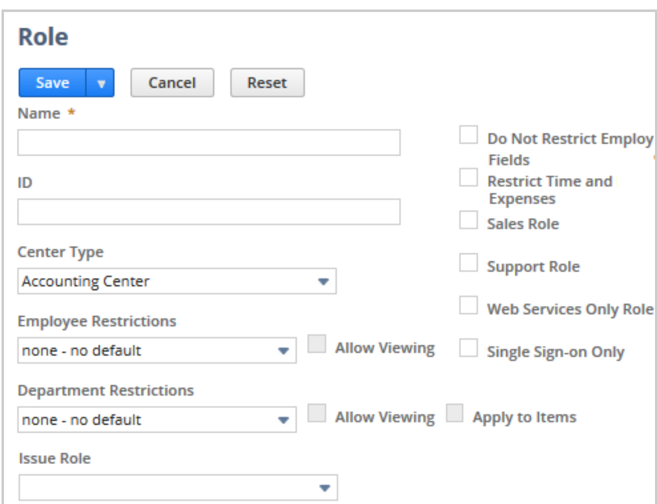
When you create a new issue role type, someone with the Administrator role must associate the issue role with a user role. The can do this at Setup > User/Roles > User Management > Manage Roles.

The following default user roles are already associated with issue role types:

- Engineer
- Engineering Manager
- QA Engineer
- QA Manager
- Product Manager
- PM Manager
- Support Person
- Support Manager
- Issue Administrator

To give an employee access to issues, you can choose to assign a default role to the employees on the employee record. You can also assign an issue role type to the employee's user role at Setup > Users/Roles > User Management > Manage Roles.

To edit or customize a role to give access to issue records, select the issue role that corresponds to the type of access needed.



Issue Role Type (assigned on role)	User Role (assigned on employee record)	Issue Permissions of User Roles
Development	Engineer	Issue Reports
	Engineering Manager	Edit/Create Issue Records
		Mark Issues as Showstoppers
Quality Assurance	QA Engineer	Issue Reports

Issue Role Type (assigned on role)	User Role (assigned on employee record)	Issue Permissions of User Roles
	QA Manager	Edit Issue Records Mark Issues as Showstoppers
Product Management	Product Manager PM Manager	Issue Reports Edit/Create Issue Records Mark Issues as Showstoppers
Support	Support Person Support Manager	Edit/Create Issue Records
Administrator	Issue Administrator	Issue Reports Edit/Create Issue Records Mark Issues As Showstopper Issue Setup (statuses, issue roles, etc.)

You can issue role types to determine how each type of employee can edit issues using the Manage Status Transitions page. For more information, see Managing Issue Status Transitions.

To create an issue role type:

1. Go to Issues > Setup > Issues Roles > New.
2. In the **Issue Role** field, select the name of this issue role type.

   You can select this role in Issue Role fields when you create or edit user roles, employee groups, and status transitions. You will also be able to select this role type in the **Assigned To** column when you create or edit issue statuses.
3. In the **Description** field, enter a brief description defining the purpose of this issue role.
4. Check the **Administrator** box if this employees with this role type should have access the following pages used for setting up the Issue Management feature:
   - Set Up Issues
   - Issue Statuses
   - Issue External Statuses
   - Issue Severities
   - Issue Priorities
   - Issue Types
   - Issue Sources
   - Issue Reproducibility
   - Issue Tags
   - Products
   - Issue Roles
   - Manage Status Transitions
5. Check the **Reviewer** box if employees using this role type should be available for selection in the Reviewer field on issue records.
6. Check the **Can Fix Issues** field to allow employees with this role to set issue statuses to a base status of Resolved.

7. Check the **Restrict Assignees** box to allow only employees with this role type to assign issues to other employees with this role type.

   > **Note:** To assign an issue to another role type, note the following. Employees using role types with this preference must change the status to an issue status linked to another role type.

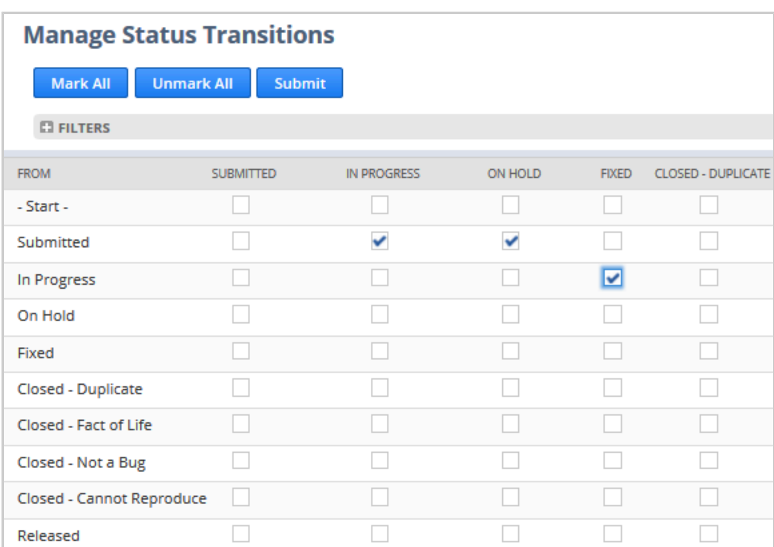
8. In the following fields, you can set the default selections for this role type for the respective fields on issue records:
   - **Severity** – Create and edit selections for this list at Issues > Setup > Issue Severities.
   - **Priority** – Create and edit selections for this list at Issues > Setup > Issue Priorities.
   - **Type** – Create and edit selections for this list at Issues > Setup > Issue Types.
   - **Source** – Create and edit selections for this list at Issues > Setup > Issue Sources.
   - **Reproduced** – Create and edit selections for this list at Issues > Setup > Issue Reproducibility.
   - **Product** – Create and edit products at Issues > Setup > Products.
   - **Module** – Create and edit modules for products at Issues > Setup > Products.
   - **Broken In** , **Target**, and **Fixed In Version and Build** – Create and edit product versions. You do this on the **Versions** subtab of product records at Issues > Setup > Products.
9. Click **Save**.

Managing Issue Status Transitions

On the Manage Status Transitions page you can decide the workflow of issue statuses. For example, you can decide that when an issue is created, its status can only be either Submitted, In Progress, or On Hold. Alternatively, when an issue has a status Released, you can decide that this issue status cannot be changed to any other status.

You can set up a status workflow for each issue role and issue type combination. For example, if you use four issue roles and two issue types, you can create up to eight unique status workflows.

Select the issue role and issue type before checking the boxes for which settings can be made on issue records.



Warning: If you have already submitted issues using the current status transition table, only make changes that ensure open issues can continue the resolution process. For example, an issue is assigned to a QA Engineer in the status of Fixed. You want to make sure that user role can either change the status to Closed, or reassign the issue.

The following should be completed before managing status transitions:

1. To set up issue types, see Setting Up Issue Types.
2. To set up issue roles, see Creating Issue Role Types.
3. To set up issue statuses, see Setting Up Issue Statuses.

Note: Administrator issue role types can use any status transition and are therefore not available in the Issue Role field on this page.

To manage issue status transitions:

1. Go to Setup > Issues > Manage Status Transitions.
2. In the **Issue Role** field at the bottom of the page, select the role type you want to manage statuses for.
3. In the **Issue Type** field, select the type of issue you want to set transitions for when employees use the role type you selected.
4. Click the **Mark All** button to check all boxes.
5. In the -Start- row, clear the boxes for each status you do not want available for an issue when it is first created.

   For example, you may want to clear the boxes in the status columns with a base status of **Closed**.
6. For each status in the **From** column, clear the boxes for any statuses that should not be available for the next stage in issue resolution.

   Each status row listed on the left side of the table represents the status an issue will be changing from. The status columns represent the possible statuses that an issue of that status can change to.
7. Click **Submit**.

You can return to this page at any time to edit your settings for each issue role and issue type.

Creating Employee Groups for Issues

You can create three types of employee groups for working with issues:

- **Product Team groups** - Can be selected in the Product Team field on issues. Product teams designate who is responsible for resolving an issue. Members of this team are sent an email notification when an issue is first entered so that everyone is aware of the problem.
- **Functional Team groups** – Can be emailed copies of the issue from the Communication subtab on issue records. You may want to check this box for all product team groups. Then, create additional function team groups for other teams you want to email.
- **Issue Role/Issue Queue groups** – Roles that correspond to the role of this group's members can assign this group to issues.

