Support Management

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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 have finished with 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 by the customer or support rep 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
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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.

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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 on 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 don't 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, if one of your support representatives handles all problems while 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 on online case forms, see Online Case Forms.

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

- Phone

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- 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, if one of your support representatives handles all email messages while 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.

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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 to 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, if you are awaiting reply from a customer or awaiting a solution from another department, you might want to use an on hold status to pause the case's time log. This enables you to 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 to automatically close 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.

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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 . 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 **Name** field, enter a name for this support issue.

   For example, you may want to offer support for those having trouble in your Web site, so you would enter Web site.
3. In the **Description** field, enter a brief description of what types of cases are classified in this issue.
4. Click **Save**.

To change your support issues, go to Setup > Support > Case Issues. 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, if one of your support representatives handles all questions about deliveries while 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 come in on the Creativo 2400, they are quickly assigned to Tom.

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

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- 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 now choose this item in the Item field on case records or online case forms when the case pertains to this item. 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 allow you to 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.

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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:** Because anyone can filter the cases list to see cases assigned to a support group, you can create support groups solely for the purpose of filtering the cases list by subject. Just 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.
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.
Messages Reopen Closed Cases	Check this box to allow a closed case to be reopened when a new message is entered or submitted. If you check this box and also choose to lock closed cases, the locked cases preference will not be overridden; cases will not be reopened with new messages.
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..

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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, you must select an email template in the Send Auto-Reply Email field 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 when new cases are created with an external case form in the Customer Center.
Inbound Email Case Capture	
Notify Customers	If you use the Email Case Capture feature, 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.
Assignment	

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Column & Preference	Description
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 if you want the customer to receive a copy of the Support Rep's reply, when they are assigned to a case, as it 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 if you want the customer to receive a copy of the Support Rep's reply, when the case is updated, as it 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 if you want the customer to receive a copy of the Support Rep's reply, when the case is escalated, as it appears on the case record.
Closure	
Notify Customer Upon Automatic Closure	Check this box to send a notification message to a customer when their case is closed automatically because all other cases linked to the case have been closed. This preference requires Automatically Close Linked Cases to be enabled, see 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 he or she is 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 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 new lead record when information on a case submitted through the external case form does not match any existing records.
Site Color Theme	Select the color theme you want to display in the Customer Center. You can create custom color themes at Setup > Site Builder > Color Themes

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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 the purpose of 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, and 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 now complete. To manage how cases are routed, you can go to Setup > Support > Case Management > Case Rules and Setup > Support > Case Management > Case Territories. To manage case territories, go to .

Marking Employees as Support Reps

Before an employee can be included 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**.

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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.

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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 if you want to restrict the use of this profile to cases for a specific subsidiary.

6. Select the **Anonymous Customer — Online Form** record you want to assign to cases that are entered through online case forms for people who do not match existing customer records.

7. Select the **Anonymous Customer — Inbound Email** record you want to assign to cases that are entered using Email Case Capture for people who do not match an existing customer record.

8. Click the **Notifications** subtab.

9. Select the **Customer Notification Templates** you want to use to notify customers when cases are created, updated, closed, or escalated.

10. Select the **Employee Notification Templates** you want to use to notify employees when cases are assigned, updated, 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

After you've defined your case types, case origins, support issues and support items, you can set up rules and territories to automatically assign cases to support reps or support groups.

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.

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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 to ensure that support reps are only assigned cases 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, alphanumerical 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 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 for the support issue Installation and one for the support items Creativo 2000, Creativo 2400, Impressivo 1000 and

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> Impressivo 1500. She 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 to ensure that support reps are only assigned cases 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 > New.
2. On the Case Territory page, enter a name for this territory.
3. Enter a description for this territory.
4. 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.
5. Click the **Configure Rule Definitions** subtab.
6. Select a rule you want to apply to this territory.
7. Click **Add/Edit**.
8. For each rule you want to apply, repeat steps 6 and 7.
9. Click the **Support Assignment** subtab.
10. 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.
11. Click **Add/Edit**.
12. 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.
13. 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 and set up territories in addition to it, any cases that are not assigned by the territories that you have set up are distributed using the round-robin territory.

You can change the priorities on the Manage Case Territories page by clicking the handlebars next to the territory you want to move up or down and dragging it to the position you choose. To view the rules for a territory or make changes to a territory, click the name of the territory in the Case Territory column.

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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.

Lina's Dance Studio Support Case

Case Issue: Installation

Origin: Online

↓

Territory 1: Sound Quality/Online Cases

Rule 1: Case issue must = sound quality
Rule 2: Case origin must = online

Support Rep: Inger H Wyman

Case not assigned Both rules not met ✖

Filtered to Territory 2

Territory 2: Installation

Rule 1: Case issue must = installation

Support Rep: Tom Taylor

Case assigned ✔

Case not filtered through remaining territories with lower priority

Territory 3: Online Cases

Rule 1: Case issue must = online

Support Rep: Brad Sparling

Territory 4: Default Round Robin

All cases not assigned ny other territories are dealt out evenly to support reps in alphabetical order.

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.

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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 that need to be reassigned 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, and 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.

Setting Case Escalation Rules and Assignments

You can set up escalation rules and assignments to ensure that high priority cases are routed to the correct person in your company at the right time.

Setting Up Case Escalation Rules

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.

To create a case escalation rule:

1. Go to Setup > Support > Escalation Rules > New..

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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 also base escalation on the amount of time since the case was created, the amount of time since it was last modified by the customer, or the amount of time 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 may have a group of customers who have purchased a warranty plan where 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 and a rule for duration since case creation of greater than equal to 12 hours.

