Return Authorization from Case SuiteApp
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Return Authorization from Case

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

- Return Authorization from Case Overview
  - Process Flow for Return Authorization from Case
- Installing the Return Authorization from Case SuiteApp
  - Availability
  - Feature Requirements
  - Installation
  - Required Roles and Permissions
- Setting Up the Return Authorization from Case SuiteApp
  - Setting the Default Range for the Date Range Filter
- Using the Return Authorization from Case SuiteApp
  - Creating a Case Record
  - Searching for a Transaction
  - Creating a Return Authorization or a Replacement Sales Order
  - Deleting, Voiding, or Canceling Records in Return Authorization from Case

Return Authorization from Case Overview

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

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

With the Return Authorization from Case SuiteApp, you can:

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

Review the guidelines and concepts in the following help topics before using the Return Authorization from Case SuiteApp:
- **Cases** – When a customer reports an issue, a question, or a suggestion to your business, you create a case in your account that is added to the cases list. This is the beginning of the case workflow.

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

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

  For more information, see the help topic Invoices.

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

  For more information, see the help topic Sales Orders.

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

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

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

### Process Flow for Return Authorization from Case

The following diagram illustrates the Return Authorization from Case process flow:
To use the SuiteApp, you start by creating a support case record based on supported customer issues. Refer to Creating Cases for the guidelines and procedures for creating case records.

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

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

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

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

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

- Approving a Customer Return Authorization
- Approving Sales Orders

Installing the Return Authorization from Case SuiteApp

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

Availability

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

Before installing the SuiteApp, enable required feature preferences.

Feature Requirements

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

- Customer Support and Service
  
  To enable customer support and service, go to the CRM subtab at Setup > Company > Setup Tasks > Enable Features. Check the Customer Support and Service box and click Save.

- Sales Orders
To enable sales orders, go to the Transactions subtab at Setup > Company > Setup Tasks > Enable Features. Check the Sales Orders box and click Save.

- **Return Authorizations**

To enable customer return authorizations, go to the Transactions subtab at Setup > Company > Setup Tasks > Enable Features. Check the Return Authorizations box and click Save.

**Important:** Return Authorization from Case supports Multiple Units of Measure and Multiple Currencies features. If you use multiple units of measure, enable the feature by following the procedure in Multiple Units of Measure. If your business uses more than one currency, complete the procedure in Enabling the Multiple Currencies Feature.

### Installation

**To install the Return Authorization from Case SuiteApp:**

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

   For more information, see the help topic Bundle Details.

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

### Required Roles and Permissions

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

<table>
<thead>
<tr>
<th>Standard Role</th>
<th>Transaction</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Invoice</td>
</tr>
<tr>
<td>Support Administrator</td>
<td>View</td>
</tr>
<tr>
<td>Support Manager</td>
<td>View</td>
</tr>
<tr>
<td>Support Person</td>
<td>View</td>
</tr>
</tbody>
</table>

For more information about customizing roles, see the help topic Customizing or Creating NetSuite Roles.
Setting Up the Return Authorization from Case SuiteApp

Setting the Default Range for the Date Range Filter

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

To set the default range for the date range filter:

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

Using the Return Authorization from Case SuiteApp

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

Creating a Case Record

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

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

Searching for a Transaction

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

- transaction type
- document number
- transaction date
The following table lists records included and excluded in the search results based on transaction status.

<table>
<thead>
<tr>
<th>Transaction Type</th>
<th>Included</th>
<th>Excluded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Invoice</td>
<td>Open, Paid in Full</td>
<td>Pending Approval, Rejected</td>
</tr>
<tr>
<td>Sales Order</td>
<td>Billed, Partially Fulfilled, Closed, Pending Billing, Pending Billing or Partially Fulfilled</td>
<td>Canceled, Pending Approval, Pending Fulfillment</td>
</tr>
</tbody>
</table>

**To search for a transaction:**

1. Go to Lists > Support > Cases.
2. Click the View link for the case record you created.
3. Click Search Transaction.
   
   Search is not enabled if both a return authorization and a replacement sales order are already linked to the case record.
4. In the Search Filters group, define your search for records:
   
   - Using the date filter:
     
     Set the date range using the From and To fields. You can select start and end dates using the calendar icon. If you have defined a default number of days for the date range filter, the range is automatically set when you select a start or end date.
     
     **Note:** If for a particular case, you choose not to use the default number of days, you can manually edit the dates to set the date range you prefer.
   
   - In the Transaction Type field:
     
     - Select All to search for both customer invoices and sales orders.
     - Select Customer Invoice to search for existing customer invoices.
     - Select Sales Order to search for existing sales orders.
   
   - In the Document Number field, enter the exact document number of the customer invoice or sales order.

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

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

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

To create a return authorization or a replacement sales order:

1. On the Search Transaction page, click the Select Transaction link for the customer invoice or sales order record you want to link to the case record.
   The Create Transaction page appears, containing the list of items purchased in the sales order or customer invoice.

   **Note:** Processing records that contain more than 500 line items may result to performance issues.

2. In the Create Transaction field, choose the transaction you want to generate.
   - Return Authorization – to generate a return authorization record from the transaction.
   - Replacement Sales Order – to generate a new sales order from the transaction.

   **Note:** You cannot choose a transaction if one of the same type is already linked to the case record.

3. In the Items sublist:
   - Under Select, check the corresponding box for the items for return or replacement.
     You must select at least one item to create a return authorization or replacement sales order.
   - In the Quantity field, enter the number of items for return or replacement.
     If you are creating a return authorization, the value should not exceed the amount specified in the Returnable Quantity column.

4. Click Submit.
5. Verify the information on the Return Authorization or Sales Order page. Edit as required.
6. Click Save.
   The generated return authorization or sales order transaction now contains a link to the support case. The link to the created transaction record is also available on the case record.

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

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

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

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

Source Transaction

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

Return Authorization

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

Replacement Sales Order

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