One group can be a product team and a functional team in addition to having an issue role if needed.

To create an employee group for issues:

1. Go to Lists > Relationships > Groups > New.
2. On the Create Group page, select **Static**.
3. Select **Employee** as the type of members you would like to include in the group.
4. Click **Continue**.
5. In the **Name** field, enter a name for this group.
6. Select the owner of this group. You are selected by default.

   Only the owner of a group can add or remove members or delete the group.
7. In the **Email** field, enter an email alias for this group.

   > **Note:** The group email address is used for non-issue notification email. For example, when composing an email you can use this address to cc the group. Issue notifications, however, are sent directly to the group members' individual email address.
8. Check the **Product Team** box if this group is responsible for managing issues for a particular product.

   You can select product team groups on issue records and associate them with issue tags. When a tag associated with a product team is selected on an issue record, the related product team is automatically selected.
9. Check the **Functional Team** box to let this group be emailed from the **Communication** subtab on issue records. Email is sent from the address in the Email field on this group record.

   If this group is a product team or issue queue, this option emails the group a copy of the issue record, when needed.
10. In the **Issue Role** field, select an issue role type to make this group an issue queue. Assigning an issue role allows the group to be assigned to issues using the defaults and status transitions for that role type.

    Employees with the **Restrict Assignees** issue role type can assign issues to issue queues when they assign issues outside of their role type.

    For example, a support person with restricted assignees can assign a new customer-reported issue to a QA Investigation issue queue/group. A member of the QA Investigation group can then assign the issue to the appropriate person for further investigation.
11. On the **Members** subtab, do the following to add members to this group:.
    - To add individual members, enter part of a member's name in the **Name** column, and press Tab. Select a member, and click Add. Repeat these steps for each member.
    - Click **Add Multiple**, and hold CTRL to select more than one member from the list.
    - Click **Add With Search** to enter search criteria for the members you want to add.

    You can use more than one of these methods to add members to the same group. For example, you can select a few members individually and then add all the members that meet search criteria.
12. Click **Save**.

Customizing Issue Notification Email

You can customize the email sent to customers and employees to notify them of changes to issue records.

You can choose which issue notification templates to use at Setup > Issues > Preferences > Issue Preferences.

You can create custom templates at Setup > Company > Company Management > System Email Templates. Custom templates are scriptable, allowing you to add information from the issue record or a support case associated with the issue.

There are two standard templates available:

- Standard Issue Notification Email for Customers
- Standard Issue Notification Email for Employees

To customize a template:

1. Go to Setup > Company > Company Management > Sytem Email Templates.
2. Click **New Template** to create an entirely new template, or click Edit next to a template to make changes to an existing template.
3. On the **Templates** subtab, enter the subject of the email sent using this template.
4. To upload an html file to use as the template, select **File** and then select **New**.

   NetSuite uploads your file to you File Cabinet.
5. To create the template using the rich text editor, enter your text in the rich text field.
6. To insert a reference to a field in the email notification, select **Issue** or **Case** from the **Record Type** field. Then, choose the field you would like to include from the **Insert Field**.
7. Complete steps 4-6 for each language your company uses.

If you use NetSuite OneWorld, you can set up a template for each subsidiary. To do this, open the subsidiary record. On the **Preferences** subtab, click the **Issues** subtab, and select the customer and employee templates.

For more information on scriptable templates, see the help topic Scriptable Templates.

Logging Issues

You can log issues at Issues > Issues > Issues > New. After you create an issue record, you can attach the issue to case records.

To create an issue record:

1. Go to Issues > Issues > Issues > New.
2. Under Primary Information:
   1. In the **Issue Type** field, select the type of problem or request that needs resolution.
   2. In the **Product Team** field, select the group that handles issues of this type.
   3. In the **Assigned To** field, select the person or group who needs to do the next step in resolving this issue.

      If you issue role type is set to restrict assignees, you can only assign issues to others with the same issue role type as yours. To assign an issue to another role, you must leave this field blank. Then, you must change the status to one that is linked to another issue role type. Administrators can change this setting at Setup > Issues > Issues Roles.
   4. In the **Issue Status** field, select the status of this issue. The status indicates what needs to be done next to resolve this issue.
   5. In the **Severity** field, choose the severity level that describes how much this issue is interfering with use of the product.

6. In the **Priority** field, select a priority from 1 to 5 for this issue.

   1 is the highest priority, and 5 is the lowest priority.
7. Check the **Showstopper** box if this issue is preventing the next product version.
8. In the **Abstract** field, write a brief description of the issue.

   This abstract shows both internally and in the NetSuite Support Center unless you enter an external abstract on the **External** subtab.

3. Under Problem Information:
   1. In the **Item** field, select the item this issue is about.
   2. In the **Product** field, select the name of the product this issue is about.

      To create product records, go to Issues > Setup > Products > New.
   3. In the **Module** field, select the module type for the product. Modules are created and added on each product record.
   4. In the **Source** field, select how you were made aware of this issue.
   5. In the **Reproduced** field, select whether or not this issue has been reproduced and where.
   6. In the **Tags** field, select keywords associated with this issue.

      Selecting tags makes this issue easier for others to find when searching.
   7. In the **Broken In Version** and **Build** field, select the product version and build experiencing the issue.
4. Click the **Details** subtab.
5. In the **New Details** field, enter a detailed description of the issue, information on where problems are occurring and steps to reproduce.
6. Click **Save**, or click the **Communication** subtab to email other employees or set up notification email.

To close an issue:

1. Go to Issues > Issues.
2. **Edit** the required issue.
3. From the **Issue Status** field, select the reason for closing the issue.
4. Click **Save**.

To email an issue:

1. On the issue record, click the **Communication** subtab.
2. Check the **I Own This Issue** box to be assigned to this issue when it is sent back to the status for your issue role.

   For example, an engineer enters a fix for an issue and then sets the status to **Fixed**. Then, the engineer assigns the issue to the QA issue queue. When a QA engineer tests the issue, they still experience the issue. The QA engineer then sets the status back to **In Progress**. Because this status is associated with the Development role type, the issue is automatically assigned back to the same engineer.

   There can only be one owner per issue for each issue role type.

   This preference is not available unless the **Use Last Assignee** box is checked at Issues > Setup > Issue Preferences.
3. In the **Email Me When** field, select when you would like to be emailed a current copy of this issue.

4. Check the **Email Assignee** box to send a copy of this issue to the person selected in the Assigned To field above.
5. In the **Copy Employees** field, you can select employees to send copies of this issue.
6. In the **Email Functional Teams** field, select the employee groups you want to copy on this issue.

   Emailing a group sends an email to the address saved on the group record. It does not send email to individual group members.
7. Click **Save**, or click the **External** subtab to enter an abstract and details to display to customers.

To enter an external abstract and details:

1. On the issue record, click the **External** subtab.

   Information entered on this subtab is displayed to customers when they view issues in the Customer Center.
2. In the **External Abstract** field, enter an abstract for this issue that can be displayed to customers.
3. In the **External Details** field, enter details on the issue that can be displayed to customers.
4. Click **Save**.

You can now attach this issue to cases on the **Issues** subtab of the case record.

Linking Issues with Cases

You can create or attach issue records on existing case records to associate issue resolution with case resolution. When you link issues with case records, support reps working with cases can see the progress of the related issue and keep the customer up-to-date.

To link issues with a case record:

1. Go to Cases > Customer Service > Cases.
2. Click **Edit** next to the case you want to associate with an issue.
3. On the **Related Records** subtab.
4. Choose one of the following to attach an issue:
   - Select the issue number in the **Issue** field, and click **Attach**
   - Click **New Issue** to create an issue for this case in a new window. After you save the issue and return to the case record, click **Attach** to add the new issue record.
5. Click **Save**.

You can have a case close automatically when all attached issues are set to a base status of **Closed**. Go to Issues > Setup >Issue Preferences. Check the **Automatically Close Linked Cases** box.

Cases can only close automatically if they are in a status set to allow auto-closing with resolved issues. To set a status to allow auto-closure, edit the case status at Setup > Support > Setup Tasks > Case Statuses. Check the Auto Close With Issues box.

> **Note:** You enable automatic closure of linked cases and set the status of the case to allow auto-closure. The case also closes when all linked issues are removed.