You then create a case escalation assignment that includes both of these rules and assign it to a support team devoted to resolving high priority cases.

> **ⓘ Note:** If you do not want all existing cases escalated based on the rules you select when you set up assignments, you must also create rules to include only open cases and cases created after today.

Setting Up 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 Setting Up Case Escalation Rules.

> Wolfe Electronics creates a case escalation assignment that includes both a rule for customer who have purchased a warranty and 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.

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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:** If you do not want all existing cases escalated based on the rules you select, you must also create and select 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, and click Add.

8. Continue adding individuals or groups if needed, and click **Add** after each.

   Cases are distributed evenly to all the individuals and groups listed.

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

Case profiles, Setup > Support > Case Profiles, allow you to create additional support addresses and route support issues to a particular product area, team or, in the case of OneWorld users, subsidiaries. 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 on 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

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Case capture works by forwarding your company's support email address to a NetSuite-generated address. You will need to make a note of this when setting 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**.

> (i) **Note:** When setting up a new case profile, the **NetSuite Inbound Email Address** will be generated after you click **Save**. From the profile list, click **View** to see it.

Prerequisites for Setting Up Email Case Capture

Your company mail server administrator must set up the following things 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 and displayed 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 in your account, a copy of the case record is also saved to the company record. If there is no matching company record, the case will

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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 also choose to have the support rep automatically notified when he or she is assigned to that case. Go to Setup > Support > Support Preferences > Notification, in the Assignment column, check the Notify Assignees box.

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

Troubleshooting Email Case Capture

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

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

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

If test cases are being created in your NetSuite account from spam email messages, ask your IT department or mail sever administrator to set up a filter on the Exchange server to exclude any messages that include more than three addresses in the **To** field.

> **⚠ Important:** You cannot send emails generated from within NetSuite to the inbound case capture address. This includes emails created from within the communication subtab of a record, as well as scripts, including workflows. This is due to system security precautions.

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 there is an existing company record matching 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 selected, that contact is selected in this field.
Email	The email address the message was originally sent from.
Message	Text of the message in the 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 is automatically saved to the contact record and 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's 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 make it easy for customers to contact you with any enquiries, and your service team to resolve problems and offer customers the best service possible.

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

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's default format for an online form, or 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.

Selecting Fields

1. 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.

2. In the **Label** column, you can edit the name of the field as it appears on the form.

3. In the **Section** column, select the subtab you want this field to appear on. See Customization > Forms > Subtabs

4. In the **Help** column, enter any text you would like to appear below the field to assist your customers when completing the form.

5. In the **Width** column, enter the width for the field.

6. To make a field a required field, check the box in the **Mandatory** column.

7. Check the **Search** box if you do not have duplicate detection enabled in the **Set Up Workflow** subtab, and you want NetSuite to index that field against existing records and suggest matches.

   If the information matches another record, the new information will be 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 on the **Set Up Workflow** subtab.

   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.

8. 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.

9. Check the box in the **Select** column if you want your customer to choose from a dropdown or popup list in this field.

10. Click **Add**.

11. Repeat these steps for each field on the form.

12. Use the **Move Up**, **Move Down**, **Move to Top** and **Move to Bottom** buttons to change the order fields appear on your form.

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

Determining Workflow

1. Click the **Set Up Workflow** subtab.

2. Click the **Create Customers as Companies** box if you want new contacts, without a match to an existing record, to be created as a company rather than as an individual.

3. Select the profile from the **Default Case Profile** field which you want to assign to cases created through this online case form. You can also set the profile on case forms by adding the profile as a parameter to the form URL or allow those submitting the form to set the profile manually.

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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

4. 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..

5. 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.

6. in the **Handle Duplicate Records** field, select an action to take if a duplicate record is detected.

7. Check the **Use Duplicate Detection Criteria** box if you want to use the standard criteria set in the company setup page.

8. 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.

9. Add a subject for the auto-generated message in the **Subject** field

10. 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

11. In the **Email Address of Recipients** field, enter the email addresses of people who should be notified when a customer completes and submits the online case form. Enter the full email address separated by commas or semicolons.

> ⓘ **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.

Setting Up the Form's Appearance

1. Click the **Set Up Appearance** subtab.
2. Choose how many columns you want the form to be displayed in.
3. Select a color theme for the form.
4. Select a font for the form.
5. Check the **Unlayered Sections** box, if you want your form to appear without tabbed sections.
6. Choose where to place the buttons on the form from the **Button Alignment** field.
7. 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

Custom Code

If you intend to use SuiteScript features, click on the Custom Code subtab to:

- Choose a JavaScript file that contains your desired scripts in the Script File field.

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- 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 field on the form is accepted.

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 have completed 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, or use the URL in the Internal Form URL when linking to a form from a NetSuite website, intranet site or from the Partner or Vendor centers.

You can also customize the URL of your linked form so that certain information can automatically be sent to NetSuite after the form has been 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, see Setup > Support > Case Types, they include the parameter &origin=Cameras to track the case origin from their camera business. 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@email.com

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Field	Tag and Example
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 or pictures, that can 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 in a subfolder named for the customer record who filed the case.

If the file the user tries to upload is too large or is not a supported type, the case is still saved, but the file is not uploaded.

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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 the layout and design of your 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.

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

Creating Online HTML Form Templates

When creating an online form template, you determine how the fields are arranged, 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

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> ⚠️ **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.

Images and Online Forms

To include images in your online HTML forms, you can include images you've uploaded into 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.netledger.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 on 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.

