ORACLE NETSUITE

Return Authorization from Case SuiteApp

2022.2

January 25, 2023

If this document is in private pre-General Availability status:

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your pre-General Availability trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described in this document may change and remains at the sole discretion of Oracle.

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

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

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

Return Authorization from Case

To get started with the Return Authorization from Case SuiteApp, see the following topics:

Return Authorization from Case Overview

The Return Authorization from Case SuiteApp lets you create a return authorization or a replacement sales order directly from a support case record for existing sales orders or customer invoices. The issues supported by the SuiteApp include, but are not limited to, the following:

- Wrong item shipped
- Wrong invoice price
- Wrong quantity
- Damaged goods
- Product replacement

With the Return Authorization from Case SuiteApp, you can:

- Search for existing sales orders or customer invoices using the transaction type, transaction date, or document number.
- Create a return authorization or a replacement sales order directly from a case record, with select data already populated.
- Maintain a one-to-one relationship between the support case and the source sales order or customer invoice transaction.
- Ensure that the source transaction, its support case, and the generated return authorization or replacement sales order records are all linked together. With the SuiteApp, you do not have to separately create transactions and related support cases. The SuiteApp also links these records automatically.

Review the guidelines and concepts in the following help topics before using the Return Authorization from Case SuiteApp:

- **Cases** – When a customer reports an issue, a question, or a suggestion to your business, you create a case in your account that is added to the cases list. This is the beginning of the case workflow.

For more information, see the help topic Working With Cases.

- **Invoices** – An invoice is a record of a sale to a customer. Invoicing is the process of creating bills for goods and services that customers receive. Record an invoice when payment is not received at the time of delivery. The invoice amount is the total due to be paid to you by the customer.

  For more information, see the help topic Invoices.

- **Sales Orders** – A sales order is a transaction that records a commitment to sell items or services to a customer. Sales orders have no accounting impact until items are shipped or services are completed.

  For more information, see the help topic Sales Orders.

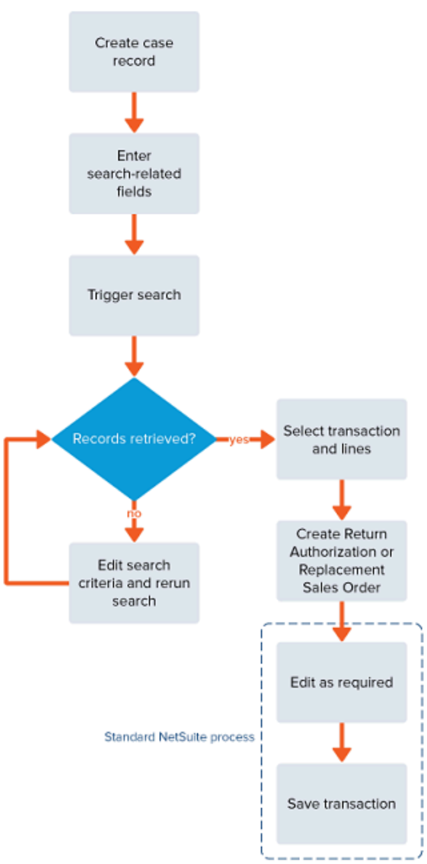
- **Return Authorization Forms** – A return authorization form, also known as a return materials authorization (RMA), is a record of expected customer returns.

  The return authorization holds information about the items you expect a customer to return, such as the item number and/or vendor item number and the quantity being returned. The authorization also tracks the price of items being returned which determines the amount to be credited or refunded to the customer.

  For more information, see the help topic Return Authorization (RMA) Forms.

Process Flow for Return Authorization from Case

The following diagram illustrates the Return Authorization from Case process flow:



To use the SuiteApp, you start by creating a support case record based on supported customer issues. Refer to Create Cases for the guidelines and procedures for creating case records.

When you have created the case record, open the record in **View** mode. Click the **Search Transaction** button to start using the SuiteApp. Using search filters, enter values to search for the transaction record to be used as basis for item return or replacement.

In the search results, select the transaction record and then select the item or items for return or replacement. Specify the quantity per item. Choose the corresponding button to create a return authorization or a replacement sales order.

You can generate a maximum of one return authorization and one replacement sales order per case record.

The return authorization or replacement sales order record generated is automatically linked to the case record. The new transaction record is set to Pending Approval and goes through standard NetSuite approval.