For example, Wolfe Electronics has a case titled **Can't Access Download**. It is linked to issue 421, where several customers purchased a download but were unable to reach it in the Customer Center. The Can't Access Download case has a status of **Waiting For Customer Response**. It maintains this status during the time the support team verifies that this is the same problem documented in the issue. The Waiting For Customer Response status is not set to auto-close with issues. During the time the case is in this status, the issue is resolved and closed. The customer responds to let support know the problem is the same as the issue. The case status changes to **Pending Issue Resolution**, which is set to auto-close with issues. When the case status changes to Pending Issue Resolution, it is automatically changed to **Closed-Issue Resolved**. NetSuite changes the status because the only linked issue was already closed.

Working with Related Issues

In NetSuite, you can specify relationship types or links between issues. For example, when the relationship type is set to Blocks or Is blocked by, you can search for an issue that blocks another issue. The relationship type is displayed on each issue in the relationship, as well as indicating which issue influences which. The type Relates to is an exception to this rule, as each issue can affect each other.

To define issue relationships:

1. Go to Lists > Support > Issues.
2. Click **View** next to the case you want to associate with an issue and edit the issue.
3. On the **Related Records** subtab click **Issues** and add the wanted relationship.
4. Select one of the following to attach an issue:
   - Select the issue number in the Issue field, and click **Attach**
   - Click **New Issue** to create an issue for this case in a new window. After you save the issue and return to the case record, click Attach to add the new issue record.
5. Click **Save**.

The following relationship types are available:

- **Blocks/Is blocked by** - This relationship shows which issue blocks another and the issue that is blocked by it.
- **Duplicate of/Duplicated by** - This relationship shows which issue is a duplicate and the issue that is duplicated by it.
- **Follow up for/Followed up by** - This relationship shows which issue follows up another issue and the issue that is followed up by it.
- **Injects/Injected by** - This relationship shows which issue causes another issue and the issue that is caused by it.
- **Is required for/Depends on** - This relationship shows which issue is required for another issue and the issue that depends on it.

Filtering Issue Notifications Using Outlook Rules

Issue notification email messages contain a text field in the mail header explaining why you are receiving the notification. You can use this information to create filtering rules in Outlook, or similar email clients, to manage your incoming message flow.

There are seven notification reasons. An individual message header can contain one or more of them:

- **ASSIGNED_EMPLOYEE** - issue was assigned directly to you (the Email assignee box was checked, or the assignee was changed)
- **ASSIGNED_TEAM_MEMBER** - issue assigned to a group in which you are a member. (as above, but the assignee is a group, not an individual)

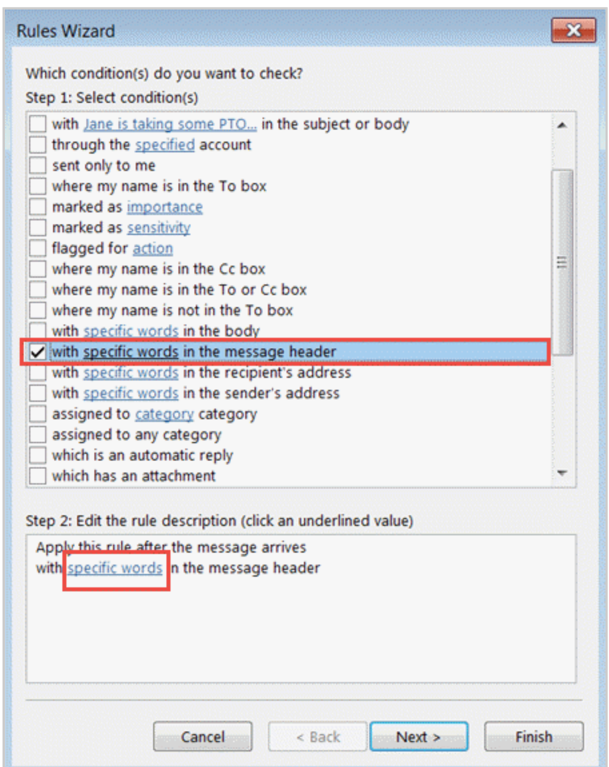
- **ASSIGNED_REVIEWER** - you have been assigned to review this issue
- **ISSUE_WATCHER** - you are watching this issue and the Email me when criteria for this issue has been met
- **COPIED_EMPLOYEE** - the author of the issue selected you in the Copy employees field
- **EMAILED_TEAM_MEMBER** - the author of the issue selected a team of which you are a member
- **PRODUCT_TEAM_MEMBER** - you are a member of a product team group which has been assigned to the issue

  Tthis type of notification is sent only when the product team changes, or when a new issue is filed.

The following procedure is aimed at users of Outlook 2016. However, it is common to most email clients supporting rules creation.

To set up a rule in Outlook 2016 to filter issue notifications:

1. Right-click on any message in the **Inbox** and select **Rules > Create Rule**.
2. Select **Advanced Options**.
3. Check the **with specific words in the message header** box.



4. Click the **specific words** link in the box marked **Step 2**.
5. Copy the required notification reasons from the list above, for example ASSIGNED_TEAM_MEMBER.
6. Paste the notification reason into the **Search Text** box. Click **Add.**
7. When you have finished adding required notification reason(s), click **OK**.
8. Click **Next**.
9. Select what you want to do with the messages (for example move to a folder). Check the box and click **Next**.
10. Specify any exceptions to this rule. Click **Next**.

11. Edit the name for this rule. Select the **Setup rule options**, and click **Finish**.

Knowledge Base

The Knowledge Base feature helps you organize and publish information specific to your business. You can create knowledge bases to organize FAQ or to publish information to your NetSuite account and website. NetSuite knowledge bases are flexible, solutions can be organized into multiple topics and subtopics, allowing for efficient indexing and accessing of information.

Building a knowledge base has many positive impacts on your business. A knowledge base can reduce the number of customer service cases because customers can use the Customer Center and find answers to their issues. For information on how to set up a knowledge base, see Setting Up a Knowledge Base.

Creating solutions for your knowledge base shortens the time your support reps spend answering cases. Solutions can be quickly found, attached to the case record, emailed to the customer and the case closed.

Some common uses for knowledge bases are:

- answers to frequently asked questions
- a structured environment to quickly access solutions
- detailed trouble shooting procedures and tutorials
- articles and advice which enable customers to solve their own issues quickly

For example, several customers requested information on the sound quality of speakers they purchased from you. Your customer support reps might want to create solutions explaining how to solve the problem. These solutions can be published under a topic in a knowledge base. The main topic would be called **Speakers** with a subtopic of **Speaker Sound Quality**. Support staff would then create solutions and attach them to the relevant subtopic. When you publish a topic, all subtopics and solutions attached to these subtopics are also published.

Knowledge Base Setup Checklist

Use the checklist below to help you quickly set up your knowledge base.

#	Task
1	Creating Knowledge Base Topics
2	Creating Knowledge Base Solutions
3	Publishing a Knowledge Base

Administrators can complete each item on the checklist.

Support Persons create topics and solutions, but cannot approve solutions.

Support Managers or Support Administrators approve solutions and publish content.

Setting Up a Knowledge Base

Knowledge bases lets you organize and deliver information specific to your business. Knowledge bases can increase the efficiency of your support reps and increase communication within your company.

To enable the Knowledge Base feature:

1. Go to Setup > Company > Enable Features.
2. Click the **CRM** subtab.
3. Under Support, check the **Knowledge Base** box.

   You must have the **Customer Relationship Management** feature enabled before you use **Knowledge Base**.
4. Click **Save**.

Enabling **Knowledge Base** creates links to topics, solutions, and to knowledge base publishing on the Lists > Support > Topics.

You can create a hierarchy of topics and subtopics to organize your knowledge base solutions. When you create a new topic, you can place this topic under a parent topic by selecting the parent topic in the **Subtopic Of** field.

Solutions are attached to topics and subtopics. When you publish a parent topic, the subtopics and solutions under that parent topic are also published.

You can change the order that subtopics appear when published. Go to Cases > Customer Service > Topics. Click **Edit** next to the topic you want to arrange. On the topic record, click the **Subtopics** tab. Use the **Move Up**, **Move Down**, **Move to Bottom** and **Move to Top** buttons to place the subtopics in the required order. Solutions can also be ordered in this way.

Knowledge bases are organized by topics and subtopics that contain solutions. You can create multiple knowledge bases that target groups of people you work with. For example, you might want to create a knowledge base that your support reps use to organize solutions for common case issues. You might create and another knowledge base for your human resources department to use to post benefit forms or employee directories.

