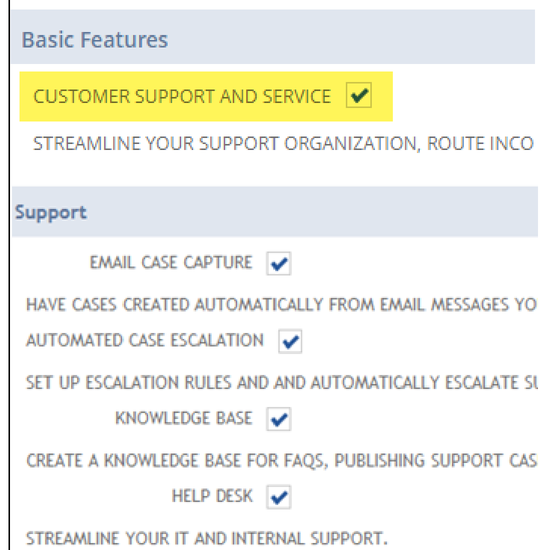
Setup Support Management in NetSuite

Use the checklist below for guidelines to set up the support management for your support team. Based loosely on SuiteAnswers 11041

#	Task	Description	Required/Optional	Defaults, Links, Tips
1	Enable Features	Basic Features that need to be enabled for Customer Service and Support to work	Required – one highlighted in yellow. Highly recommended to check Knowledge Base to allow for solutions.	Setup > Enable Features > CRM tab 
2	Setting Employee as Support Rep	Identifies the employee as a support rep so cases can be assigned to them and they can grab cases.	Required	Default = none Edit Employee > Human Resources tab > checkbox Support Rep
3	Setting Up Support Groups	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. This allows for multiple people to see the same case. Must check Support Group field to display in case dropdown field.	Optional – recommended if you are creating support queues by areas such as product or company/subsidiary.	Default = none Lists > Relationships > Groups > New
4	Set up auto-generated numbers	You define the prefix, suffix, and numbers in-between. Using this provides ease in global search for a case if you use a prefix of something like CA.	Optional – recommended for easier searching (e.g. prefix CA).	Default = numbers Setup > Company > Auto-Generated Numbers

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5	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 that specializes in that item using rules and territories. By offering support for items, customers can select on case records which item they are having trouble with.	Optional – Recommended if offering product support.	Default = unchecked Edit item > Preferences tab > Offer Support checkbox
6	Creating Case Types	Represents the kind of support your customer is reporting. Knowing what the case relates to helps support.	Optional – Most companies will want to create their own options.	Default = Concern, Problem, Question Setup > Support > Setup Tasks > Case Types > New Tip: To change order of display in drop down instead of moving them via the Case Types List change them via Support > Support Preferences > Ordering tab
7	Creating Case Issues	Further qualifies the Case Type or can be used for anything regarding this case that you want to create a list for. Knowing what issue a support case is about helps your support people get important information about a case quickly.	Optional	Default = none Setup > Support > Setup Tasks > Case Issues > New Tip: To change order of display in drop down instead of moving them via the Case Issues List change them via Support > Support Preferences > Ordering tab
8	Creating Case Origins	How a support case originated	Optional	Default = phone, web, email, other Setup > Support > Setup Tasks > Case Origin Types > New Tip: To change order of display in drop down instead of moving them via the Case Origins List change them via Support > Support Preferences > Ordering tab
9	Creating Case Statuses	Used to communicate the status of a case – from not started to closed.	Optional – Most companies will want to modify.	Default = not started, in progress, escalated, re-opened, closed Setup > Support > Setup Tasks > Case Statuses > New Tip: To change order of display in drop down instead of moving them via the Case Statuses List change them via Support > Support Preferences > Ordering tab