Refer to the following topics for guidelines and procedures on standard NetSuite approvals:

- Approving a Customer Return Authorization
- Approving Sales Orders

Return Authorization from Case SuiteApp is available in all languages supported by NetSuite. For more information, read the help topics Configuring Multiple Languages and Choosing a Language for Your NetSuite User Interface

Installing the Return Authorization from Case SuiteApp

- Availability
- Feature Requirements
- Installation
- Required Roles and Permissions

Availability

The Return Authorization from Case SuiteApp is a public and managed SuiteApp that is automatically updated whenever enhancements or new features are added.

Feature Requirements

Make sure that the following features are enabled before installing the Return Authorization from Case SuiteApp:

Subtab	Sublist	Feature Name
CRM	Basic Features	Customer Support and Service
Transactions	Basic Features	Sales Orders

Subtab	Sublist	Feature Name
		Return Authorizations

Important: Read the following feature compatibility:

- **Store Pickup** feature is not fully compatible with this SuiteApp. You can still create a return authorization if you enable the feature, but it will generate an error when you create a replacement sales order for invoices.
- Return Authorization from Case supports **Multiple Units of Measure** and **Multiple Currencies** features. If you use multiple units of measure, enable the feature by following the procedure in Multiple Units of Measure. If your business uses more than one currency, complete the procedure in Enabling the Multiple Currencies Feature

Installation

To install the Return Authorization from Case SuiteApp:

1. Using the Administrator role, go to Customization > SuiteBundler > Search & Install Bundles.
2. On the Search & Install Bundles page, use the following information to search for the SuiteApp:
   - Bundle Name: **Return Authorization from Case**
   - Bundle ID: **266623**
3. Click **Return Authorization from Case** to display its Bundle Details page.
   - To review the documentation for the SuiteApp, click the **Documentation** link.
   - The **Overview** subtab displays the abstract and description of the SuiteApp.
   - The **Components** subtab lists bundle objects, including their custom script IDs, referencing objects, and lock status.

   For more information, see the help topic Bundle Details.
4. Click **Install**.

   If asked, allow NetSuite to automatically upgrade the SuiteApp when new updates become available. During the installation, click **Refresh** to get the latest status.

Required Roles and Permissions

Using the Administrator role, customize the following standard roles with the corresponding minimum permission levels. When customized, only the following roles have access to the SuiteApp:

Standard Role	Transaction		
	Invoice	Sales Order	Return Authorization
Support Administrator	View	Create	Edit

Standard Role	Transaction		
	Invoice	Sales Order	Return Authorization
Support Manager	View	Create	Create
Support Person	View	Create	Create

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

Important: Only the user with the custom Support Administrator role can void, cancel, or delete transactions.

Setting Up the Return Authorization from Case SuiteApp

To setup the Return Authorization from Case SuiteApp, follow the instruction in setting the default date range for the Date Range filter.

Setting the Default Range for the Date Range Filter

You can set a default number of days to use when searching for transactions using the date range filter. You can enter a maximum of 365 days. If no value is entered, the range is automatically set to 90 days.

To set the default range for the date range filter:

1. Go to Home > Set Preferences.
2. Click the **Custom Preferences** sublist.
3. In the Return Authorization from Case field group, enter the default number of days that you want to use in the **Default Date Range** field.
4. Click **Save**.

Using the Return Authorization from Case SuiteApp

- Creating a Case Record
- Searching for a Transaction
- Creating a Return Authorization or a Replacement Sales Order
- Deleting, Voiding, or Canceling Records in Return Authorization from Case

Creating a Case Record

To create a case record, follow the guidelines and procedures in the help topic Create Cases.

Important: Using custom forms of other SuiteApps to create a case removes the Return Authorization from Case SuiteApp's custom fields, namely, **Return Authorization**, **Source Transaction**, and **Replacement Sales Order**.

Searching for a Transaction

To create a return authorization or a replacement sales order based on a customer invoice or sales order, you must first search for the transaction record with the item or items for return or replacement. You can use the following filters to search for transaction records:

- transaction type
- document number
- transaction date
- date range

Note: The date range filter is set to 90 days by default if you have not set your preferred value. For more information, see Setting the Default Range for the Date Range Filter.

The following table lists records included and excluded in the search results based on transaction status.

Transaction Type	Included	Excluded
Customer Invoice	Open Paid in Full	Pending Approval Rejected
Sales Order	Billed Partially Fulfilled Closed Pending Billing Pending Billing or Partially Fulfilled	Canceled Pending Approval Pending Fulfillment

To search for a transaction:

1. Go to Lists > Support > Cases.
2. Click the **View** link for the case record you created.

   Note: The **Search Transaction** button only appears in View mode.
3. Click **Search Transaction**.