You can also create a single knowledge base and pick specific topics and subtopics to publish to the groups of people you work with.

Creating Knowledge Base Topics

Knowledge base solutions are organized by a hierarchy of topics and subtopics. When you publish a topic, you also publish its subtopics and the solutions attached to these subtopics.

> **Note:** Administrators must assign the Knowledge Base permission to a user before they can create and publish a knowledge base article, setting the level to Full. For information on how to assign permissions, see the help topic Using the Global Permissions Feature.

To create a topic:

1. Go to Cases > Customer Service > Topics > New.
2. In the **Title** field, enter a name for this topic that solutions and subtopics can be organized under.

   For example, if you will be entering several solutions on fixing the sound quality of your speakers, create a topic titled **Speaker Sound Quality**.

   This title shows in the **Topics** list, in a published knowledge base and as a choice on the **Topics** subtab of solution records.
3. If this topic is a subtopic of a more general topic, select the parent topic in the **Subtopic Of** field.
4. In the **Brief Description** field, enter a description for this topic.

   The brief description shows with the title on the Topics list and wherever this topic is published.

5. In the **Detailed Description** field, enter a longer and more specific description of this topic and its contents.

   The detailed description shows when the topic title is clicked.

   You can enter HTML and javascript in this field.
6. Click **Save**.

After saving the knowledge base topic, four subtabs are added to the topic record:

- **SubTopics** - create additional subtopics and reorder list.
- **Solutions** - append solutions to the topic and reorder list.
- **Notes** - add notes relating to the topic and view the system notes.
- **Publish** - edit which knowledge base the topic belongs to and where it appears in the topic hierarchy.

For more information about publishing topics, see Publishing a Knowledge Base.

When a topic is published, you can click the **Publish** subtab of the topic's record to see where it is published.

When you have created your topics and subtopics, you can create solutions to place in these topics. Enter new solutions at Cases > Customer Service > Solutions > New. For more information about creating solutions, see Creating Knowledge Base Solutions.

If solutions or subtopics are placed in a topic, you cannot delete that topic, but you can inactivate it.

When you inactivate a topic:

- The topic's subtopics are inactivated.
- It no longer appears in the Topics list.
- You can not select the topic on Solution records.
- Its subtopics and solutions are removed from the tabs and categories they are published to.

Solutions on inactive topics can still be published in other active topics.

Creating Knowledge Base Solutions

Solutions are answers to customer issues. They may include instructions, FAQ, or information on a product or service.

You may want to create topics and subtopics before creating your solutions. To create topics and subtopics, go to Cases > Customer Service > Topics > New.

For more information about publishing your topics and solutions, see Publishing a Knowledge Base.

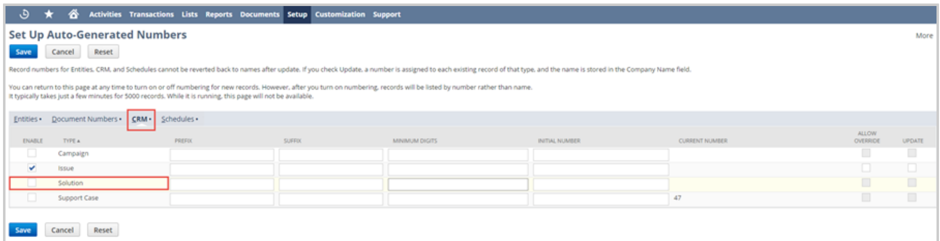
You can attach solutions to multiple topics and subtopics to build knowledge bases. You can also attach solutions to support cases to allow a quick response to customer issues. For information on attaching solutions to cases, see Attaching Knowledge Base Solutions to Cases.

> **Note:** **Knowledge Base** must be enabled in Company > Setup > CRM > Support before you can create solutions.

To create a solution:

1. Go to Cases > Customer Service > Solutions > New.
2. Under Primary Information:
    1. Enter or edit a reference code / number in the **code** field. This field is already filled if auto-numbering is enabled.

        > **Note:** Administrators can enable auto-numbering for solutions at Setup > Company > Auto-Generated Numbers.

    2. In the **Title** field, enter a title or name for this solution.

        This title shows on the **Solutions** list and in a published knowledge base. When attaching solutions to cases or placing solutions in topics, you can search by code or by title.
    3. In the **Assigned To** field, select the employee this solution is assigned to.

        This could be the person that is assigned to maintaining the content of this solution or the person who is responsible for approving it.
    4. In the **Status** field, select one of the following:
        - **Approved** – This solution has been reviewed by a supervisor and is ready for publishing.
        - **Unapproved** – This solution has been created but not reviewed. Unapproved is selected by default.

        Unapproved solutions cannot be published.

        > **Note:** You can allow only **Approved** solutions and solutions marked **Display Online** to be attached to case records. Go to Setup > Support > Support Preferences. Check the **Only Link Approved Solutions to Cases** box.

    5. Check the **Display Online** box to allow this solution to be displayed on your website.
3. Under **Solution Information**
    a. In the **Abstract** field, enter a brief description of what problem is resolved. The abstract appears alongside the title.
    b. In the **Description** field, enter the solution. You can include HTML and Javascript
4. On the **Topics** subtab, select a topic or subtopic you want to categorize this solution under for publishing.
5. Click **Add**.
6. Repeat these steps for each topic or subtopic you want to place this solution under.
7. On the **Related Records** subtab, do one of the following to attach a related solution to the solution you are creating:
    - Enter part of the name of the solution, and press **Tab**.
    - Click **List** to select a related solution from the solution list.
    - Click the **New** icon to create a new related solution.
8. Click **Add**.

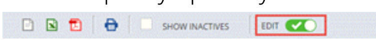
9. Repeat these steps for each related solution you want to add.
10. Click the **Communication** subtab to add notes relating to this solution.
11. Click the **System Information** subtab and check the **Inactive** box if you want to inactivate the solution

    > **Note:** After the solution has been created, **Date Created** and **Last Modified** timestamps are added to the **System Information** subtab.

12. Click **Save**.

After you create solutions and attach them to topics and cases, you can publish your knowledge base. Go to Cases > Customer Service > Knowledge Base > New.

You can also create a solution from your response to a support case as you reply. To do this, click **New Solution** on the case record on the **Communication** subtab. A new solution record opens and the text from the Reply field is shown in the solution's Description field. For more information, see Attaching Knowledge Base Solutions to Cases.

You can quickly update your solutions from the Solutions list if you use the inline editing feature 

. To edit solutions from the list, click the **Edit** link at the top of the list. If you want to change which fields show in the columns on the list, click **Customize View**. For example, you can add the **Date Created** and **Last Modified** date to the list view for quick reference. For more information, see the help topic Using a Saved Search as a View.

> **Note:** New solutions and updates to existing solutions are indexed nightly. Search results do not register changes you make until the next day.

Publishing a Knowledge Base

The Knowledge Base feature is a valuable tool for organizing and delivering information to your customers, employees, and others you do business with.

You can publish a knowledge base in your NetSuite account or in categories of your website. You can also choose to publish knowledge bases to specific people, groups or roles. Common applications for a knowledge base include:

- Organizing solutions that support reps can search and attach to cases
- Conveying information to employees through access to your account
- Providing information to customers through your Web site

To publish a knowledge base:

1. Go to Lists > Support > Knowledge Base > New
2. Select the topic you want to publish.

   All solutions attached to this topic and its subtopics are published with this topic.
3. If you use the Multiple Web Site feature, select the Web site you are publishing this knowledge base to.
4. In the **Publish To** field, select the tab or category you want to publish this topic under.
5. Check the **Display in Web Site** box to publish this topic on your Web site.

You do not need to check this box to publish this topic in your account. For more information on publishing to an internal tab, see the help topic Publishing Information to an Internal Site.

6. On the **Audience** subtab, select who you want to have access to this knowledge base from the following lists:
   - **Roles** – Anyone with selected roles sees this knowledge base when they log in to your account using the role you select here.
   - **Employees** – Selected employees see this knowledge base when they log in to your account, regardless of which role they use.
   - **Department** – Employees in selected departments see this knowledge base when they log in to your account, regardless of which role they use.
   - **Groups** – Members of selected groups see this knowledge base when they log in to your account, regardless of which role they use.
   - **Customers** – Selected customers see this knowledge base when they log in to the Customer Center or on your Web site.
   - **Vendors** – Selected vendors see this knowledge base when they log in to the Vendor Center.
   - **Partners** – Selected partners see this knowledge base when they log in to the Partner Center.