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, you will first need to convert it into an online form template before it appears in the template list. To create the online template, select **New** from the dropdown list. Name the template, and locate your HTML file from the Marketing Templates folder in File Cabinet. For more information on online form templates see, Online Form Templates

5. Ensure that the selected fields match those of your custom HTML template.

6. Click **Save**.

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

Your online case form is now complete. Your support team can now 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 > CRM. 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 designates the case as internal and allows help desk employees to search for or assign rules and territories based on cases with this box checked. For more information, see Creating Case Rules.

  Cases designated as Help Desk are not included in case reports.

- Help desk cases are added to the Employee Center.

  Employees who do not normally have access to case records can log in to the Employee Center and 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.

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- This is the form used by employees entering help desk cases in the Employee Center.
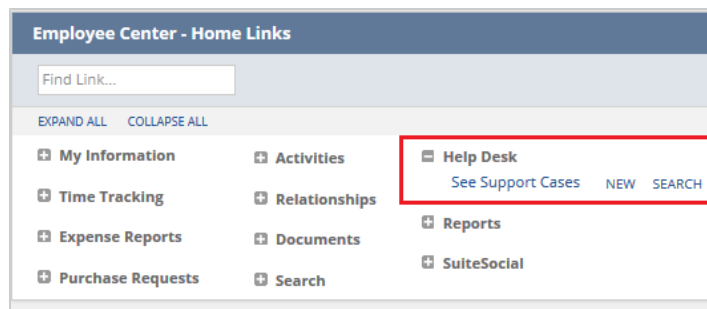
Case Form Customization

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 choose to add fields to capture extra information or remove or hide fields that your company doesn't 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've 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've 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

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- 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 Ron Wolfe changes the font and text size of the standard notification sent to customers when a new case is created. He 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.

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

If you do not prepare your template file outside of NetSuite beforehand, you can compose the message in the Template field on the email template record.

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 so that only you can use it, or you can select a group to have exclusive access to the template.

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6. Click **Save**.

Your notification template is now 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, if you want to restrict support reps' access to support cases based on their subsidiary, check the **Restrict Cases Based on Subsidiary** box.
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, you can enter the company name and the From email address you want to show 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. Like other preferences, as long as the subsidiary preferences match the company preferences, when you change the company preference, the subsidiary preference is updated as well.

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.

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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 is saved through the Customer Center or through the My Account page of your Web site, the customer's subsidiary is shown 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 or by choosing a default subsidiary on the Set Up Workflow subtab of the online case form.

As long as 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.

  If you set the Handle Duplicate Records preference to create a new customer record when no match is found, the record is created and associated with the subsidiary set on the form. If no subsidiary is set on the form, and no default subsidiary is set, the new customer record is associated with your top-level parent subsidiary.

  If 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. When using case profiles, the value entered in the subsidiary filter of the case profile form 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.

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Customizing Support Rep Roles for NetSuite OneWorld

If you want support reps to only be able to see cases in their subsidiaries, go to Setup > Support > Preferences > Support Preferences, and 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 rep's employee record.

Creating Case Rules and Territories Based on Subsidiary

After you have customized 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 by basing 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 more 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. After you have set up a case profile for each subsidiary, use the **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@acme.com" to something like "cases.375xxx.248xx@cases.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. Prerequisites for Setting Up Email Case Capture.

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Working With Cases

When a customer reports an issue, a question, or an 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.

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 either reply to the message or click a link in the text of the message to provide more information or follow up with more questions. This message is added to the original case record, and if you choose, it can be emailed 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 and 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 designed for support reps with the Support Person role. However, administrators, support administrators and support managers can also complete the tasks described in this chapter.

The Cases List

When a support rep enters a case for a customer calling in or a customer submits a case with an online case form, the new case is added to the cases list. The cases list displays all open cases by default and 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 will 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** tab, you 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. Because NetSuite automates the communication and organization of cases, you only need to step in to respond to the customer's issue and send the case back into the process.
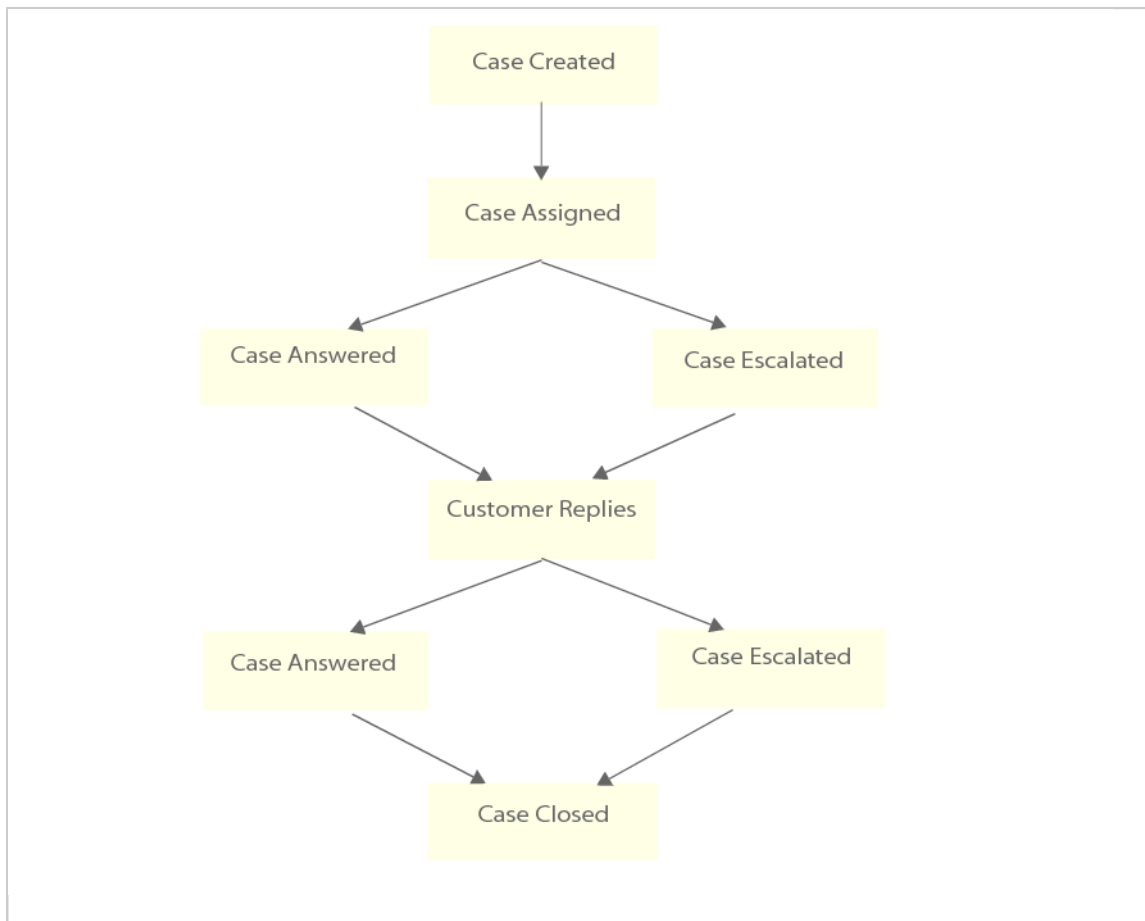
When a case is created from an online case form, email or external case record, it can be assigned in the following ways:

- 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 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 case is created by a support rep when a customer calls in, the support rep can document the customer question or concern and the answer given to the customer. The case can then be closed by the end of the phone call and it is accurately and quickly documented.

Creating 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.

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.

To enter a customer support 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.

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For more information, see Creating Case Profiles.

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

   If you want 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.

> (i) **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.

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> **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.

Communication

1. On the **Communication** subtab, 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:** After a case is saved, you can copy or blind copy others on messages or send attachments using the **Email** button on the Messages subtab.

2. 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.

3. 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**.

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

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

5. 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.

6. Check the **Internal Only** box if the reply should not be sent to the customer but should be sent to the employees selected in the **Copy Employees** field.

7. 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

8. 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.

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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 choose to view either cases awaiting support reply, cases awaiting customer reply or all cases in the Response Status filter at the bottom of the cases list.

If the customer reports the issue, question or other feedback online with an online case form or email to your support address, a case record is automatically created with the information the customer submits and set to Awaiting Support Reply.

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 will remain assigned to the original support rep unless you select another support rep in the Assigned To field.

4. If you want to email changes you have made 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 on the name of the case to view the details of the case record or click Edit to add a message from a customer or a response from a support rep.

Linking a Support Case to a Transaction

It is possible to link support cases to transactions. Seven types of transactions are supported, including sales orders, invoices and purchase orders. For example, your company can create an invoice for a repair service performed for a customer and associate it with the support case that originated the service request.

To link a support case to a transaction:

1. Open the support case record.

2. Click the **Related Records** subtab.

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3. Click **New** under **Transactions** to create a new linked transaction or 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.

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To grab a case:

1. Go to Lists> Support > Cases > Customer Service > Cases..

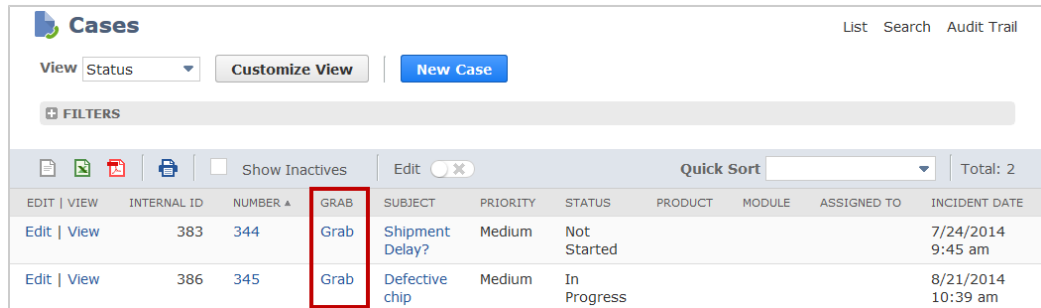2. Click **Grab** next to the case you want to assign to yourself.

    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 as closed, the case no longer appears on the case list unless you set the status filter on the list to show closed cases.

4. Click **Save**.

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

If the administrator allows support reps to receive email when a customer responds to a case, you can receive any additional questions or information from customers by email. These messages are also added to the case record. For more information, see Receiving Customer Responses to Cases.

Administrators can allow you to receive customer responses by clearing the Receive Customer Replies in Case List Only box at Setup > Support > Preferences > Support Preferences.

From the Cases list, you can click on the name of the case to view the details of the case record or 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 private information in an email to the group or person whom the case is being escalated to. The escalation message is not logged in the case record, and the customer does not receive the message.

For example, Tom Taylor, a Wolfe Electronics support rep, has been assigned a case about an invoice submitted by a customer online. Because Taylor is not an expert on this case issue, he escalates the case to Carmen Matthews in the sales department with a message on how Matthews 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, you can create a group using your email client and supply that group email address on the group record.

To escalate a case:

1. Go to Cases > Customer Service > 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 not recorded in the case record.
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 now has the status Escalated. An email message is sent to the person you've escalated the case to.

Escalating a case does not raise its priority or change who the case is assigned to. It sends the email message to let the person know you need assistance on the case and 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 click De-Escalate. 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 are automatically escalated based on certain conditions you set. For more information, see Setting Up Case Escalation Rules.