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10	Creating Case Priorities	Customize the rankings you give to cases to convey which cases need to be answered first.	Optional	Default = low, medium, high Setup > Support > Setup Tasks > Case Priorities > New Tip: To change order of display in drop down instead of moving them via the Case Priorities List change them via Support > Support Preferences > Ordering tab
11	Case Profiles	Default provided since version 2014.1. Used to be under Set Preferences > notification tab, but with 2014.1 all existing accounts migrated what was on this tab to a profile and new accounts were created with at least one profile. Where you set: • Support From name and email address • NS inbound email for email case capture • Customer and employee notification templates Useful from a brand consistency perspective. An organization may be responsible for handling the support of multiple entities or websites, yet these entities want to keep their own identity.	Optional – Recommended if you want a different email address than the default email address which is the Return Email Address set under Company Information.	Default = none (or NS might set the default profile) Setup > Support > Case Management > Case Profiles Setup > Support > Support Preferences > General tab > Case Email Setup Section Tips: • no limit to number of profiles • can set profile in online case forms • if using email case capture it can determine the profile based on the NS address provided in the profile.
12	Creating Case Rules And Territories And Assigning Order to Process	Create rules on how cases are assigned and then apply the rules to assign the case to support reps or support groups. Without this support reps can only "grab" a case or management need to review and assign cases. Rules use field criteria from the case record. Rules are then grouped into territories and assigned to a support rep or group. After creating territories you need to define the order to process the rules/territories. See Understanding Rules and Territories Flow and Assignment diagram at end of this doc.	Optional – Recommended	Default = Round Robin 1. Setup > Support > Case Management > Case Rules > New 2. Setup > Support > Case Management > Case Territories > New 3. Setup > Support > Case Management > Case Territories (do not select List)

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13	Setting Up Case Escalation Rules & Assignments	Similar to case rules and territories, but does not assign a case. Instead it enables an escalation so groups or individuals are notified at the right time identified in the rule. Occurs In the escalation tab of a case. After creating them you need to define the order as in Rules & Territories	Optional	Default = none Must have checked Automated Case Escalation Setup > Enable Features > CRM tab > Support section 1. Setup > Support > Escalation Management > Escalation Rules > New 2. Setup > Support > Escalation Management > Manage Escalation Assignment > New 3. Setup > Support > Escalation Management > Manage Escalation Assignment Tip: Case escalations are processed by NetSuite in five minute intervals.
14	Using Email Case Capture	Automatically converts customer support messages your company receives into organized cases in NetSuite. Can use multiple inbound email addresses if you use Case Profiles. Forwards your company's support email address to a NetSuite-generated address. You will need to make a note of this address when setting up forwarding on your mail server.	Optional – Recommended if customers may be emailing your company or if you use a contact us form from a website outside of NS.	Must have checked Email Case Capture Setup > Enable Features > CRM tab > Support section Setup > Support > Case Management > Case Profiles > general tab
15	Customizing Support Notification Email Templates	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 or new system email templates created from scratch. They can be created inside of NS or created outside of NS and then imported. Can use Freemarker code. • 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	Optional – Recommended to modify to include your logo at a minimum.	Default = 7 created (3 to customer; 4 to employee) Setup > Company > Email > System Email Templates To assign the custom template to be used: Setup > Support > Case Management > Case Profile > Notifications tab Tip: Modify the copy employee template if using third party contractors so they don't see the message history.

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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 other employees when the support rep chooses to copy other employees on an update. • to employees when a case has been escalated to them		
16	Standard Case Form Customization	You can customize the entry forms that your support staff uses to enter cases or reply to cases or any interaction with your customer or prospect. You can also customize the entry forms for the customer center that your customers will use to interact with your company.	Optional – Highly recommended since there are usually changes you want to make such as hiding fields and moving fields.	Default for internal support = Standard Case Form Default for Customer Center = Standard External Case Form Customization > Forms > Entry Forms Tips: • Check STORE FORM WITH RECORD ensures others viewing or editing will see the same form rather than the default form. • If you don't want customers in the customer center to close cases remove the Submit & Close button see SuiteAnswers 46595. Important if billing for a repair case.
17	Online Case Forms	Online case forms make it easy for you and your customers to interact on any topic or issue. It's the Contact Us page for your company. NS provides a publishable URL for use in external websites. 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.	Optional – Highly recommended.	Default = none Setup > Support > Case Management > Online Case Forms > New If using this online case form to be form in customer center for customers to enter cases then select the form in dropdown: Setup > Support > Preferences > Support Preferences > External tab Tip: One place where you can set a default profile Set in case form under Setup Workflow so you can use different online forms for branding or for different types of customers or if you have multiple companies/subsidiaries.