   Click –New – in a field to create a new record of that type.
7. Click **Save**.

When you publish a topic, all subtopics and solutions under this topic are accessible to anyone with access to the published topic. Topics can only be published if they are active and the tab or category where they are published is assigned an audience.

You can search for solutions only in the context of the knowledge base. For example, you published the knowledge base to a certain tab on your site. You must click that tab, and then run the search.

Solutions can only be published if the following conditions are met:

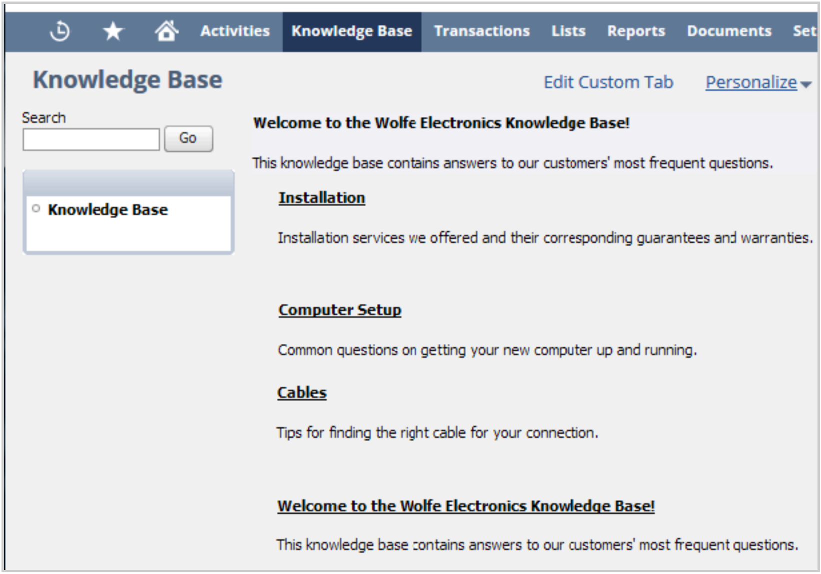
- The solution is active.
- The Display Online box is checked on the solution record.
- The status of the solution is Approved.
- An Audience is selected in the tab or category the solution is published to.
- The topic the solution is in must be active and published.

You can display a knowledge base as a center tab so that you can access it from the navigation menu. For more information, see Adding a Knowledge Base as a Center Tab.

> **Note:** Publishing a knowledge base to a Web site or intranet takes one hour to complete. This is also true if you make a change to a published knowledge base. Changes are not visible online until the process completes.

Adding a Knowledge Base as a Center Tab

You can display a knowledge base in the navigation menu as a custom tab, which can also be displayed on your website. Individual knowledge bases can be displayed on a role-by-role basis. For example, an HR knowledge base is visible only to users with an HR role, or a support knowledge base to technical support staff.



To display a knowledge base as a center tab, an administrator must enable the Intranet feature. Go to Setup > Company > Enable Features > Web Presence. On the **Publishing** subtab, check the box next to **Intranet** and then click **Save**.

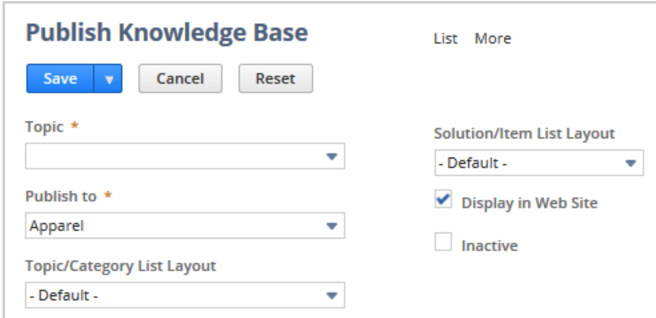
You must have completed the steps in creating topics (or subtopics) and solutions before adding a knowledge base as a center tab. If you have not created topics, see Creating Knowledge Base Topics. For information on assigning solutions to topics, see Creating Knowledge Base Solutions.

To add a knowledge base as a center tab:

1. Go to Setup > Intranet > Tabs > New.
2. Select **New Presentation Tab**. For more information, see the help topic Presentation Tabs.
3. Enter a name for this tab in the Label field. This name will appear on the navigation menu or on the website.
4. Check the **Display in Web Site** box if you also want to display this tab online on your website.
5. On the Audience subtab, select the roles, departments, individuals or groups who will have access to the knowledge base.
6. Click **Save**. The new presentation tab appears on the navigation menu.
7. Go to Lists > Support > Knowledge Base > New.
8. In the Topic field, select the topic that you want to publish in the new knowledge base presentation tab.
9. In the Site field, select a website where you want to publish this knowledge base.
10. In the Publish To field, select the tab that you have just created in Step 5.
11. Click **Save**.

Customizing Knowledge Base Layout

When you publish a knowledge base, you can choose a layout to apply to the topics and solutions that display on the page.



To select a layout for knowledge base topics and solutions:

1. Go to Lists > Support > Knowledge Base
2. Click **Edit** next to a knowledge base topic on the list.
3. You can select a layout in the **Topic/Category List Layout** field.
4. You can select a different layout to apply to solutions in the **Solution/Item List Layout** field.

NetSuite ignores the HTML in basic site theme templates selected in the **Topic/Category List Layout** or **Solution/Item List Layout** fields. Only the following properties for rows and columns specified in the layout are applied to the page:

- Border Style
- Column Width
- Number of Columns
- Number of Rows
- Row Height
- Row Padding
- Paginate
- Sort Links
- Items Are Laid Out
- Use Checkerboard Effect
- Sort By
- Descending

Note: Only the layouts selected in the Solutions/Item List Layout field display pagination and Number of Rows.

You can create a custom layout to use for your knowledge base topics and solutions. for more information, see the help topic Creating Web Site Layouts.

Arranging Solutions in a Published Knowledge Base

After adding solutions to a topic, you can rearrange the order of the solutions on the topic record.

To order solutions on a topic record:

1. Go to Cases > Customer Service > Topics.
2. Click **Edit** next to the topic you want to reorder solutions under.
3. Click the **Solutions** subtab.
4. Click a solution to select it.
5. Use the **Move to Top** and **Move to Bottom** buttons to arrange them.
6. Click **Save**.

When you click on a topic in a published knowledge base, the solutions are listed in the order you selected.

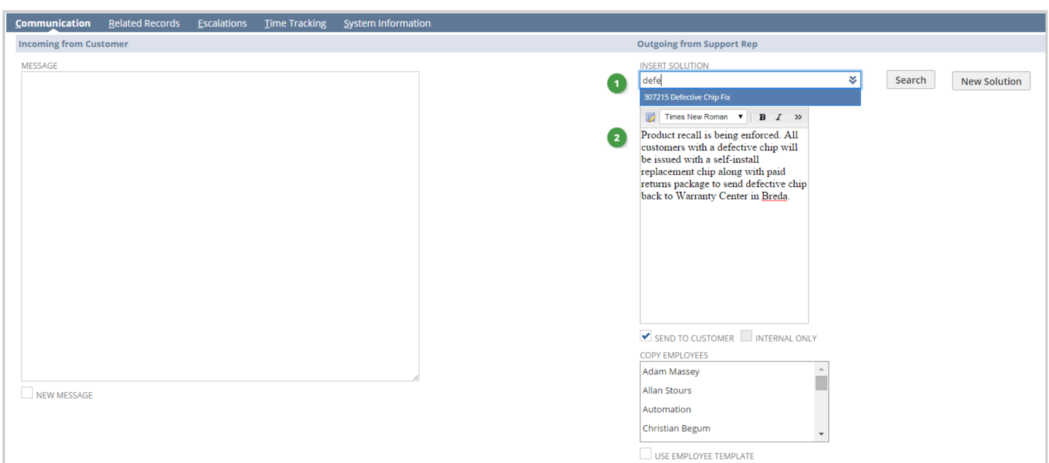
Attaching Knowledge Base Solutions to Cases

A Support Person can search your knowledge bases for solutions relating to the support case they are working on. These solutions can then be appended to cases and emailed to your customers, thus saving response time and duplication when handling common case issues.