   Search is not enabled if both a return authorization and a replacement sales order are already linked to the case record.
4. In the **Search Filters** group, define your search for records:
   - Using the date filter:

     Set the date range using the **From** and **To** fields. You can select start and end dates using the calendar icon. If you have defined a default number of days for the date range filter, the range is automatically set when you select a start or end date.

> **Note:** If for a particular case, you choose not to use the default number of days, you can manually edit the dates to set the date range you prefer.

- In the **Transaction Type** field:
  - Select **All** to search for both customer invoices and sales orders.
  - Select **Customer Invoice** to search for existing customer invoices.
  - Select **Sales Order** to search for existing sales orders.
- In the **Document Number** field, enter the exact document number of the customer invoice or sales order.

> **Note:** The **Type-Ahead On List Fields** preference does not support this field.

5. Click **Search**.

   The list of sales orders or customer invoices that fall within your set filters appears on the Search Transaction page. You can sort the search results by **Type**, **Date**, **Currency**, and **Amount**.
6. Proceed to Creating a Return Authorization or a Replacement Sales Order.

Creating a Return Authorization or a Replacement Sales Order

By this time, you have already created a case record and then performed a search of transaction records using filters on the case record. For more information, see Searching for a Transaction.

To create a return authorization or a replacement sales order:

1. On the Search Transaction page, click the **Select Transaction** link for the customer invoice or sales order record you want to link to the case record.

   The Create Transaction page appears, containing the list of items purchased in the sales order or customer invoice.

   > **Note:** Processing records that contain more than 500 line items may result to performance issues.
2. In the **Create Transaction** field, choose the transaction you want to generate.
   - **Return Authorization** – to generate a return authorization record from the transaction.
   - **Replacement Sales Order** – to generate a new sales order from the transaction.

   > **Note:** You cannot choose a transaction if one of the same type is already linked to the case record.
3. In the **Items** sublist:
   - Under **Select**, check the corresponding box for the items for return or replacement.

     You must select at least one item to create a return authorization or replacement sales order.
   - In the **Quantity** field, enter the number of items for return or replacement.

     If you are creating a return authorization, the value should not exceed the amount specified in the **Returnable Quantity** column.
4. Click **Submit**.

5. Verify the information about the Return Authorization or Sales Order page. Edit as required.
6. Click **Save**.

   The generated return authorization or sales order transaction now contains a link to the support case. The link to the created transaction record is also available on the case record.

Important: Take note of the following when you create a replacement sales order for a customer invoice:

- By default, only the values of standard item line column fields are automatically copied from an invoice to a generated sales order. See Field Values Copied from an Invoice to a Replacement Sales Order.
- You must enter the values manually in the item line column fields of a replacement sales order, which are not listed in the field values copied from an invoice to a replacement sales order.
- To update the price level of an item, you must remove the items then add them back on the item line before editing the value.

Field Values Copied from an Invoice to a Replacement Sales Order

The values from the following invoice and a sales order fields are copied when creating a replacement sales order:

Transaction Type	Field Name
Invoice	▪ Item ▪ Line ▪ Description ▪ Quantity ▪ Rate ▪ Amount ▪ Tax ▪ UOM ▪ Price Level
Sales Order	▪ Item ▪ Line ▪ Description ▪ Quantity ▪ Price Level ▪ Rate ▪ Amount ▪ Tax

Transaction Type	Field Name
	■ UOM ■ Price Level

Deleting, Voiding, or Canceling Records in Return Authorization from Case

When generated, a return authorization or replacement sales order is automatically linked to the case record and the original or source record. Take note of the following resulting scenarios when you delete, void, or cancel any one of the linked records.

Important: Only the user with the custom Support Administrator role can void, cancel, or delete transactions.

Support Case

When you delete the support case record, the link to it on the associated return authorization or replacement sales order is removed. The return authorization or replacement sales order record is not deleted.

Source Transaction

When you delete, void, or cancel the original customer invoice or sales order record, the link to that source record as well as the links to generated transaction records are removed from the case record. The associated return authorization or replacement sales order record is not deleted.

Return Authorization

- When you delete, void, or cancel a generated return authorization and the case record also has a replacement sales order, only the link to the return authorization is removed from the support case.
- When you delete, void, or cancel a generated return authorization and the case record does not have a replacement sales order associated with it, the links to the return authorization and the source transaction are removed from the support case.

Replacement Sales Order

- When you delete, void, or cancel a generated replacement sales order and the case record also has a return authorization, only the link to the replacement sales order is removed from the support case.
- When you delete, void, or cancel a generated replacement sales order and the case record does not have a return authorization associated with it, the links to the replacement sales order and the source transaction are removed from the support case.