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18	Setting Customer Service Preferences	Set your default preferences for your customer support team.	Optional – Highly Recommended to set up your support team correctly.	Setup > Support > Preferences > Support Preferences Tips: General tab: • Check DEFAULT CASE FORM TO INTERNAL ONLY to avoid accidental emails going to customers if there are interactions with other than just the customer. Can create 3 line SuiteScript to change the setting when a specific status is entered. • Check the global setting RECEIVE CUSTOMER REPLIES IN CASE LIST ONLY to force the support reps to reply to the internal case form in NS and avoid exposing their personal email. Notification tab: • Check all the NOTIFY ASSIGNEES and NOTIFY ESCALTEES checkboxes to be alerted when a case has been assigned to them and updated. No worries, you won't receive a message when you update the case. • Check NOTIFY FILER ON SUPPORT REP CASES to automatically send email notification to customers when cases are created manually in your account by support reps or to notify to employees when they submit help desk cases. • Uncheck SEND NOTIFICATIONS REPLIES TO CUSTOMER for Assignment, Update, and Escalation forcing the support rep to reply from the NS internal case. Any replies from the support rep directly to the customer will not be sent to the customer, but shows in the case as internal only. Unchecking this avoids message history propagating in messages on case. This also avoids exposing support reps personal email address. Checking this overrides the global setting RECEIVE CUSTOMER REPLIES IN CASE LIST ONLY. • Check NOTIFY FILER ON EXTERNAL CASES to automatically send email notification to customers when cases are submitted using the external case form in the Customer Center. BUT 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.

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				Inbound Email tab: • This is a remnant of prior release before 2014.1 when the only address for email case capture was this NetSuite Address. You can ignore this and use the one(s) from the General tab in the case Profile(s). Ordering tab: • Reorder the drop down lists by clicking and dragging for case statuses, priorities, types, origins, and issues. Using the List View does not allow for drag and drop.
19	Support Topics and Solutions	Support reps can link solutions to cases for ease of replying to cases and to identify problem areas or most frequently asked questions. They can be published into a Knowledge Base. Increases support productivity, avoids errors, and provides consistency in customer replies. Solutions are answers to customer issues. They may include instructions, FAQ, or information on a product or service. Support Persons create topics and solutions, but cannot approve solutions. Support Managers or Support Administrators approve solutions and publish content.	Optional – Highly recommended.	Must have checked Knowledge Base Setup > Enable Features > CRM tab > Support Section 1. Lists > Support > Topics > New 2. Lists > Support > Solutions > New Tips: • Can search on code and title fields • Abstract – brief description of what problem is resolved • Description – the solution – can be HTML • Solutions can be attached to multiple topics and subtopics and even other solutions.
	Knowledge Base	Displays Topics and Solutions to your employees on your intranet and to customers in the customer center or in a NS website.	Optional	Default = none Lists > Support > Knowledge Base > New Tip: When you publish a topic, you also publish its subtopics and the solutions attached to these subtopics.
	Case Alerts (Beta)	Active case alerts to send emails to identified individuals. Used in conjunction with a saved search.	Optional	Default = none Setup > Support > Escalation Management > Case Alerts > New Tips: • Refreshed approximately every five minutes. • If a saved search has an existing send schedule, this will be overruled by the case alert.

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	Setting Up Customer Support in NetSuite OneWorld		Required if using OneWorld	
	Setup customer Center	The Customer Center lets customers enter/update/review cases, view their estimates, orders, invoices, and payments.	Optional –Recommended if you have repeat customers and want to give them a portal inside of NS to allow them to enter and track support cases and orders.	

Understanding Rules and Territories Flow and Assignment