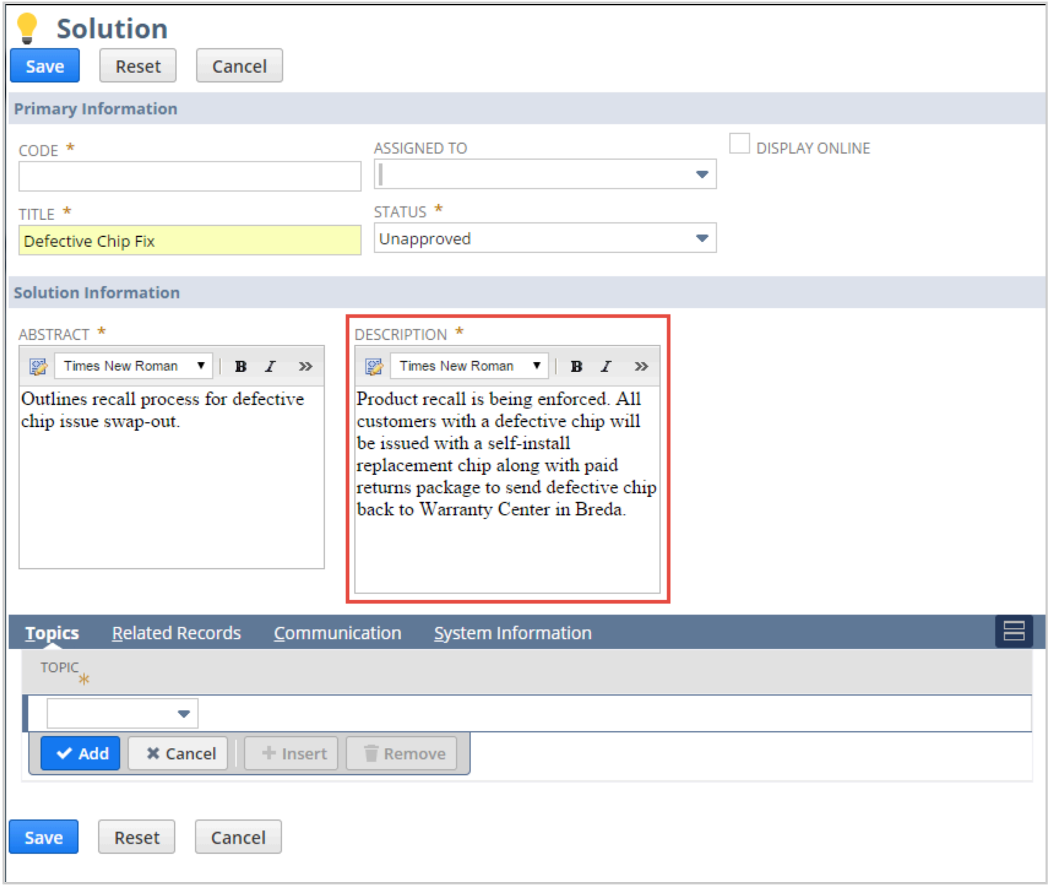
To attach a solution to a case:

1. Open the case record you want to attach a solution at Cases > Customer Service > Cases.

   If you are adding a solution to an existing case, click **Edit** on the case record.
2. To attach a solution, do **one** of the following:



- On the **Communication** subtab, in the **Insert Solution** field, enter part of the solution title, and press **Tab**.
- Click **List** to choose a solution from the list
- Select **Search** to search for a solution using detailed criteria
- Select **New** to create a new solution record.



When you attach a solution to a case, the **Description** text of the solution is automatically added to the end of the message.

3. Make any edits to this text as required.
4. Click **Save.**

> **Note:** If you use a customized case form and want to attach knowledge base descriptions to case responses, include the **Description** field on the form.

Monitoring Support Performance

NetSuite provides a variety of alert and reporting tools to help support professionals effectively manage support cases and meet SLA requirements. For specific information, click the links below.

- Case Alerts on Support Cases
- Performance Metrics for Support Cases
- Support Reports

Case Alerts on Support Cases

Important: This document describes a beta feature. The contents of this feature are preliminary and may be changed or discontinued without prior notice. Any changes may impact the feature's operation with the NetSuite application. NetSuite warranties and product service labels shall not apply to the feature or the impact of the feature on other portions of the NetSuite application. NetSuite may review and monitor the performance and use of this feature.

Case Alerts enable users to receive an email notification whenever a case meets criteria predefined in a case saved search. They are intended to help support staff to respond proactively to customer issues, and minimize the risk of breaching any service level commitments. Case alerts can help decrease escalations, prioritise case work more efficiently, and keep support staff focussed on the big picture.

Case Alerts allows users to assign customized email templates to individual alerts, providing greater flexibility and presentation options for the requested information. Some typical use cases of case alerts include:

- **High Priority** - send an alert to the support manager detailing all high priority cases in the past 24hrs.
- **On Hold** - notify the support manager of any cases that have been on hold for more than 24 hours
- **Incremental SLA** - send an alert of impending conditions; for example, when a case has elapsed 75% of its SLA response time.

Prerequisites for Case Alerts

Before using Case Alerts, make sure the following tasks are completed in your NetSuite Account:

- Enable the **Customer Support & Service** - Setup > Company > Enable Features > CRM > Basic Features > Customer Support & Service feature.
- Ensure users needing to set up case alerts have been granted the Case Alerts permission. By default, this is applied to Support Manager and Support Administrator roles. The Case Alerts permission is accessible from the Permissions > Setup subtab on the Role record.

Setting up a Case Alert on Support Cases

There are two distinct stages to setting up a new case alert. First, we need to create a case saved search which will be used to monitor the required performance criteria. Once this is done, we create a new case alert and assign the various recipients and select the required email template.

Example 1. Four Hour Response Time

Wolfe Electronics has recently implemented a four hour response time pledge on all customer support cases. Any cases where the company did not reply to the customer within four hours of the case being created are investigated by the shift supervisor. In the following procedure, we'll set up a case alert that notifies the shift supervisor and support manager of any cases which breached this commitment.

To create a case saved search:

1. Go to Lists > Search > Saved Searches > New
2. Select **Case** as the search type.
3. Enter a name for the search in the **Search Title** field (Four Hour Reply Breaches)
4. From the Filter list, select **Support First Reply**.
5. Select **empty** from the list.
6. From the Filter list, select **Time Elapsed (hours)**.
7. Select **greater than** from the list.
8. Insert 4 in the **Value** field, and click **Set**.
9. From the Filter list, select **Status**.
10. Select **any of** and include all statuses except Closed. Click **Set**.
11. Click **Save**.

After the case saved search is created, you can proceed to the Case Alerts page to complete the set up. You can also proceed to this page if you want to use a previously prepared search.

To set up a case alert:

1. Go to Setup > Support > Case Alerts > New.
2. Enter a name for the alert.
3. Optional — provide a brief description of what the alert is for.
4. Select your previously saved search from the **Saved Search** list.
5. Use the Standard Case Alert Template, or select a customized system email template.

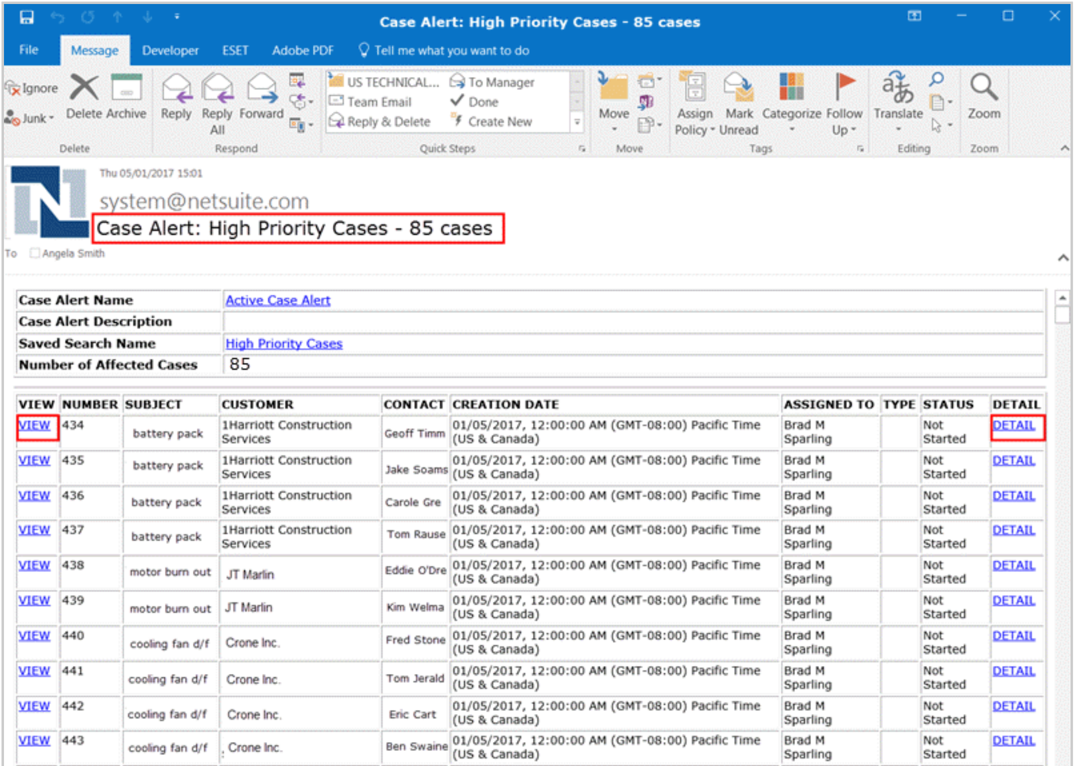
   For information on adding system email templates, see the help topic Customizing Templates for System-Automated Email
6. Select the owner of the alert.