Locked Cases

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

Cases that have been locked do not have Edit or Grab links in the Cases list and cannot be updated from the Customer Center or using the Email Case Capture feature unless you choose to allow new messages to reopen closed cases.

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.

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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, when a support rep receives a call from a customer, the rep may 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 to bill that customer for the time the support rep spent resolving the case.

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

> ⚠️ **Important:** The ability to track time in NetSuite is also required for Time Tracking for CRM.

> ℹ️ **Note:** If you also use the Projects feature and you want to track time for customers, you must disable the Show Projects Only for Time and Expense Entry preference located at Setup > Accounting > Accounting Preferences > Time & Expenses. When this preference is enabled, time can only be tracked 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.

   > ℹ️ **Note:** If any case, task, or event record has more than 9500 time entries to display on the Time Tracking subtab, all cases 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**.

All employee names are listed on the Time subtab by default.

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

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Responding to Customer Cases

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

If you are taking the support case on the phone, you can take notes in the **Reply** field to document the advice you gave the customer, set the status to **Closed**, and save the case. If you wish to email the customer information from the case, enter it in the **Reply** field of the case record, and 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. If you wish to send an email using the email address of the person replying to the case (i.e. Support Rep), click **Email** in the **Messages** subtab and select the required address from the **Message** subtab.

If the case was created when the customer filled out an online case form or external case record, you can answer the case by entering a message in the Reply field. Check the Send to Customer box, and your response is emailed to the customer 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 have the Knowledge Base feature enabled and want to attach a solution to this case, 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 have Time Tracking for CRM enabled, see 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 is shown at the top of the message. Any prior information is shown at the end of the message in the Message History.

> **ⓘ Note:** If the employee who is creating or updating the case record is selected in the Company field, the notification email does not show new information entered in 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 tab. The Notes tab 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.

Forwarding and Replying to Existing Case Messages

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

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Clicking View for a message will open it in a new form where you have the option to manage recipients, read receipts and attachments. On the Message tab you can read the existing message. At the top of the form, you can choose to reply, reply to all, and forward a message.

You can reply to a message on a case record. When replying to a message, your reply will be recorded in the message history on the case record.

In the Recipients tab it is possible to add recipients on carbon copy. In the Message tab write the desired text of your reply. You can also add attachments. After you have completed the text of your message click Merge & Send.

It is possible to add blind carbon copy recipients to email sent from a support case record by entering an email in the **Email** column, checking the box in the **BCC** column and clicking **Add**. Reply email from **BCC** recipients are marked as Internal Only.

It is possible to 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 will not be saved in NetSuite and it will not be recorded in the case record. Forwarded messages will not have any address in the reply-to field, in order to avoid any reply to be saved by the system.

Selecting the From Address for Email Sent From Support Cases

If you need to send email from a support case to someone besides the customer the case was entered for, click the **Communications** subtab, and on the **Messages** subtab, click **Email**.

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When clicking the **Email** button or replying to an existing message on a support case, an **Email Message** window opens.

In the **Email Message** window, on the **Message** subtab, you can choose for Sender Address either the email address on the case profile with which you are attending this support case or your login email address.

Receiving Customer Responses to Cases

Customers first submit cases online or by calling your customer service team. If a customer service rep decides to answer the customer by sending an email message to the customer, the customer may reply with more information or further questions.

In such cases, customers have three main ways of getting in touch with your customer service team:

- Calling your customer service team with the case number.

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

- If the Capture Email Replies feature is enabled, by replying to either the automatic email or the support rep's response email.

  This reply is added to the case record.

- By logging in to the Customer Center, going to the Cases list and adding a message to the actual case record.

You can manage how customer support reps are notified of cases and changes to an individual case from the 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 that you can open from the Messages subtab on the case record.

If you set the Messages Reopen Closed Cases preference, when the customer edits the case or replies to a case email message, the original case status is changed from Closed to Re-Opened and has a response status of Awaiting Support Reply.

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

> **(i) Note:** When the customer saves this form, they are taken to the Web site entered at Setup > Company Information in the Web site field.

If the customer replies with further questions or clarification, changing the status to Re-Opened, you can:

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

Applying Spam Lock to Incoming Email Messages Using the Case Reply To Address
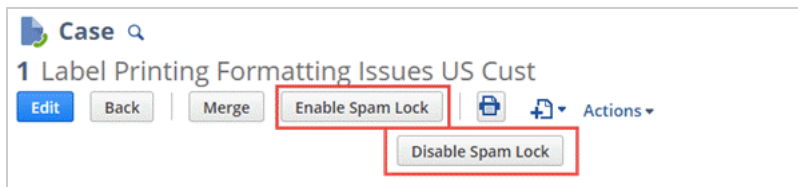
When Spam Lock is enabled on an individual case form, incoming messages to the support case will only be accepted if they are sent using an email address from one of the following valid types in NetSuite:

- 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 will be discarded. The preference is applied to individual cases. Any user who can edit case records, can click the **Enable Spam Lock** button on an existing case record to enable this preference. Spam Lock is turned off by default.

> **⚠ Important:** If an email is not sent from one of the valid types above, the case will not be updated. Be aware that SuiteScripts dependent on case updates will also not function under these circumstances.

Closing Cases

When you have replied to the customer with a definitive answer, you can change the case status to Closed.

Closed cases are still saved in your cases list, but the cases list filters out closed cases by default. This way, you can still view closed cases, but they do not show with the open cases you are currently working with.

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If the customer replies to the email message sent from the case, the case will be re-opened and 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 will be created, and the case workflow begins again.

