### **TOC For NetSuite Customer Service Management**

#### I. Introduction to NetSuite Customer Service Management

Overview

Features

Benefits

## II. Setting Up Case Management

Creating Case Types **Creating Case Origins Creating Case Statuses Creating Case Priorities** Creating Case Issues Offering Support for Items Setting Up Support Groups **Creating Case Rules** Creating Case Territories Assigning Priorities to Territories Setting Case Escalation Rules and Assignments Using Email Case Capture **Online Case Forms Customizing Case Forms Customizing Support Notification Email** Setting Customer Service Preferences Setting Up Customer Support in NetSuite OneWorld

#### **III. Working With Cases**

- Filtering the Cases List
- Case Flowchart
- Create Cases
- **Assigning Cases**
- Escalating Cases
- Locking Closed Cases
- Tracking Time on Cases
- **Responding to Customer Cases**
- Customer Responses to Cases
- **Close Cases**
- Merging Cases
- **Deleting Cases**

# **IV. Issue Management**

Issue Management Overview Issue Management Setup Checklist Getting Started With Issue Management Setting Issue Management Preferences Setting Up Issue Statuses Creating an Issue External Status Setting Up Issue Severities Setting Up Issue Priorities Setting Up Issue Types Setting Up Issue Sources Setting Up Issue Reproducibility Setting Up Issue Tags Working with Products and Modules Creating Issue Role Types Managing Issue Status Transitions Creating Employee Groups for Issues Customizing Issue Notification Email Logging Issues Linking Issues with Cases Working with Related Issues

# V. Knowledge Base

Knowledge Base Setup Checklist Setting Up a Knowledge Base Creating Knowledge Base Topics Creating Knowledge Base Solutions Publishing a Knowledge Base Arranging Solutions in a Published Knowledge Base Attaching Knowledge Base Solutions to Cases

# **VI. Monitoring Support Performance**

Case Alerts on Support Cases Performance Metrics for Support Cases Support Reports