   Alerts will be sent to them by default and their name used on the unsubscribe link on the standard case alert template.
7. Optional: check the **Send to Case Assignee**. box if you wish the assigned support representative to also receive the alert.
8. From the **Recipient** list, select employees or groups you want to receive the alert. Click **Add**.
9. Click **Save**.

Active case alerts are refreshed approximately every five minutes. If a saved search has an existing send schedule, this will be overruled by the case alert.

The Standard Case Alert Email Template

The Case Alerts feature includes a default email template that is fully customizable. You can access this template at Setup > Company > System Email Templates.

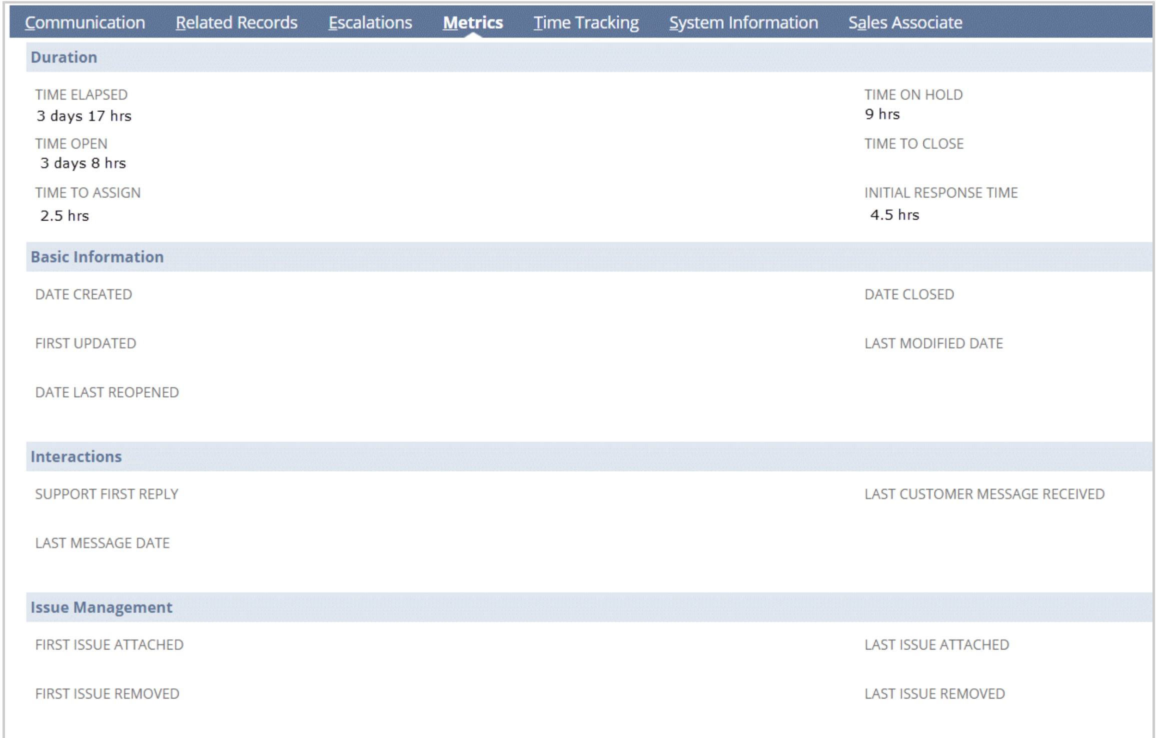


The subject header is derived from the case name used in the name field on the case alert record. The subject header also includes the number of cases that match the search criteria.

Click **View** to open the case record in NetSuite. Click **Detail** displays the message history for that case, which is displayed further in the body of the email.

Performance Metrics for Support Cases

NetSuite provides a comprehensive set of metrics for each support case. These metrics provide support managers greater visibility on how effectively a case is being handled. These metrics are available on the Metrics subtab of a case record.



Support managers can aggregate these metrics across all cases through the filters provided in a Case saved search. These filters can be used to monitor case performance across the organization, in particular with regards to SLAs (service level agreements). Combining these saved searches with the Case Alerts feature provides real-time monitoring and notification of potential SLA infringements. The following table shows the full list of available performance metrics for support cases. For more information on case alerts, see Case Alerts on Support Cases. For information on how to set up a support metric saved search, see Creating a Support Metric Saved Search.

Case Performance Search Filter	Description
Duration	
Time Elapsed (hours)	Total number of hours the case has been actively running, excluding time spent on hold.
Time On Hold (hours)	Total number of hours the case has been on hold since case creation.
Time Open (hours)	Total number of hours the case has not been on hold or closed. This includes standard statuses and customizations of Not Started, In progress, Escalated, Reopened.
Time to Close (hours)	The difference between Date Created and Date Closed.
Time to Assign (hours)	The time between when the case was created and when it was assigned
Initial Response Time (hours)	The duration between the time the case was created and the first response to the customer. A response is logged in the system when you perform any of the following actions from the case record: ▪ log a phone call ▪ log an event ▪ send an email message

	A response is also logged in the system when a workflow or script on the case record sends an email message. Automatic email notifications generated by the system do not affect the initial response time. For more information, see Customizing Support Notification Email.
Basic Information	
Date Created	The date and time when the case was created.
Date Closed	The date and time when the case was closed.
First Updated	The date and time when the case was first worked on (first edit).
Date Last Modified	The date and time when the case was last worked on.
Date Last Reopened	The date and time when the case was last changed from Closed to Re-opened.
Interactions	
Support First Reply	The date and time when the first reply message was sent to the customer.
Last Customer Message Received	The date and time of the last message received from the customer.
Last Message Date	The date and time of the last message received or sent related to the case.
Issue Management	
First Issue Attached	The date and time of when an issue was first attached to the case.
Last Issue Attached	The date and time of when an issue was most recently attached to the case.
First Issue Removed	The date and time of when an issue was first detached from the case.
Last Issue Removed	The date and time of when an issue was most recently detached from the case record.

Creating a Support Metric Saved Search

The case performance metric filters are for support managers to build support performance criteria and to assist with SLA monitoring. The following procedure creates a sample saved search to monitor any breaches of an SLA. Breaches requires all cases to be responded to within four hours of the initial creation time.

To create a support metric saved search

1. An admin should ensure the Customer Support and Service feature is enabled at Setup > Company > Enable Features > CRM > Customer Support and Service
2. Go to Lists > Search > Saved Searches > New. Click **Case**.
3. In the **Search Title** field, enter **All Cases With Response After 4 Hours**.
4. Select **Support First Reply** from the **Filter** list. Set to not empty.
5. Select Initial Response Time (hours). Set to greater than.
6. In the **Value** field, enter 4.
7. Click **Save and Run**.

Support Reports

The following standard support reports are available in NetSuite. Click a link for more information.