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

Merging Support 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.

Your user role must have both the View Cases and Full Duplicate Case Management permissions to merge support cases.

To perform the mass 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. On the **merge** tab, you can 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 click **Merge** or **Cancel** to stop the merging process.

> **Note:** If the duplicate cases do not contain any data that you want to keep, consider Deleting Support Cases them.

Deleting Support 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 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.

Mass Updates
ACTION
⊞ Group Records
⊟ Customer Support and Service
Change Case Status
Change Support Rep Assignment
Reassign Cases by Case Territory Rules
Change Case Priority
Escalate Cases
Change Customer Role
Inactivate Cases
Delete Cases
⊞ Transactions
⊞ Opportunities

> **Note:** If you want to keep data from duplicate cases, consider merging them with the original case record. For more information, see Merging Support Cases.

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Issue Management

Introduction

When you enable the Issue Management feature, you can set up your NetSuite account to document and manage issues that occur with the products you manufacture and sell. Customer support reps and quality assurance employees primarily enter issues, but 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 creating 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—Engineering Manager, Engineer, QA Manager, QA Engineer, Issue Administrator, Product Manager and PM Manager.

- **New group types –** When you create a new employee group, you can 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.

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- **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 to 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 that 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 at Home > Set Preferences > General in 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	Issue Severities
3	Issue Priorities
4	Issue Types
5	Issue Sources
6	Issue Reproducibility
7	Products and Modules
8	Issue Roles
9	Customizing Issue Notification Email
10	Employee Groups for Issues
11	Issue Tags
12	Issue Statuses
13	Issue External Statuses
14	Managing 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.

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Setting up this feature requires the Issue Administrator role to customize the selections that can be made on issue records and 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 > CRM.

2. > ℹ **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:

    - Issue Severities
    - Issue Priorities
    - Issue Types
    - Issue Sources
    - 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 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 Issue Roles.

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.

    > ℹ **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:

9. - **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 and 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 Employee Groups for Issues.

10. Customize the email notification your employees and customers receive when issues are created or updated. For more information, see Customizing Issue Notification Email.

11. Create issue tags to set constant keywords for issues at Setup > Support > Issues > Issue Tags. For more information, see Issue Tags.

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12. Create and edit issue statuses at . For more information, see Issue Statuses.

13. Create and edit external issue statuses at . Customers can see these statuses in the Customer Center when you allow access. For more information, see Issue External Statuses.

14. Go to Issues > Setup > Manage Status Transitions. For more information, see Managing 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 > Settings > Set Preferences > General using 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, such as allowing multiple versions and builds to be selected on issues and automatically closing 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.

General

1. Check the **Use Last Assignee** box to assign an issue to automatically assign an issue to the employee who was last assigned to 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.

2. Check the **Use Multiple Versions and Builds** box 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.

3. Check the **Automatically Close Linked Cases** box to automatically set a case's status to **Closed** when all attached issues are set to a base status of **Closed**.

   You can choose to have email notification sent to customers when cases are closed automatically when associated issues are closed. To do this, go to Setup > Support > Preferences > Support Preferences > Notification, and check the **Notify Customer Upon Automatic Closure** box.

   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, someone with the Administrator role can edit the case status at Setup > Support > Setup Tasks > Case Statuses, and check the **Auto Close With Issues** box.

Notifications

1. 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, if 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.

2. Check the **Allow Customer Override** box if you want customers to be able to change their issue notification email settings in the Customer Center.

3. In the **Customer Template** field, select the template you want to use to notify customers of changes to an issue.

4. 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 more information, read Customizing Issue Notification Email.

5. Click **Save**.

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 dropdown 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 Issue External Statuses.

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 Issue Roles.

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.

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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 using 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 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 click Done.

Issue External Statuses

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 external statuses using 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 external status, click the name of the status to select the line, edit the text and selections for that status, and click **Done**.

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

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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 entirely customizable, but 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 click **Remove**.

To rearrange issue severities to change how they appear in the Severity field on issue records, click the name of a severity, and click **Move Up, Move Down** or **Move To Top** to change its position.

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 click Done. To delete a priority, click the name, and 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 click Done. You would then do the same to replace P2 and P3 with Middle and Low.

To rearrange issue priorities to change how they appear in the Priority field on issue records, click the name of a priority, and click Move Up, Move Down or Move To Top to change its position.

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 intend to use a default issue type, it is best to 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 click **Done**. To delete a type, click the name, and click **Remove**.

To rearrange issue types to change how they appear in the Type field on issue records, click the name of a type, and click **Move Up, Move Down** or **Move To Top** to change its position.

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 and 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**.

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

To rearrange issue sources to change how they appear in the **Source** field on issue records, click the name of a source, and click **Move Up, Move Down** or **Move To Top** to change its position.

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 matter or 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 click Done. To delete a reproducibility type, click the name, and click Remove.

To rearrange issue reproducibility types to change how they appear in the Reproduced field on issue records, click the name of a reproducibility type, and click **Move Up, Move Down** or **Move To Top** to change its position.

Issue Tags

Issue tags allow you to 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. When a support rep receives a case on poor CD quality with skipping, he enters an issue record and selects CD skipping and audio clarity as tags. Later, when another employee needs to search issues for audio problems, she 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 Set 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.

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3. In the **Product Team** field, select the team associated with this tag.

   If you select a product team, the team automatically fills in the **Product Team** field on issue records when this tag is selected and a 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.

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 could 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**.

Product Versioning

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, in the **Expected Release Date** field, enter a date when this version of the product is expected to be available to customers.
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.

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10. Check the **Allow Fixed In** box to allow this version to be selected in the Fixed In field on issue records.