- Customer Service Reports
  - Closed Case Analysis Summary Report
  - Closed Case Analysis Detail Report
  - Open Case Analysis Summary Report
  - Open Case Analysis Detail Report
  - Closed Case Escalation Summary Report
  - Closed Case Escalation Detail Report
  - Open Case Escalation Summary Report
  - Open Case Escalation Detail Report
  - Case Activity by Support Rep Summary Report
  - Case Activity by Support Rep Detail Report
- Issue Management Reports
  - Open Issues Summary Report
  - Open Issues Detail Report
  - Closed Issues Summary Report
  - Closed Issues Detail Report

Closed Case Analysis Summary Report

The Closed Case Analysis Summary report is an overview of the cases that have been closed by each support rep. It also includes the average amount of time each support rep takes to close a case.

This report is organized by support reps and their respective managers. It is useful for getting an overview of how long it takes each support rep to close a case.

> **Note:** To track the time spent on a case more accurately, you might want to take advantage of On Hold case statuses. The On Hold case status temporarily pauses the time tracking for support reps answering and resolving cases until the status is changed. For more information, see Creating Case Statuses.

To see the Closed Case Analysis Summary report:

Go to Reports > Customer Service > Closed Case Analysis.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Closed Case Analysis Detail Report

The Closed Case Analysis Detail report displays a list of cases that have been closed, organized by the sales reps they were assigned to. This report includes each case number, the date started, date closed, number of solutions, origin, and time it took to close the case.

This report is organized by support reps. It provides information on how many cases each support rep closes in a set amount of time and the details of each case.

> **Note:** To track the time spent on a case more accurately, you might want to take advantage of On Hold case statuses. The On Hold case status temporarily pauses the time tracking for support reps answering and resolving cases until the status is changed. For more information, see Creating Case Statuses.

To see the Open Case Analysis Detail report:

Go to Reports > Customer Service > Closed Case Analysis > Detail.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report

- Report Customization
- Reporting Overview

Open Case Analysis Summary Report

The Open Case Analysis Summary report lists the total number of open support cases. It also provides the average time spent on a case by each support rep.

This report a glance at how efficiently your support team is handling cases, and how large your current case load is.

> **Note:** To track the time spent on a case more accurately, you might want to take advantage of On Hold case statuses. The On Hold case status temporarily pauses the time tracking for support reps answering and resolving cases until the status is changed. For more information, see Creating Case Statuses.

To see the Open Case Analysis Summary report:

Go to Reports > Customer Service > Open Case Analysis.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Open Case Analysis Detail Report

An open case analysis detail report lists the cases assigned to each support rep. It also shows case number, date created, status, time spent, last modified and company for each open case.

This report provides updates on what members of your support team are currently working on and how long each case has been open.

> **Note:** To track the time spent on a case more accurately, you might want to take advantage of On Hold case statuses. The On Hold case status temporarily pauses the time tracking for support reps answering and resolving cases until the status is changed. For more information, see Creating Case Statuses.

To see the Open Case Analysis Detail report:

Go to Reports > Customer Service > Open Case Analysis > Detail.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Closed Case Escalation Summary Report

The Closed Case Escalation Summary report shows you the number of closed cases that were escalated during the specified date range. You can click the number of cases in a section to view a list of cases for that date range.

To see the Closed Case Escalation Summary report:

Go to Reports > Customer Service > Closed Case Escalation.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report

- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Closed Case Escalation Detail Report

The Closed Case Escalation Detail report shows you the details from each closed case that was escalated in the specified date range.

This report includes the case number, the person it was escalated to, and the date the case was created. It includes when it was escalated, and the amount of time between the time it was escalated and the time it was closed. Click the case number or dates to view the case record.

The Last Modified column shows the date each escalated case was closed.

To see the Closed Case Escalation Detail report:

Go to Reports > Customer Service > Closed Case Escalation > Detail.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Open Case Escalation Summary Report

The Open Case Escalation Summary report provides the number of open cases that have been escalated and the respective date ranges they were escalated.

Click the number of cases to view a list of the cases for that date range. You can also click the name of an employee to view a list of cases that have been escalated to that employee. If there is only one case for a customer or date range, the case record opens.

To see the Open Case Escalation Summary report:

Go to Reports > Customer Service > Open Case Escalation.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Open Case Escalation Detail Report

The Open Case Escalation Detail report provides details from each escalated case. It provides the case number, who it was escalated to, the date the case was created, and the date and time it was escalated. Click the case number or the dates from the report to see further details on the case.

To see the Open Case Escalation Detail report

Go to Reports > Customer Service > Open Case Escalation > Detail.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options

- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Case Activity by Support Rep Summary Report

The Case Activity by Support Rep Summary report shows you the following for each support rep with case activity in the time period you set:

- **Support Rep** – name of Support Rep assigned to the case.
- **Total Cases** – total number of cases assigned to the Support Rep within the specified reporting period.
- **Avg. Initial Response Time** – the average time between assignment of the case to the support rep and the first case-related message, call or event.
- **Avg. Time to Assign** – the average time between case creation and assignment, excluding automatic assignments by rules and territories.
- **Avg. Time to Close** – the average time to close cases assigned to this rep based on the reporting period specified*.
- **Avg. Interactions** – the average number of messages, outgoing calls or events per case.
- **First Contact Resolution Rate** – the percentage of cases closed within the first message, call or event with customer.

> **Note:** To track the time spent on a case more accurately, you might want to take advantage of On Hold case statuses. The On Hold case status temporarily pauses the time tracking for support reps answering and resolving cases until the status is changed. For more information, see Creating Case Statuses.
>
> * For cases placed On Hold during the reporting period, note the following. The on hold times are not included as part of the calculation in the **Avg. Time to Close values**.

To see the Case Activity by Support Rep Summary report:

Go to Reports > Customer Service > Case Activity by Support Rep.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Case Activity by Support Rep Detail Report

The Case Activity by Support Rep Detail report provides the following details for each case with activity in the time period you set. It is sorted by the assigned support reps:

- **Date Created** – the date the case was originally submitted
- **Last Modified** – the most recent date the case was updated
- **Status** – the most recent status
- **Company** – the company reporting the case
- **Time To Assign** – the time between case creation and assignment to a support rep
- **Time to Close** –the time between case create and a status of Closed
- **Interactions** –the number of messages, calls or events associated with the case
- **Initial Response Time** – the time between case assignment and the first message, call or event
- **Resolved on First Contact** – displays Yes for cases closed with the first message, event or call

> **Note:** To track the time spent on a case more accurately, you might want to take advantage of On Hold case statuses. The On Hold case status temporarily pauses the time tracking for support reps answering and resolving cases until the status is changed. For more information, see Creating Case Statuses.

To see the Case Activity by Support Rep Detail report:

Go to Reports > Customer Service > Case Activity by Support Rep > Detail.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report

- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Open Issues Summary Report

The Open Issues Summary report shows you the number of open issues for each product for the time period you selected.

Click data in this report to view the detailed report.

To see the Open Issues Summary report:

Go to Reports > Issue Management > Open Issues.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Open Issues Detail Report

The Open Issues Detail report shows you all issues with a base status of Open for the time period you set. Issues are listed by the number and grouped by the employee assigned to them.

This report provides details for each open issue, including the product team, status, severity, priority, broken in version and target version. Click the issue number to view the issue record.

To see the Open Issues Detail report:

Go to Reports > Issue Management > Open Issues > Detail.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview

Closed Issues Summary Report

The Closed Issues Summary report shows you the number of issues by product that have been closed in the time period you selected.

Click data in this report to view the detailed report.

To see the Closed Issues Summary report:

Go to Reports > Issue Management > Closed Issues.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report

- Report Customization
- Reporting Overview

Closed Issues Detail Report

The Closed Issues Detail report shows you all issues with a base status of Closed for the time period you set. Issues are listed by the number and grouped by the employee they were last assigned to.

This report provides details for each closed issue, including the product team, status, severity, priority, broken in version and target version. Click the issue number to view the issue record.

To see the Closed Issues Detail report:

Go to Reports > Issue Management > Closed Issues > Detail.

A message appears indicating that your report is loading. The status bar in the footer of the report indicates the progress as your report loads. You can click **Cancel Report** next to the status bar to stop the report from loading.

> **Note:** This report does not support reporting by period even when the Report by Period preference is set to All Reports. The Report by Period preference can be configured at Home > Set Preferences, the Analytics subtab.

For information about working with reports, see the following topics:

- Navigating a Report
- Setting Report Footer Options
- Graphing a Report
- Printing a Report
- Emailing a Report
- Scheduling a Report
- Exporting a Report
- Report Customization
- Reporting Overview