> **ℹ Note:** Administrators still see all versions in the corresponding dropdown lists on issue records. Others only see versions listed in the dropdown lists they are marked to appear in.

11. Check the **E-fix** box if this version is a patch or emergency release.

12. If you want this product version to show in the Product Versions portlet on the **Issues** tab in the Support Center, check the **Show** in Portlet box, and enter a description of this version that you want to appear in the portlet.

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 allow the build to be selected in the each of the respective 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 with 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.

> **ℹ Note:** Those using the Issue Administrator role cannot select products on items. You may need to have someone using the account Administrator role or another role to 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**.

Issue Roles

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, such as whether they can mark issues as Fixed or be selected in the Reviewer field. When you create a new issue role type, you must associate the issue role with a user role at Setup > User/Roles > User Management > Manage Roles.

Someone using the Administrator role can complete this step.

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, or you can assign an issue role type to the employee's user role at Setup > Users/ Roles > User Management > Manage Roles.

Figure 1. 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 Engineering Manager	Issue Reports Edit/Create Issue Records Mark Issues as Showstoppers
Quality Assurance	QA Engineer QA Manager	Issue Reports Edit Issue Records Mark Issues as Showstoppers
Product Management	Product Manager	Issue Reports Edit/Create Issue Records

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Issue Role Type (assigned on role)	User Role (assigned on employee record)	Issue Permissions of User Roles
	PM Manager	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 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 only allow employees with this role type to assign issues to other employees with this role type.

   To assign an issue to another role type, 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.

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- **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 on the Versions subtab of product records at Issues > Setup > Products.

9. Click **Save**.

Managing 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 may decide that this cannot be changed back 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.

Figure 2. 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, be careful to only make changes that ensure open issues can continue the resolution process. For example, if an issue is assigned to a QA Engineer in the status of Fixed, you want to make sure that 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 Issue Types.
2. To set up issue roles, see Issue Roles.

3. To set up issue statuses, see 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.

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 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 and then create additional function team groups for other teams you want to email.

- **Issue Role/ Issue Queue groups** – When you select a role that corresponds to the role of this group's members, this group can be assigned 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.

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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 allow this group to be emailed from the **Communication** subtab of issue records using the address from the Email field on this group record.

   If this group is a product team or issue queue, you can check this box to be able to email 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 using an issue role type with the **Restrict Assignees** box checked can assign issues to issue queues when they need to assign an issue 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. If you are uploading an html file to use as the template, select **File** and select **New** to upload the file to your NetSuite file cabinet.
5. If you are creating 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 and choose the field you'd like to include from the **Insert Field** dropdown.
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 .

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, and 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 email an issue:

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

2. Check the **I Own This Issue** box to be automatically assigned to this issue any time the issue is sent back to the status for your issue role.

   For example, an engineer who owns an issue enters a fix for the issue, sets the status to Fixed and assigns the issue to the QA issue queue. When a QA engineer tests the issue, he still experiences the issue and 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.

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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**.

To 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.

For example, a case with Wolfe Electronics titled **Can't Access Download** 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 while 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. While the case is in this status, the issue is resolved and closed. When 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. As soon as the case status changes to Pending Issue Resolution, it is automatically changed to Closed-Issue Resolved because the only linked issue had already been 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 (this type of notification is only sent 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.

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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, in particular reducing the number of customer service cases, customers can access the knowledge base from the Customer Center and quickly 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, if 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.

This chapter is meant primarily for those with the Support Administrator or Support Manager roles. Each of these roles can create and publish knowledge bases. The following roles may also be able to use the Knowledge Base feature:

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

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To turn on the Knowledge Base feature:

1. Go to Setup > Company > Enable Features > CRM > Support.

2. Check the **Knowledge Base** box.

   You must have the **Customer Relationship Management** feature enabled before you can turn on **Knowledge Base**.

3. Click **Save**.

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

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, and 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 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.

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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 or attach solutions to support cases to allow a quick response to customer issues.

For more 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 solutions can be created.

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.

   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:** To only allow **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**.
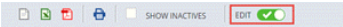
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- Click **List** to select a related solution from the solution list.

- 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

> **(i) 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 have created your solutions and attached them to topics and cases, you can publish your knowledge base by going 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.

> **(i) 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.

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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 then 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 they are published to is assigned an audience.

You can search for solutions only in the context of the knowledge base. For example, if you published the knowledge base to a certain tab on your site, you must click on 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.

> **Note:** When you publish a knowledge base to a Web site or intranet or make a change to a published knowledge base, the update process takes one hour to complete. This means you must wait to see your changes online.

Add a Knowledge Base as a Center Tab

A knowledge base can also be included in the menu as a custom tab. Individual knowledge bases can be visible on a role by role basis, a HR knowledge base visible only to users with a HR role, or a support knowledge base visible only to technical support staff.

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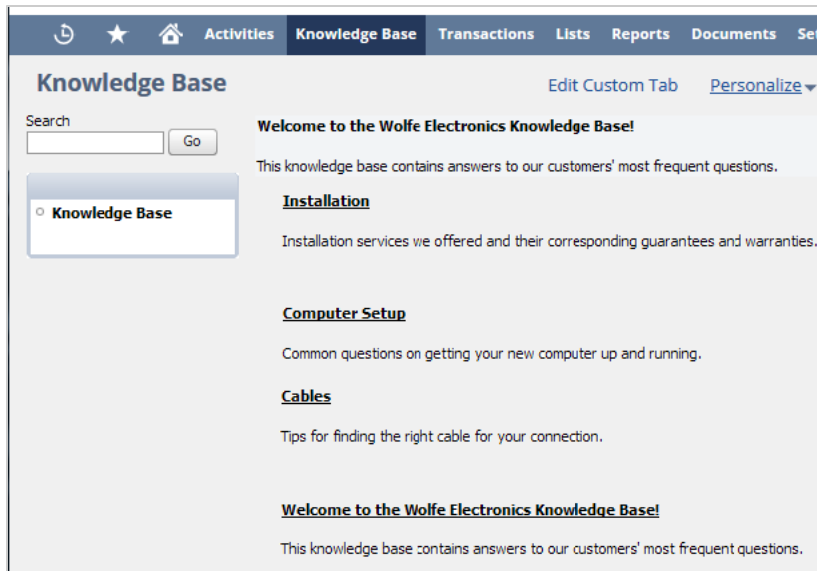
For information on how to set up Custom Center Tabs, see the help topic Creating Center Tabs

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.

Note that if you select any of the basic site theme templates in the **Topic/Category List Layout** field, or in the **Solution/Item List Layout** field, the HTML template is ignored. Only the following properties for rows and columns specified in the layout are applied to the page:

- Border Style
- Column Width
- Number of Columns

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- 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**.

Now, 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 to: 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, ensure the solution **Description** field is included on the form design.

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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

> ⚠️ **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.

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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 Filet 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**.

Once the case saved search has been created, or if you want to use a previously prepared search, you can proceed to the Case Alerts page to complete the set up.

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 is provided with a default email template which is fully customizable. This can be found at Setup > Company > System Email Templates

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The subject header is derived from the case name used in the name field on the case alert record, and the number of cases that match the search criteria.

Clicking View opens the case record in NetSuite. Clicking Detail jumps you to 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, aimed at providing support managers with greater visibility on how effectively a case is being handled. These metrics are accessible by clicking on the Metrics subtab of a case record.

Communication	Related Records	Escalations	**Metrics**	Time Tracking	System Information	Sales Associate

Duration

TIME ELAPSED		TIME ON HOLD
3 days 17 hrs		9 hrs
TIME OPEN		TIME TO CLOSE
3 days 8 hrs		
TIME TO ASSIGN		INITIAL RESPONSE TIME
2.5 hrs		4.5 hrs

Basic Information

DATE CREATED		DATE CLOSED
FIRST UPDATED		LAST MODIFIED DATE
DATE LAST REOPENED		

Interactions

SUPPORT FIRST REPLY		LAST CUSTOMER MESSAGE RECEIVED
LAST MESSAGE DATE		

Issue Management

FIRST ISSUE ATTACHED		LAST ISSUE ATTACHED
FIRST ISSUE REMOVED		LAST ISSUE REMOVED

Support managers are able to aggregate these metrics across all cases using 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 table below 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 (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 time between when the case was created and the first reply was sent to customer (excludes automated notifications).
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).

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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 of 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 intended to be used by support managers to build support performance criteria and to assist with SLA monitoring. In the following example, we'll create a saved search to monitor any breaches of an SLA which requires all cases to be responded to within four hours of the initial creation time.

To create a support metric saved search

1. Ensure the Customer Support and Service feature is enabled. Go to 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

- ◻ 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

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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 and the average amount of time each support rep takes to close a case.

This report is organized by support reps and their respective managers and 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. When you use a case status marked as On Hold, the time tracking for support reps answering and resolving cases is temporarily paused until the status is changed again. 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.

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 and is useful for getting specific 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. When you use a case status marked as On Hold, the time tracking for support reps answering and resolving cases is temporarily paused until the status is changed again. For more information, see Creating Case Statuses.

To see the Open Case Analysis Detail report:

Go to Reports > Customer Service > Closed Case Analysis > Detail.

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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.

Open Case Analysis Summary Report

The Open Case Analysis Summary report lists the total number of open support cases and the average time spent on a case by each support rep.

This report is useful for getting a overall 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. When you use a case status marked as On Hold, the time tracking for support reps answering and resolving cases is temporarily paused until the status is changed again. 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.

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 is useful for getting a specific update 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. When you use a case status marked as On Hold, the time tracking for support reps answering and resolving cases is temporarily paused until the status is changed again. 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.

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> **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.

Closed Case Escalation Summary Report

The Closed Case Escalation Summary report shows you the number of closed cases that were escalated during the date range you select in the footer of the report. 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.

Closed Case Escalation Detail Report

The Closed Case Escalation Detail report shows you the details from each closed case that was escalated in the date range you select in the footer of the report.

This report includes the case number, the person it was escalated to, the date the case was created, when it was escalated, and the amount of time between the time it was escalated and the time it was closed. You can 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.

Open Case Escalation Summary Report

The Open Case Escalation Summary report shows you the number of open cases that have been escalated and the respective date ranges they were escalated.

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You can click the number of cases to view a list of the cases for that date range, or you can 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.

Open Case Escalation Detail Report

The Open Case Escalation Detail report presents details from each escalated case including case number, who it was escalated to, the date the case was created and the date and time it was escalated. You can 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.

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.

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> **ⓘ** **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.

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.

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.

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.

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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.

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 may want to use the **On Hold** case statuses feature. When you use a case status marked On Hold, time tracking for support reps answering and resolving cases is temporarily paused until the status is changed again.
>
> * If any cases were placed On Hold during the reporting period, the on hold times will not be included as part of the calculation in the **Avg. Time to Close values**.
>
> For more information, see Creating Case Statuses.

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.

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> ⓘ **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.

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, 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 may want to use the **On Hold** case statuses feature. When you use a case status marked **On Hold**, time tracking for support reps answering and resolving cases is temporarily paused until the status is changed again. 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.

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